



Collaborator

User's and Administrator's Guide

Collaborator v12.1.12101 Manual

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1 General Information

Collaborator is a code and document review tool that helps you deliver higher quality code to QA as well as to your customer.

Getting Started

- [Tutorial \(For Developers\)](#)^[41]
- [Video Lessons](#)
- [Performing Reviews](#)^[306]

General Information

- [Overview](#)^[1]
- [Review Workflow and Phases](#)^[17]
- [Collaborator Components](#)^[13]

Using Collaborator

- [Web Client](#)^[286]
- [Desktop Clients](#)^[423]
- [Version Control Integration](#)^[540]

Server Administration

- [Tutorial \(For Administrators\)](#)^[36]
- [Collaborator Server](#)^[66]
- [Server Upgrades](#)^[81]

For Existing Users

- [What's New in Collaborator 12](#)^[877]
- [Techniques & Best Practices](#)^[861]

Support & Resources

- [Forums](#)
- [Contact Support](#)
- [Additional Resources](#)^[32]

1.1 Collaborator Overview

What is Code Review?

Code Review, or Peer Code Review, is the act of consciously and systematically convening with one's fellow programmers to check each other's code for mistakes, and has been repeatedly shown to accelerate and streamline the process of software development like few other practices can.

Code Review is an integral process of software development that helps identify bugs and defects before the testing phase. Code review is often overlooked as an ongoing practice during the development phase, but countless studies show it's the most effective quality assurance strategy. Meetings end up taking more time than intentionally planned. Not having a set process in place means you don't actually know if your code reviews are effective or are even happening.

Collaborator is a code review and document review tool that helps development, testing and management teams work together to produce high quality code. It allows teams to peer review code, user stories and test plans in a transparent, collaborative framework — instantly keeping the entire team up to speed on changes made to the code. By enabling team members to work together to review their work, Collaborator can help you catch bugs before your software hits the market.

Main features of Collaborator:

- Implements various [review styles](#)^[16]
- Multiple, simultaneous reviewers
- Workflow supporting reviewers/authors separated by many time zones
- [Version control integration](#)^[540]: Git, Perforce, Subversion, Mercurial, Team Foundation Server, ClearCase and more
- Cross-platform clients: [web client](#)^[286], [GUI clients](#)^[423], [command-line clients](#)^[445] and IDE plug-ins
- [Defect-tracking](#)^[390] with severity, type, classification, checklists, and external issue-tracker integration
- Full-featured [metrics](#)^[866], [reports](#)^[407], and [data-export](#)^[412]
- [Project- and role-based rules](#)^[230] and reporting
- [Command-line and web-service API](#)^[805] for integrations, extensions, automations, and triggers

Supported formats of review materials:

- [Text files](#)^[357] (including source code and any other text-based formats)
- [Word processing documents](#)^[355] (.DOC, .DOCX, .RTF, .DOCM, .DOT, .DOTM, .DOTX, .ODT and .OTT)
- [Spreadsheets](#)^[359] (.XLS, .XLSX, .XLSB, .XLSM, .XLTM, .XLTX and .ODS)
- [Presentations](#)^[363] (.PPT, .PPTX, .POT, .POTM, .POTX, .PPS, .PPSM, .PPSX, .PPTM and .ODP)

- [Visio vector graphics](#)^[366] (.VDW, .VDX, .VSD, .VSDM, .VSDX, .VSS, .VSSM, .VSSX, .VST, .VSTM, .VSTX, .VSX and .VTX)
- [Images](#)^[369] (.JPG, .JPEG, .PNG, .GIF and .BMP)
- [PDF documents](#)^[372] (.PDF, and any other document types converted to PDF format)
- [URLs](#)^[376] (HTTP and HTTPS)

1.2 About Collaborator Editions

Starting from version 10.0 Collaborator is distributed in three editions: Collaborator Community, Collaborator Team and Collaborator Enterprise.

Collaborator Community is the lightweight edition of Collaborator, designed especially for small development groups with simpler needs. Collaborator Community is offered free of charge and includes the basic features necessary for code review.

Collaborator Team is designed for medium development groups with moderate needs. Collaborator Team includes the majority of features necessary for code review without the extra cost of the enterprise level features found in Collaborator Enterprise.

Collaborator Enterprise is the full featured edition of Collaborator, designed especially for large development groups.

The remainder of this section will describe the differences between the three products.

Set Up and Licensing

All three editions of Collaborator are shipped within the same installer that can be found on our downloads page. The products are differentiated only by the license codes installed. During a trial installation, the product option will be given in the [First-Run Initialization](#)^[37] phase. After installation, you can easily switch from one edition to another, by changing out the license code with a new one provided by your account manager.

Collaborator Feature Summary by Edition

The table below will help you assess the functional differences between Collaborator editions:

System Administration			
Feature	Collaborator Community	Collaborator Team	Collaborator Enterprise

Licenses ⁸⁷	Fixed licenses only	Fixed licenses only	Fixed and concurrent licenses available
License Model ⁸⁷	Perpetual	Subscription	Subscription or Perpetual
Database Back-Ends	<u>Embedded</u> ⁸⁹	<u>Embedded</u> ⁸⁹ , <u>MySQL</u> ⁶⁰	<u>Embedded</u> ⁸⁹ , <u>MySQL</u> ⁶⁰ , <u>SQL Server</u> ⁶³ , <u>Oracle</u> ⁶⁶
LDAP / ActiveDirectory Authentication ¹⁰⁶	Not Supported	Supported	Supported
Single Sign-On ¹²⁴	Not Supported	Not Supported	Supported
Number of users	Up to 10	Up to 25	Unlimited - Based on Licenses Owned
Technical support	No	Yes	Yes

File Type Support			
Type	Collaborator Community	Collaborator Team	Collaborator Enterprise
Word Processing Documents ³⁵⁵	Not Supported	Not Supported	Supported
Spreadsheets ³⁵⁹	Not Supported	Not Supported	Supported
Presentations ³⁶³	Not Supported	Not Supported	Supported
Visio Documents ³⁶⁶	Not Supported	Not Supported	Supported
PDF Documents ³⁷²	Not Supported	Not Supported	Supported
Image Files ³⁶⁹	Not Supported	Supported	Supported
Live URLs ³⁷⁶	Supported	Supported	Supported

Server Configuration Options			
Features	Collaborator Community	Collaborator Team	Collaborator Enterprise
<u>Subscriptions</u> ^[176]	Supported	Supported	Supported
<u>Bug Tracking Integration</u> ^[184]	Supported	Supported	Supported
<u>User Statistics</u> ^[206]	Supported	Supported	Supported
<u>Email Notifications</u> ^[189]	Supported	Supported	Supported
<u>Server-Side Version Control Integrations</u> ^[194]	Supported	Supported	Supported
<u>System Status</u> ^[201]	Supported	Supported	Supported
<u>Groups</u> ^[212]	Not Supported	Not Supported	Supported
<u>Review and Uploads Access Restrictions</u> ^[177]	Not Supported	Not Supported	Supported
<u>Review Custom Fields</u> ^[235]	Not Supported	Limited. Only 2 fields.	Unlimited
<u>Participant Custom Fields</u> ^[236]	Not Supported	Not Supported	Supported
<u>Defect Custom Fields</u> ^[244]	Not Supported	Limited. Only 2 fields.	Unlimited
<u>Multiple Role Configurations</u> ^[253]	Not Supported	Not Supported	Supported
<u>Configurable Workflow</u> ^[230]	Not Supported	Supported	Supported
<u>Server-Side Triggers</u> ^[196]	Not Supported	Not Supported	Supported
<u>Customizable Notifications</u> ^[262]	Not Supported	Not Supported	Supported

<u>Automatic Links</u> <small> 260 </small>	Not Supported	Not Supported	Supported
<u>Archiving Reviews</u> <small> 153 </small>	Not Supported	Not Supported	Supported
<u>Review Checklists</u> <small> 250 </small>	Not Supported	Supported	Supported
<u>Electronic Signatures</u> <small> 183 </small>	Not Supported	Not Supported	Supported
<u>Server Branding</u> <small> 156 </small>	Not Supported	Not Supported	Supported

Clients and Version Control Integrations			
Client/VCS	Collaborator Community	Collaborator Team	Collaborator Enterprise
<u>Web GUI</u> <small> 289 </small>	Supported	Supported	Supported
<u>GUI Client</u> <small> 435 </small>	Supported	Supported	Supported
<u>External Diff Viewer Launcher</u> <small> 535 </small>	Supported	Supported	Supported
<u>Eclipse Plugin</u> <small> 464 </small>	Supported	Supported	Supported
<u>Visual Studio Plugin</u> <small> 503 </small>	Supported	Supported	Supported
<u>Command Line Client</u> <small> 445 </small>	Supported	Supported	Supported
<u>Tray Notifier</u> <small> 533 </small>	Supported	Supported	Supported

Version Control Integration	<u>Git</u> ⁵⁶³ , <u>Subversion</u> ⁷¹⁰ , <u>GitHub</u> , <u>Bitbucket</u> , <u>GitLab</u> ⁷³⁵	<u>CVS</u> ⁵⁵³ , <u>Git</u> ⁵⁶³ , <u>Mercurial</u> ⁶⁴⁵ , <u>Perforce</u> ⁶⁷⁸ , <u>Subversion</u> ⁷¹⁰ , <u>Team Foundation Server</u> ⁶⁵³ , <u>GitHub</u> , <u>Bitbucket</u> , <u>GitLab</u> ⁷³⁵	<u>CVS</u> ⁵⁵³ , <u>Git</u> ⁵⁶³ , <u>Mercurial</u> ⁶⁴⁵ , <u>Perforce</u> ⁶⁷⁸ , <u>Subversion</u> ⁷¹⁰ , <u>AccuRev</u> ⁵⁴² , <u>PTC Integrity</u> ⁶⁶⁶ , <u>ClearCase</u> ⁵⁸³ , <u>Rational Synergy</u> ⁶⁰⁶ , <u>Rational Team Concert</u> ⁶¹⁴ , <u>Team Foundation Server</u> ⁶⁵³ , <u>GitHub</u> , <u>Bitbucket</u> , <u>GitLab</u> ⁷³⁵
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Reports

The table below compares the fields and metrics available in different editions of Collaborator.

Reports			
Column/Field	Collaborator Community	Collaborator Team	Collaborator Enterprise
<i>Customizable Review Reports</i>			
ID	Not Supported	Supported	Supported
Review Title	Not Supported	Supported	Supported
Review Creation Date	Not Supported	Supported	Supported
Review Completion Date	Not Supported	Supported	Supported
Workflow	Not Supported	Supported	Supported
Phase	Not Supported	Supported	Supported
Review is Private	Not Supported	Supported	Supported
Creator Login	Not Supported	Supported	Supported
Creator Full Name	Not Supported	Supported	Supported
Author Login	Not Supported	Supported	Supported

Author Full Name	Not Supported	Supported	Supported
Moderator Login	Not Supported	Supported	Supported
Moderator Full Name	Not Supported	Supported	Supported
Reviewer Login	Not Supported	Supported	Supported
Reviewer Full Name	Not Supported	Supported	Supported
Observer Login	Not Supported	Supported	Supported
Observer Full Name	Not Supported	Supported	Supported
Defect Count	Not Supported	Supported	Supported
Open Defect Count	Not Supported	Supported	Supported
Overview	Not Supported	Supported	Supported
Group	Not Supported	Supported	Supported
Defects per Hour	Not Supported	Supported	Supported
Comment Count	Not Supported	Supported	Supported
Last Comment	Not Supported	Supported	Supported
Idle for	Not Supported	Supported	Supported
File Count	Not Supported	Supported	Supported
LOC	Not Supported	Supported	Supported
LOC Changed	Not Supported	Supported	Supported
LOC Added	Not Supported	Supported	Supported
LOC Removed	Not Supported	Supported	Supported
LOC Modified	Not Supported	Supported	Supported
LOC Delta	Not Supported	Supported	Supported

Review Wall-Clock Duration	Not Supported	Supported	Supported
Total Person-Time	Not Supported	Supported	Supported
Reviewer Time	Not Supported	Supported	Supported
Author Time	Not Supported	Supported	Supported
Number of Participants	Not Supported	Supported	Supported
Average Participant Time	Not Supported	Supported	Supported
Custom Fields	Not Supported	Supported	Supported
<i>Review Detail Reports</i>			
<i>Overview</i>			
ID	Supported	Supported	Supported
Status	Supported	Supported	Supported
Title	Supported	Supported	Supported
Creator	Supported	Supported	Supported
Created On	Supported	Supported	Supported
Finished On	Supported	Supported	Supported
Wall-Clock Time	Supported	Supported	Supported
Number of Defects	Supported	Supported	Supported
Number of Comments	Supported	Supported	Supported
Overview	Supported	Supported	Supported
Total Person Time	Not Supported	Supported	Supported
Total Reviewer Time	Not Supported	Supported	Supported

LOC All Version (Uploaded/ Changed)	Not Supported	Supported	Supported
LOC Final Version (Uploaded/ Changed)	Not Supported	Supported	Supported
Document Pages (Final)	Not Supported	Supported	Supported
Custom Fields	Not Supported	Supported	Supported
<i>Participants</i>			
Name	Supported	Supported	Supported
Role	Supported	Supported	Supported
Person-Hours	Not Supported	Supported	Supported
Per Participant Custom Fields	Not Supported	Not Supported	Supported
<i>Defect Log</i>			
ID	Not Supported	Supported	Supported
Creator	Not Supported	Supported	Supported
File	Not Supported	Supported	Supported
Location	Not Supported	Supported	Supported
Text	Not Supported	Supported	Supported
Defect Custom Fields	Not Supported	Supported	Supported
<i>Materials Summary</i>			
Num Files	Supported	Supported	Supported
Num Code Files	Supported	Supported	Supported
Num Images	Supported	Supported	Supported
Num Other Binaries	Supported	Supported	Supported

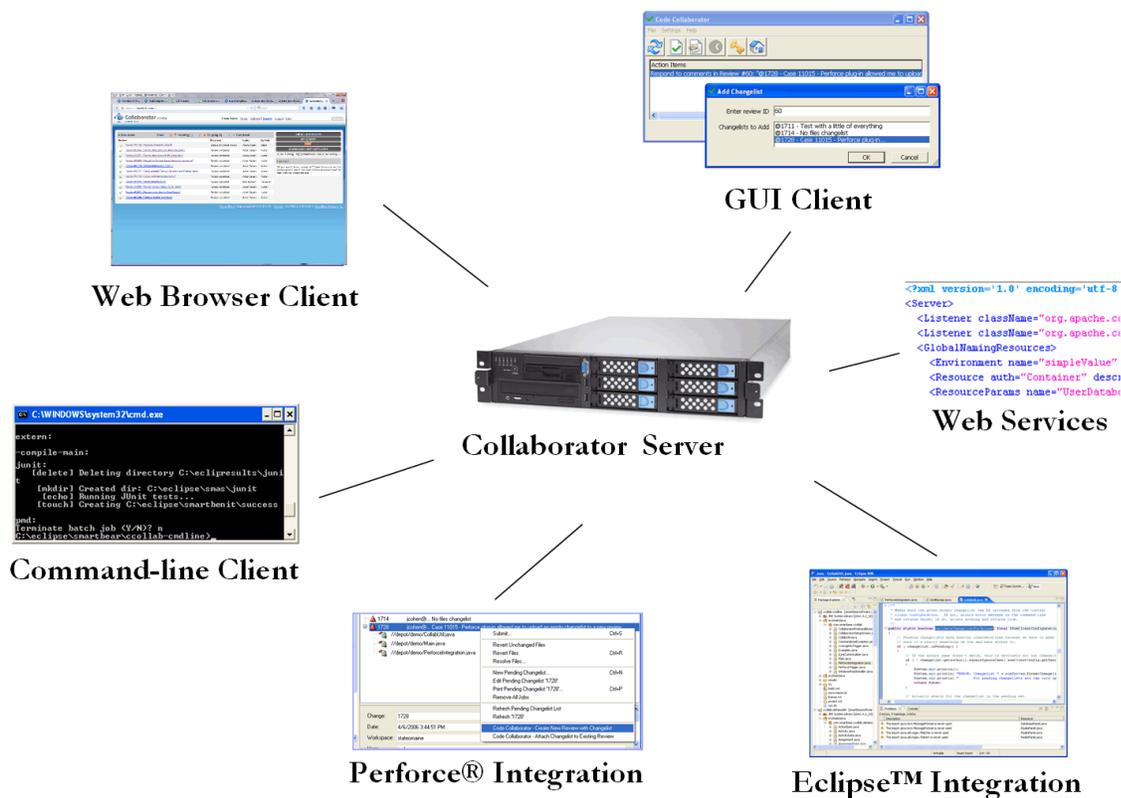
Num Changelists	Supported	Supported	Supported
LOC (Uploaded)	Supported	Supported	Supported
LOC (Changed)	Supported	Supported	Supported
Num Documents	Not Supported	Supported	Supported
Num URL's	Not Supported	Supported	Supported
Document Pages	Not Supported	Supported	Supported
Inspection Rate (Uploaded)	Not Supported	Supported	Supported
Inspection Rate (Changed)	Not Supported	Supported	Supported
Document Inspection Rate	Not Supported	Supported	Supported
Image Inspection Rate	Not Supported	Supported	Supported
URL Inspection Rate	Not Supported	Supported	Supported
Binary Inspection Rate	Not Supported	Supported	Supported
Code Defect Density (Uploaded)	Not Supported	Supported	Supported
Code Defect Density (Changed)	Not Supported	Supported	Supported
Document Defect Density	Not Supported	Supported	Supported
Image Defect Density	Not Supported	Supported	Supported
<i>Materials Detail</i>			
Path	Supported	Supported	Supported
Version	Supported	Supported	Supported

Annotation	Supported	Supported	Supported
LOC	Supported	Supported	Supported
LOC Changed	Supported	Supported	Supported
# Comments	Supported	Supported	Supported
Defects	Supported	Supported	Supported
<i>Overall Review Conversation</i>			
Speaker	Supported	Supported	Supported
Text	Supported	Supported	Supported
<i>Customizable Defect Reports</i>			
Defect ID	Not Supported	Supported	Supported
Review ID	Not Supported	Supported	Supported
State	Not Supported	Supported	Supported
Review Title	Not Supported	Supported	Supported
Review Creation Date	Not Supported	Supported	Supported
Review Completion Date	Not Supported	Supported	Supported
Created	Not Supported	Supported	Supported
Creator Login	Not Supported	Supported	Supported
Creator Full Name	Not Supported	Supported	Supported
File	Not Supported	Supported	Supported
File Version	Not Supported	Supported	Supported
Changelist ID	Not Supported	Supported	Supported
Changelist Date	Not Supported	Supported	Supported
Changelist Author	Not Supported	Supported	Supported

Changelist Comment	Not Supported	Supported	Supported
SCM Type	Not Supported	Supported	Supported
Location	Not Supported	Supported	Supported
Comment	Not Supported	Supported	Supported
Review Group	Not Supported	Supported	Supported
Defect Custom Fields	Not Supported	Supported	Supported
<i>User Reports</i>			
ID	Not Supported	Supported	Supported
Login	Not Supported	Supported	Supported
Name	Not Supported	Supported	Supported
E-mail	Not Supported	Supported	Supported
Phone	Not Supported	Supported	Supported
Last Login	Not Supported	Supported	Supported
Last Activity	Not Supported	Supported	Supported
Last Logout	Not Supported	Supported	Supported
System Admin	Not Supported	Supported	Supported
Enabled	Not Supported	Supported	Supported
User Activity	Not Supported	Supported	Supported

1.3 Collaborator Components

Collaborator includes a server component, and a variety of clients, 3rd-party integrations, and client protocols.



Collaborator Server ⁵⁶

As with most enterprise-class software systems, a server process acts as the hub, manager, and controller of information. The server has a web-based user interface where users and administrators can do everything — create and perform reviews, configure personal and system-wide settings and run reports. The server uses a database to store all data and configuration.

Web Client ²⁸⁷

The web browser client is used by entering an external URL in a web browser to connect to the Collaborator server. This is where most of the review will take place, where you edit, view, configure the reviews. The Web Client supports any modern browser.

Command-line Client ⁴⁴⁵

Developers will typically install the cross-platform client. This tool includes a Command-Line Client that lets you upload local files (and file-changes) into new and existing reviews. The Command-Line Client also includes scripting commands for implementing custom behavior and integrating with external systems.

There are many reasons why you might want to integrate Collaborator with other systems. An issue-tracker integration point might let you synchronize Collaborator "defects" with issue-tracker "issues," or you might want to mirror review data (metrics/comments/file-differences) into the associated ticket. A reporting integration point might let you mirror Collaborator metrics into your existing reporting system (examples: defects/kLOC, defects/man-hour, kLOC/man-hour, number of defects found of different types or severities, etc).

GUI Client

The cross-platform client install includes a graphical client to complement the web-based user interface already provided by the server. The GUI client is a cross-platform client available for Windows, Mac, and Unix/Linux users.

Eclipse Integration

The Eclipse Plug-in gives users the ability to upload files and perform reviews from within any Eclipse-based application. A variety of applications are supported.

Visual Studio Integration

The Visual Studio Extension gives users the ability to upload files and perform reviews from within Microsoft Visual Studio.

Version Control Integration

Collaborator integrates with many popular Version Control Systems. Integrations include command-line, graphical, and Eclipse plug-in clients and Version Control triggers. Server integration is supported for selected Version Control Systems and requires that a properly configured client be configured on the Collaborator server.

Perforce Integration

Perforce users will probably want to install the Perforce Client Integration tools. These are included in the [client installer](#) .

Integration with P4V and P4Win lets users upload changelists into new or existing reviews just by right-clicking on the changelist. This works on both "pending" and "submitted" changelists.

We also supply a special tool for use as a Perforce server trigger. For example, you can use this to enforce a rule like "Every submit on this branch requires a review". You can also use this to automatically upload all submitted changelists into Collaborator so that you can review files after they have been checked in. This can be especially useful with off-shore development groups.

Tray Notifier⁵³³

In addition to uploading files, the GUI Client gives you a taskbar icon that updates to show you whether you have any pending tasks in Collaborator. This is called the Tray Notifier and is available to Windows and Unix/Linux users. This allows users to easily access pertinent reviews and alerts the user of any new activity in reviews without being actively involved in the web browser client.

External Integrations⁸⁰⁵

Besides that, you can integrate Collaborator with any other external tool by using scripts or JSON API web services.

1.4 Review Styles

How we view different styles of review

Below are some guidelines for how to structure different types of reviews as well as some settings to consider.

Quick & Easy – Generally, these are the types of reviews done when not a lot of formality is required. The review process typically includes:

- Very few participants. Minimally, one Author²⁵³ and at least one Reviewer²⁵³;
- Limited number of custom fields²³⁵;
- Participants not required to 'Mark Read' all comments²⁵⁸;
- No Moderators (special persons who lead and control the review).

Formal Inspection – Formal inspections require specific processes to be followed. Often this is driven by regulations or the need for an audit trail. Formal Inspections typically include:

- Moderators²⁵³ (special persons who lead and control the review);
- Multiple review participants including Reviewers and Observers²⁵³ (subject matter experts);
- Custom fields²³⁵ for capturing additional details;
- Requirements for Moderators and Authors to 'Mark Read' all comments²⁵⁸.

Document Review – Reviewing documents can be as informal or formal as is needed. Most often, the type of document is what drives the formality of the review. Here are some key Collaborator functionality items to consider:

- Should all Reviewers be required^[259] to participate or not;
- Remember, that the file name must not change. Do not append anything like _v2 to the next revision of the file;
- Create a unique template that contains Roles^[253], Custom Fields^[235] and Automatic links^[260] that are important for document review;
- Learn how to use the zoom, scroll and lock^[342] options.

Safety Critical – This is the most formal of all the review processes. Basically, build a template based on the Formal Inspection template.

- Additional custom fields^[235] could be required for capturing data;
- Enable Electronic signatures^[182] for final signoff;
- Require that all participants 'Mark Read' all comments^[258];
- Enable Checklists^[250] so that nothing is overlooked;
- Archive the review using 'Save to ZIP^[153]'.

1.5 Review Workflow and Phases

This section describes a typical review and its phases.

Review Creation

Any of the following actions will create a review:

- Clicking the New Review^[309] button in the Web Client Home page.
- Adding new materials to a new review through the GUI Client^[435], Command-Line Client^[445], Eclipse Plug-in^[484], Visual Studio Extension^[503], or Perforce Plugins^[699].
- Using the ccollab admin review create command in the Command-Line Client.
- Triggering a script^[825] that creates a new review.

Once a review is created it goes into the Planning phase.

Planning Phase



In the Planning phase, only the review creator is active to customize the review using the [Review Creation Wizard](#)^[309]. Here the creator enters review attributes including the title, [custom fields](#)^[235], attaches [review materials](#)^[312], and assigns [participants](#)^[311] to the review.

Using the "Annotate" and "Inspect" buttons on the [review header toolbar](#)^[317], you can save your current information and move the review to another phase.



Annotating Phase



The Annotating phase is an optional phase that an author may select before the Inspection begins. It provides the opportunity for other participants to add [comments](#)^[385], [review materials](#)^[312] or [open defects](#)^[390] prior to the Inspection phase. When a review is moved to Annotating, Collaborator will send notifications to all selected [participants](#)^[311] inviting them to participate in the review. Like Planning, Collaborator will not automatically move the review from the Annotating phase.

The review header toolbar includes only the "Inspect" button for moving the review to the Inspection phase.



Inspection Phase



Once the review has begun, Collaborator activates all roles and notifies the participants that their actions are required in the review. Participants are presented^[316] with the files, file-differences^[353], and other review material. Everyone can make comments on individual lines of a file or on entire documents.

Comments^[385] work a bit like "instant message" chat and a bit like "newsgroups". If everyone is chatting at the same time, you have a real-time "instant message" environment so the review can progress swiftly. If one or more participants are separated by many time zones or just are not currently at the computer, the chat looks like a newsgroup where you post comments and receive e-mails when someone responds. This means Collaborator works equally well no matter where your developers or reviewers are located.

If reviewers find problems, they open defects^[390] right from the Web Client, associated with the file and line number if applicable. Defects are tracked through Collaborator and can optionally be mirrored or exported^[396] to an external issue-tracking system.

Once all required^[259] participants have indicated that they are finished with the current phase, the review moves to the next phase, which will depend on whether open defects^[390] remain in the review.

If there are no defects or all defects have been marked external^[396] or fixed^[392], the review moves to the Completed phase.



If the review contains any open defects, the review moves on to the Rework phase.



Rework or Fix Defects Phase



In the Rework phase, the authors are the only roles active so that they may fix the defects found in the Inspection phase. When the authors are satisfied with their fixes, the fixes are uploaded into the review. The authors then indicate they are ready for the fixes to be validated by clicking the "Send to Inspection" button.



For validation, the review moves back to the Inspection phase, where reviewers have access to the new changes as well as the original changes and comments.

Completed Phase

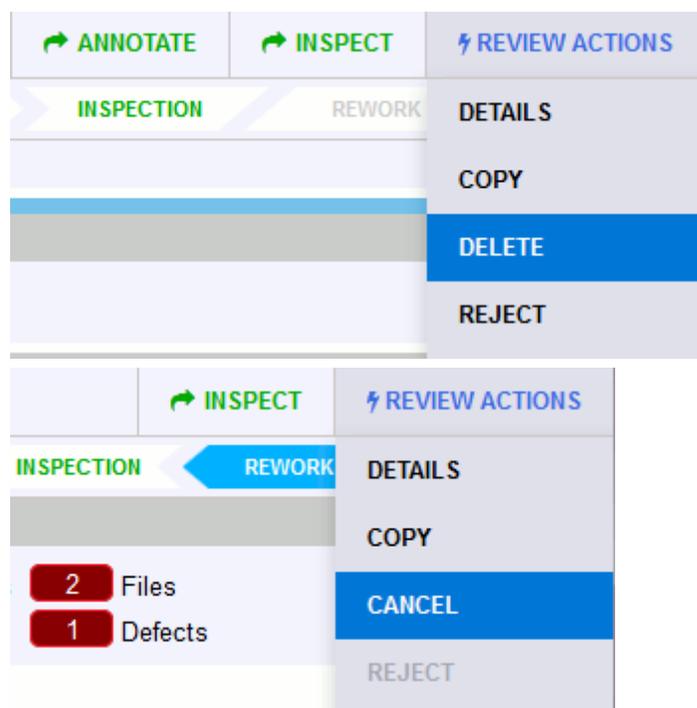


Only when no open defects remain and all [required](#)^[259] participants have approved the review during inspection, then the review goes to the Completed phase.

Cancelled Phase



Depending on the [Allow Deleting/Cancelling Reviews](#)^[180] administrative setting, there may be an option for the author/creator to [delete](#)^[318] or [cancel](#)^[318] a review. In this case, the **Delete** action will become enabled for planned reviews and **Cancel** actions will become enabled for in-progress reviews:



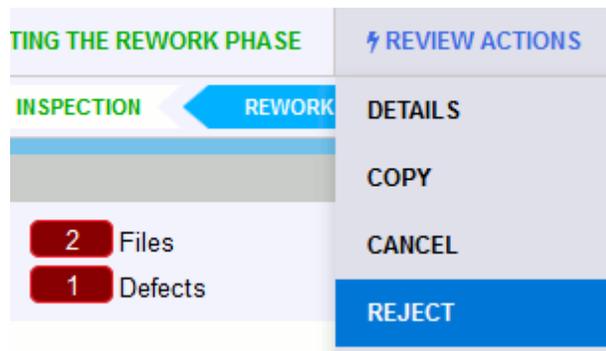
Clicking the "Delete" button completely removes the review from the database. A deleted review can never be restored.

Clicking the "Cancel" button moves the review to the Cancelled phase. A cancelled review can only be re-activated by an administrator.

Rejected Phase



Depending on the [Allow Reject Review](#)^[18] administrative setting, there may be an option for reviewers to [reject](#)^[318] a review. In this case, the **Reject** action will become enabled for in-progress reviews:



Clicking the "Reject" button invokes a dialog where you can specify reject reason and then moves the review to the Rejected phase. Rejected review cannot be reactivated even by administrator.

1.6 How Do I?

This section is included as a quick help to get you introduced to some basic tasks in Collaborator. This section is formatted in a series of questions and answers focused on describing how to use Collaborator. While the rest of the manual will serve as the ultimate reference manual, explaining each part or component of Collaborator in detail, this section will be useful if you are new to Collaborator and want to learn how to perform tasks in a quick and easy way. The following questions may not include all your questions, so if you find yourself in need of help, please contact our support team whose information is listed in the [Contact Us](#) section.

1.6.1 How Do I Get Started?

- [See a typical code review in action?](#)
- [Get started with Collaborator?](#)
- [Experiment with Collaborator without installing the product?](#)
- [Make sure code reviews are worth the effort without taking too much time out of my work day to try them out?](#)
- [Perform my first review?](#)

See a typical code review in action?

To get introduced to Collaborator, we recommend viewing a [demo](#) to see how it works and how a typical review is done.

You can also attend a [webinar](#) (either live or recorded), where we go through a more in-depth demo and also answer your individual questions in real time!

Get started with Collaborator?

If you are new to Collaborator, we have heaps of reference materials that help you use and understand the product.

If you want to start evaluating Collaborator or get a quick start with the basics, we suggest the Getting Started guides. Getting Started with Collaborator Server helps system administrators install and configure the main Collaborator server, while Getting Started with the Collaborator Client helps developers get started conducting code reviews with Collaborator.

[System Administrators](#)^[38]

[Developers](#)^[41]

We also have the User's manual that serves as a reference manual for everything you want to know about Collaborator. It is divided into sections for installation and server administration, web reviews and the web browser client, the specific integrations, and external integrations.

And if you still have questions, you can always [contact us](#)^[39]. We would be happy to assist you with any specific questions about Collaborator.

Experiment with Collaborator without installing the product?

We have a demo server waiting for you to try! The demo server is an already set up Collaborator server, so you do not have to hassle with administrating a server.

- 1) Visit our demo server at <http://demo.smartbear.com>.
- 2) Create a new account by supplying a login name and password of your choice under "Create a new User" and jump right into Collaborator.

Note: The demo server is publicly available to everyone. Do NOT post confidential information and/or materials.

For more detailed information on how to get started with the demo server, visit our blog entry [here](#).

- 3) Read our [Getting Started Guide for Developers](#)^[41] to quickly get caught up with the basic code review steps, or explore around by clicking random links to learn by trial and error.

Make sure code reviews are worth the effort without taking too much time out of my work day to try them out?

We think code reviews are awesome, but we understand you might be skeptical. And why invest in something you are not sure of? We put together some tips on how to minimize your time evaluating the code review process. This document, [Is Code Review for You?](#), explains how to try code review for a week, how to see if it delivers solid, measurable results for your team, and how to get your team on board.

Perform my first review?

So you have been assigned your first review, and you are not sure what the next steps are. We'll guide you through so you can jump right in. Just read our blog post [here](#).

1.6.2 How Do I Do Reviews?

- [Know what parts I really need? What are all these parts?](#) [26]
- [Create a new review?](#) [26]
- [Get around having to *Read* all comments?](#) [27]
- [Figure out what "Accept" means?](#) [27]
- [Know why \(or when\) was \(or will I be\) I brought back to a review?](#) [27]
- [Put a review on pause?](#) [27]
- [Finish a review/Clear an action item?](#) [28]
- [Finish a stalled review? Perhaps someone left for vacation, and now the review cannot be completed.](#) [28]
- [Indicate file review order?](#) [28]
- [Remove a participant from a review?](#) [28]
- [Change my notification level?](#) [28]
- [Remove a file?](#) [28]
- [Compare files or choose which version of a file to look at?](#) [29]
- [Change the Diff Viewer? I don't like the Diff Viewer.](#) [29]
- [Find out how much time I have spent on each review?](#) [29]
- [Do code review in Eclipse?](#) [29]
- [Add files to a review from Visual Studio?](#) [29]
- [Review Office Documents?](#) [29]
- [Delete/redact a comment?](#) [29]
- [Compare ClearCase files that are on two different branches?](#) [30]

Know what parts I really need? What are all these parts?

Every organization needs a Collaborator Server installed and set up. (Read the [Getting Started for Server Administrators](#) [30] for instructions.) The server process acts as the hub, manager, and controller of information. ([Download](#) the Server Installer for this component.)

To connect to the server, you use the [Web Browser Client](#)^[287] by entering a URL (provided by your Collaborator server administrator) into your web browser. The Web Browser Client is where users and administrators can do everything — create and perform reviews, configure personal and system-wide settings and run reports.

The following clients are all optional but very useful. Which one works best for you depends on your version control system, code review environment, and/or personal preferences. Just read the descriptions, and choose what you need or want to use.

The [Command-Line Client](#)^[445] is a cross-platform client interface to the Collaborator server. It can be used for uploading files, integrating with version control, and querying the server, or as a part of an automated script in a sophisticated ALM / build system.

The [GUI Client](#)^[436] is a cross-platform graphical client to complement the web-based user interface already provided by the server. Use it to upload materials to a new or existing review easily by integrating with any or a combination of the following Version Control Systems: AccuRev, ClearCase, CVS, PTC Integrity, Perforce, Rational Synergy, Rational Team Concert, Subversion, and Team Foundation Server. (If you use a different VCS, you can always use the Command-Line Client.)

The [Tray Notifier](#)^[533] is a taskbar icon that shows whether you have any pending tasks in Collaborator. This icon allows you to easily access pertinent reviews and alerts you of any new activity in reviews without requiring active involvement in the web browser client.

The [Perforce P4V/P4Win plug-ins](#)^[699] integrate with the Perforce GUI clients and allows you to upload changelists into new or existing reviews just by right-clicking on the changelist.

The [Eclipse Plug-in](#)^[464] lets you upload files and create reviews from within any Eclipse-based application.

The [Visual Studio Plug-in](#)^[503] gives you the ability to upload files and create reviews from within Visual Studio.

Create a new review?

In the [Web Browser Client](#)^[287], creating a new review is as simple as clicking on the **Create New Review** button at the top right of the action items section of the Collaborator home page and filling out the information in the next screen.

Wait, your **Create New Review** link is disabled? Congratulations, you are the Collaborator administrator. By default, we do not allow admins to participate in reviews, so the link at the top right does not show up. You can change this setting by going to the **Admin** link on the menu bar at the top of the screen. Once you are at the Admin menu, scroll down to the "Review Process Options" and set the *Allow System Administrator to Perform Reviews* setting to *Yes*.

In the Command-Line Client, use the command: `collab admin review create` to create a new review.

You can also create a new review when adding review materials from the GUI Client, the Eclipse Plug-in, the Visual Studio plugins, and the P4V plugins.. The client will give the option to add the material to a new review or an existing review. Be sure to select *Create New Review* if you want a new review.

Get around having to ***Read*** all comments?

In the default configuration, you must ***Read*** all comments. But you can change this! As the system administrator, you can change this setting; go to the **Admin** menu, look under the sub-category **Roles**, select a Role "set", and change *Required to Read All Comments* to *No*. This setting is configurable for each role, so you can ensure that all comments are read by someone, but not everyone.

When this setting is configured to *Yes*, a review participant cannot click the Finish button if the review contains unread comments. When set to *No* for a role, this setting allows a review participant to click the Finish button even if there are unread comments. Also, you will not be brought back to a review if some other participant has commented after your clicked the Finished button. Read our extended blog entry about this feature [here](#).

But my system administrator will not change this setting...

You'll have to mark all comments read, but you can do this easily by clicking the super **Mark All Comments as Read** button at the top left of the Diff Viewer. You will still have to click it for every file (hey, we have to make sure you are looking at the files) but it saves you clicks in the end.

Figure out what "Accept" means?

We get this question often, and the short answer is: "Accept" means whatever you want it to mean, so you do not even have to use it if you do not want to. "Accept" does not have an explicit meaning in Collaborator; it is used differently in different environments. So, you can use this feature however you think best suits your review environment. Once this button is clicked, a green checkmark appears to notify participants that a comment has been Accepted.

Know why (or when) was (or will I be) I brought back to a review?

You may have been brought back into a review because of your *Required to Read All Comments* setting (See above). Read more about this [here](#).

Put a review on pause?

If you cannot continue or finish reviewing because you are waiting for more information (For example, an answer to a question you posed in a comment), you can put the review on hold by using the **Wait** button in the Next Steps section. "Wait" keeps you deactivated from the review until the action option you have selected occurs. So the **Wait** button is for when you want to come back to a review at a later time. If you don't return and the selected activity does not occur, the review will not be marked finished, so to prevent a review from stalling, be sure to come back and finish it.

Finish a review/Clear an action item?

So you want to finish your part of the review. If you are in a role that has the ability to mark reviews finished, it is pretty simple. First, defects must be marked resolved: either *fixed*, *deleted* or *tracked externally*. Then, under the "Next Steps" section, select **Send to Completed**. If you are not the only reviewer, a list of actions will appear. You can select an action to indicate that you are finished with the review *unless* the selected action occurs. If you are required to read all comments, make sure all comments have been marked read before clicking **Send to Completed**. You will also be brought back to the review if another comment is made after you have approved a review.

Finish a stalled review? Perhaps someone left for vacation, and now the review cannot be completed.

Several things may prevent a review from being marked *Complete*. If an open defect is keeping you from closing a review, have a system administrator resolve the defect, and you will be able to finish the review. If the absent participant is the only person who has the ability to complete reviews, simply change that participant's role in the review so that they are assigned to a role that is not required to complete the review. For more detailed information, read the blog post, "Ending a Review Now", [here](#).

Indicate file review order?

You can use the "General Chat" and the "Notes" areas to annotate files and give instructions on suggested file review order. For detailed step-by-step instructions, read our blog post [here](#).

Remove a participant from a review?

Removing a participant from a review simply requires clicking the red 'X' next to their name.

Change my notification level?

You can change the frequency at which you receive notification emails by going to your **Preferences** menu and then setting the *Notification Level* in the **Notifications** tab. When your individual preferences are set to the default setting, *Minimal*, you only get notifications resulting from other users' actions. You can also change the setting to *None* or *All*.

Remove a file?

Once a review has started, removing a file is only possible if there are no comments or defects linked to the file. To remove a file, click the **Edit** button on the "Review Materials" section of the review summary screen. You should see a **[Delete]** link to the left of the file or changelist, in which case click the link to delete the file. You may need to set the "View As:" option to "Separate" in order to be able to see the specific version of the file you wish to remove.

If you do not see the link, it indicates that comments or defects are linked to the file or changelist; you will not be able to delete the file because it would orphan comments.

Compare files or choose which version of a file to look at?

To view different versions of the file you are reviewing in the Diff viewer, click on **Compare** at the top of the Diff viewer. Collaborator shows you a list of all available versions that you can choose from. Use the radio buttons for the right and left side of the Diff Viewer to select the versions. To view only one version, set both left and right sides to the same version.

You can also compare a current version to the latest Accepted version, which is detailed [here](#).

Change the Diff Viewer? I don't like the Diff Viewer.

You cannot change the aesthetics of our Diff Viewer, but if you prefer other diff viewer software, we do support an External Diff Viewer Launcher, which you can use to review diffs in a separate diff viewer of your preference. To configure this capability, please visit the owner's manual [here](#) ^[538].

Find out how much time I have spent on each review?

Beginning with Collaborator v6.0, user oriented reports allow you to view your own statistics even if you are not an administrator. View our blog post [here](#).

Do code review in Eclipse?

With the Eclipse Plug-in, you can now review code within Eclipse. To get caught up with the new changes, visit our blog [here](#).

Add files to a review from Visual Studio?

Beginning with Collaborator v6.0, the Visual Studio Add-in offers support for adding files to Collaborator from Visual Studio. To learn more about this add-in and feature, visit our blog [here](#).

Review Office Documents?

Collaborator has native support for Microsoft Office [Word \(.doc and .docx\)](#) ^[355] and [Excel \(.xls and .xlsx\)](#) ^[359] documents. To review other types of Microsoft Office Documents you will need to convert them to [PDF format](#) ^[372] first.

Delete/redact a comment?

While we still don't allow the [deletion of comments](#), we do provide a way to indicate that a comment is now irrelevant and should not be considered for the review. Detailed steps and screenshots are available [here](#).

Compare ClearCase files that are on two different branches?

To compare file versions that are on two different branches in ClearCase you have to specify the specific ClearCase version identifiers. Beginning with v6.0 of Collaborator you can use our GUI Client to do that; detailed steps are available [here](#).

1.6.3 How Do I Do Setup or Administrate the Server?

- [Switch from internal authentication to LDAP?](#)^[30]
- [Reset my password?](#)^[30]
- [Upgrade to a new version of the Collaborator server?](#)^[30]
- [Change administrative control \(especially in LDAP\)?](#)^[31]
- [How do I view metrics and reports?](#)^[31]
- [Collect data from each review participant?](#)^[31]
- [Find metrics for non-text documents?](#)^[31]
- [Define groups of users?](#)^[31]

Switch from internal authentication to LDAP?

The easiest way to change authentication options is to re-run the installer again. There is no need to uninstall, just run the installer over the existing installation. From there, you can choose "LDAP Authentication" when asked and provide your LDAP credentials.

Reset my password?

Sorry, you will have to ask your Collaborator system administrator about this one.

Upgrade to a new version of the Collaborator server?

- 1) [Back up first!](#)^[36]
- 2) Note your Support and Upgrades date by going to **Admin>Licensing** . In the Current Licensing box, take note of the date next to the *Upgrades Expire On:* field. Make sure the version you want to upgrade to was released before this date. You can find this information by looking at the dates next to the version numbers in our [Version History](#)^[876].
- 3) Run the new version installer over your existing installation and choose *Existing Configurations* when prompted.

Note: Be sure to fully read the [Server Upgrades](#)^[81] section.

Change administrative control (especially in LDAP)?

Administrative Access can be given to individual users by an existing administrator. Just have an administrator go to **Admin>Users** and edit the account you would like to give administrative control to. On the **Editing** page, set the **Is Administrator** field to Yes. Administrative Access allows a user to access to all reviews, reports, and also edit any review.

The Special Administrator Account is a privileged account that is always allowed to login regardless of how many licenses are in use. With Internal Authentication, the special administrator account is always "admin". This cannot be changed.

With LDAP, there is one user assigned as the "System Administrator". If you would like to change this assignment, go to the ROOT.xml configuration file at `$INSTALLDIR/tomcat/conf/Catalina/localhost/ROOT.xml`. Near the bottom of that file is a line:

```
<Parameter description="The name of the Collaborator system
administrator who is always allowed to log in". name="system-
administrator" override="false" value="admin"/>
```

Change the value to the login name you would like to set the account to:

```
<Parameter description="The name of the Collaborator system
administrator who is always allowed to log in". name="system-
administrator" override="false" value="XXXXXXXXXXXX"/>
```

where XXXXXXXXXXXX is the login name of the System Administrator. Then stop and restart the service.

How do I view metrics and reports?

Collaborator provides built-in reports that allow you to view detailed metrics by [reviews](#)^[408], [defects](#)^[414], and [users](#)^[417]. To view these reports, you must have access to reports by enabling the [Reports Access](#)^[175] setting in the **Admin** menu. Once you have access, you may view built-in reports by clicking the **Reports** button that will appear at the top right menu of the Collaborator screen.

Collect data from each review participant?

[Participant Custom Fields](#)^[236] allow administrators to collect data. To learn about enabling and utilizing this feature, please view our blog post [here](#).

Find metrics for non-text documents?

Additional metrics for binary files, such as images and PDFs, can be viewed in v6.0 and newer. To view these metrics for a single review, visit the [Reports](#)^[407] section (provided you have access) and view a [Review Detail Report](#)^[408]. Our blog post [here](#) includes a helpful view of the new metrics to look for.

Many of our customers use our [custom reporting](#)^[806] features to obtain reports tailored to their needs. Learn how to create custom SQL reports [here](#)^[816] or learn about our database schema [here](#)^[807].

Define groups of users?

You can either set up user groups manually or by syncing them automatically to externally defined groups.

To set up user groups manually, view our owner's manual [here](#)^[215].

To learn how to sync, view the Group page [here](#)^[220].

We have also provided some examples of how to use groups that may help you in deciding how to fully utilize this feature [here](#)^[214].

1.7 Contact Us

If you have questions, problems or just need help with Collaborator, you can either contact our Support Teams or try to search for the needed information using the help resources located on our web site (forums, blogs, technical papers).

Contacting the Support Team

Chat With Us (for Trial users only)

To help trial users have a better experience of using Collaborator and solve common issues, the trial version of Collaborator includes a built-in chat. You can use the chat to contact our team directly from the product. To ask for assistance, click the Chat button in the bottom-right corner of Collaborator Web Interface and enter your question. You will get a response from our Customer Care team.

▼ Review #1: Untitled Review

CURRENT STATE: NEWLY ASSIGNED **ANNOTATING**

2 Participants 0 Files
0 Chats 0 Defects **EDIT**

Review Title: Untitled Review
Role: Author
Created: on 2018-04-06 at 14:40 by John Smith
Template: Default
Completed On: N/A
Restrict Access: Anyone
Restrict Uploads/Deletions: No
Overview

▼ Participants

Group by None JIRA Ticket All iCal All

Name	Role	State	Action
John Smith	Author	Active	✉ ✨ +123456
Clive Sinclair	Reviewer	Active	✉ ✨

Hi there! How can we help you?
Leave a message...

Leave a Request on the Website

If you are having issues with Collaborator and need technical assistance, open the Contact Support Form on our web site and fill in the required fields:

<https://support.smartbear.com/message/?prod=Collaborator>

The Support team will answer you via email. All further communication will be made via email. However, to start a conversation, please use the Contact Support Form on our web site.

For information on our support policies, please visit our web site <http://support.smartbear.com/about>.

More Resources

- To get acquainted with the product faster, watch **video tutorials** and **screencasts** on our web site:
<http://support.smartbear.com/screencasts/collaborator/>
- You can ask questions, search for answers, exchange comments and suggestions on our **forums**:
<http://community.smartbear.com>
- Learn more about using Collaborator from **technical papers** and **blogs** published at:
<http://support.smartbear.com/articles/collaborator/>
<http://blog.smartbear.com>
- Make sure you regularly visit our web site, <http://smartbear.com>, where you will find -
 - [News](#)

- [Downloads](#)
- [Articles, Case Studies, Webinars](#)
- [Updated support options](#)

1.8 Copyright Notice

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Collaborator includes third-party open source software modules that are subject to their respective licenses. A list of third-party open source software and their licenses is available on [our website](#).

2 Getting Started

This section will briefly guide you through the steps of getting started with Collaborator. It is intended for users who want to jump right into Collaborator and start using the basic features. If you would like more detailed instructions on how to use Collaborator, please visit the appropriate sections of this manual.

We have divided this section into several guides.

The [Getting Started For System Administrators](#)  shows you how to install and configure the Collaborator server.

The [Getting Started For Developers](#)  describes how to work with Collaborator as a regular user. It consists of three stages:

- [Creating Reviews](#) ⁴² tells how to create reviews as an author.
- [Participating in Reviews](#) ⁴⁸ tells how to take part in reviews as a reviewer or observer.
- [Reworking Defects](#) ⁵³ tells how to get notified about the defects found by other participants and how to make corrections to your reviews.

2.1 Getting Started For System Administrators

In order to use Collaborator, you must first install and configure the server side of the Collaborator.

1. Download the Collaborator Server

Navigate to SmartBear Downloads Center: <http://support.smartbear.com/downloads/collaborator/> and download the "Server Installer" that corresponds to a platform of your server.

2. Install the Collaborator Server

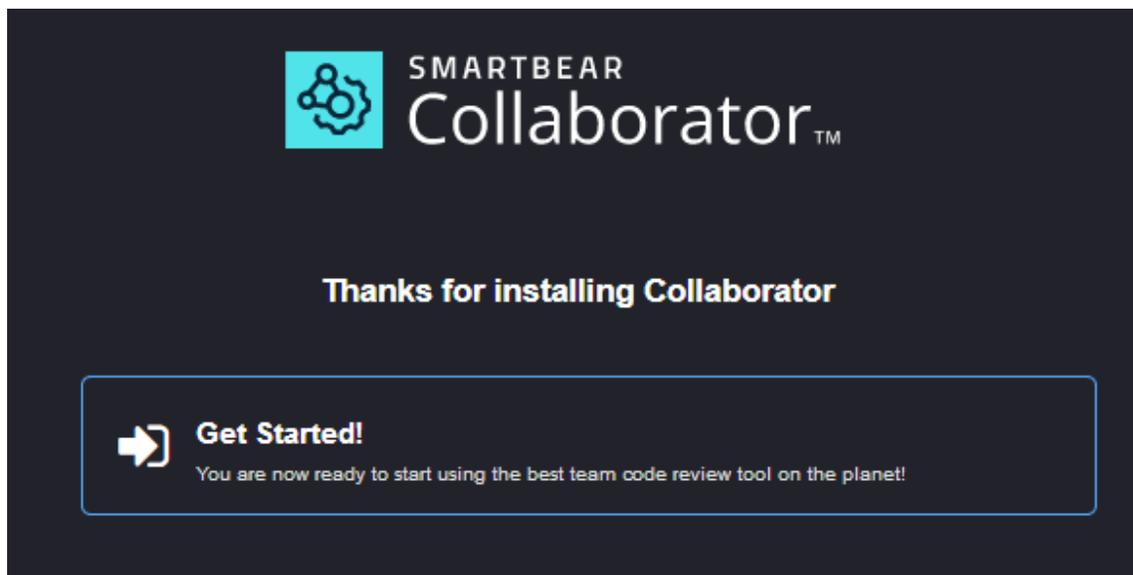
Launch server installer and [go through the wizard](#) ⁶⁸ to complete the installation.

Note: During the installation you may configure advanced settings for the Collaborator server: server port, authentication type, database type and so on. For first-time and evaluation installations we suggest that you leave the default values for these settings.

Once the installation is finished, your default browser will start and open the Collaborator's Web User Interface. The rest of the configuration and administration process is done using the Web User Interface.

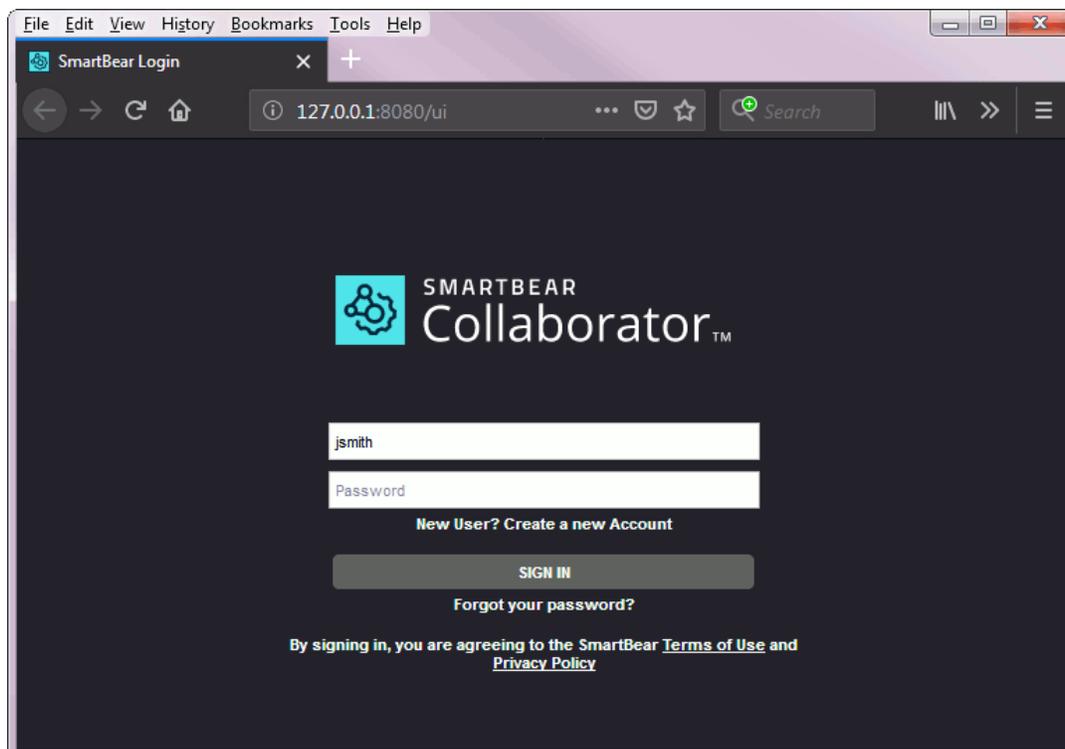
3. Initialize Database

When opening the Web User Interface for the first time after installing the Collaborator server, the database initialization screen is displayed. Click **Get Started** to continue.



4. Log Into the Web User Interface Client

If you have chosen the default values for advanced settings or chosen "InternalAuthentication" during the installation process, then specify the same username and password that you have provided during the installation. Click **Login**.



If you have chosen the "LDAP Authentication" during the installation process, then specify the same username and password that you have provided when configuring your LDAP integration. Please see [LDAP Authentication](#)^[106] for more information.

5. Perform First-Run Initialization

Once you have logged in as the admin, you will be redirected to the First-Run Initialization page. This page is displayed only once after the installation and asks you to provide necessary information to set up the Collaborator server.

In the Product Initialization section you will need to choose which product you would like to use: Collaborator Community, Collaborator Team or Collaborator Enterprise.



SMARTBEAR Collaborator™

Product Initialization

 Collaborator Enterprise All supported authentication and databases; Supports teams throughout the enterprise; Full support. Trial license	 Collaborator Team Integrated or LDAP/AD authentication with integrated database or MySQL; Supports teams of 25 or fewer; Full support. Trial license
 Collaborator Community Integrated authentication and database; Supports teams of 10 or fewer; Community support; Free license	

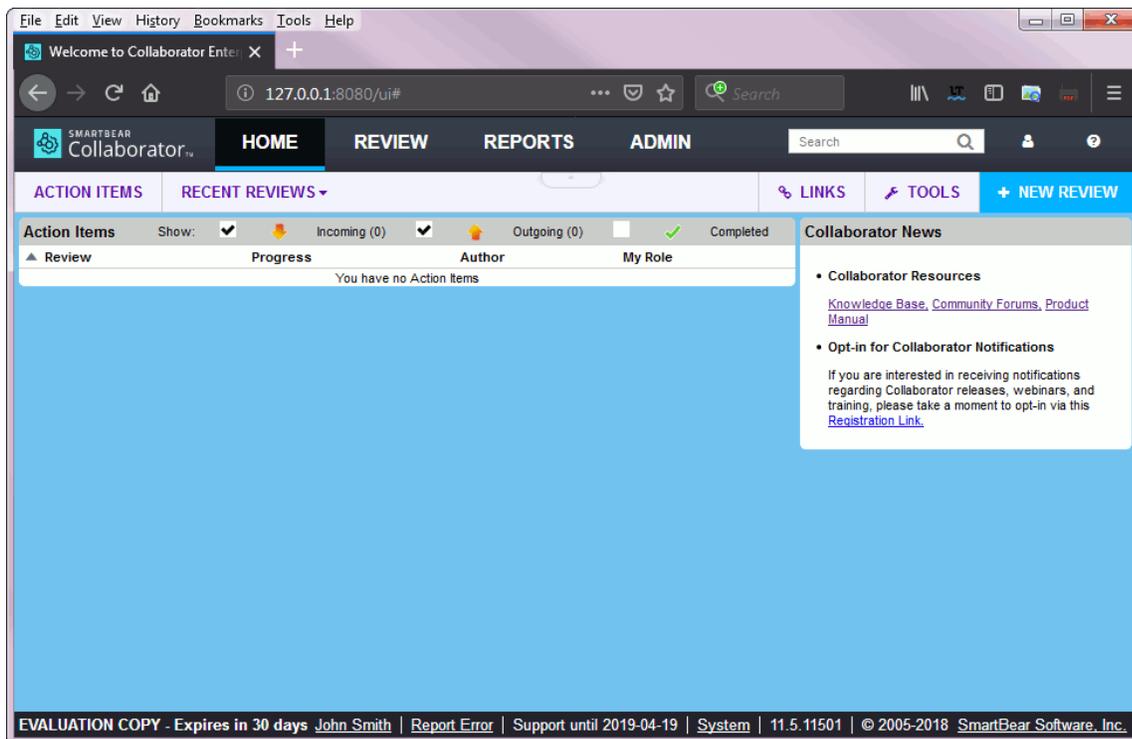
All products have the same goal, to make your peer review process easier and more effective, but provide different sets of features. Collaborator Community is intended for small developer groups, Collaborator Team is for medium groups and Collaborator Enterprise is for large enterprise level companies. To view all differences between Collaborator editions, please read [this page](#)^[3].

Note: Depending on certain features that were chosen during the [installation](#)^[8], the Product Initialization section may show a smaller set of available products. For example, if Oracle database was selected during the installation, then only Collaborator Enterprise will be available.

6. Get Familiar With Web Client Home Page

After the first-run initialization, you are redirected to the Home page. This will be the starting page for administrating and working with Collaborator. Later on, after logging in you will start your work with Collaborator from the Home page.

This page looks much the same as your average Collaborator user's home page. For the administrators the page additionally displays the Admin section on the top toolbar, the System link in page footer.



As the Collaborator administrator, you would like to familiarize yourself with the administration settings, so click the **Admin** section in header menu.

7. Configure Site-Wide Administration Settings

The Site-Wide Administration Settings section is where you can configure the settings of your Collaborator server.

Site-Wide Administration

System

Settings | Display | Access Restrictions | Review Process | Electronic Signatures | SSO | Bug-Tracking Integration | External Clients | File Types

System

External URL: **TEST**

URL to the main page of this web server as seen by external clients.
Used everywhere from notification emails to reporting.

SAVE **REVERT**

System-wide Message

System Message:

Message to be displayed throughout the system.

SAVE **REVERT**

Extra Home Page Links

Name:

Extra Dashboard Links:

API Lifecycle - <https://smartbear.com/product/ready-api/overview/>
 Software Testing - <https://smartbear.com/products/software-testing-tools/>
 Monitoring - <https://smartbear.com/product/alerts/qa/overview/>
 Code Optimization - <https://smartbear.com/product/qa/qa-time-pro/overview/>
 ALM - <https://cacomplete.com/>

Please follow the format: LinkTitle - link

SAVE **REVERT**

Fun Facts

Show System Fun Facts:

On the user's home page, should automatic system-generated fun facts be included in the rotation?
 If this is hidden and there are no custom fun facts, the "Fun Facts" feature will be completely disabled.

Extra Fun Facts:

Additional "Fun Fact" text to include in the rotation, one fact per line.

SAVE **REVERT**

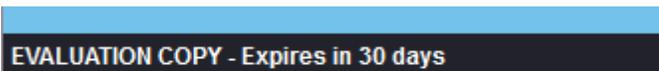
The administration settings are grouped into a number of categories: General, Users, Groups and so on. You can read the detailed description of each setting in the [Collaborator Settings](#)¹⁶⁷ section.

When configuring a Collaborator server for the first time, pay your attention to the following settings from the System category:

- *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.
- *Display | Global "Create User"* When you are starting out, and you do not 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* – 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. See [Bug-Tracking Integration](#)⁷⁸⁶ for more information.

8. Activate Your Licence

If you have an external internet connection, Collaborator will attempt to contact our licensing server so that we can automatically set you up with a **30-day trial license**. Your licensing status is displayed in the bottom-left side of home page footer.



If you do not have an external connection, or if a firewall prevents access to our licensing server, you need to obtain a license code manually.

If you want to obtain and enter a **permanent license code**, you can follow the same instructions.

Click **Licensing** category of the Admin section.

This will open a page that gives you information regarding the licensing, such as when the license expires, when the support and upgrades expire, how many seats you have and so forth.

 A screenshot of a web application interface. At the top, there are two tabs: "Current License" (selected) and "Configuration". Below the tabs is a section titled "Current License" with a light blue background. It contains the following information:

- Product:** Collaborator Enterprise
- Seats:** 50 fixed-seat licenses purchased. Currently using 1 seats.
- Seats Expire On:** 2018-05-05 00:00:00 UTC
- Upgrades Expire On:** 2018-05-05 00:00:00 UTC
- Node ID:** A text field containing an 8-character alphanumeric string, highlighted with a red box.
- Company Key:** trial
- Users Denied Access:** 0 users denied access in last 30 days.

Find the "Node ID" field in the "Current License" pane. The Node ID is an 8-character value that is unique to every installation. Node ID is tied to every license code we generate.

Copy an 8-character value of Node ID and send it 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.

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**.

Current License Configuration

Configuration

Company Key:
Company key supplied by SmartBear after purchase.
Leave blank for trials.

License Codes:

The complete list of license codes provided to you by SmartBear.
This will be the same list for all of your server installations.

UPDATE FROM SMARTBEAR
If your server has an external Internet connection, you may press this to request updated licenses directly from SmartBear

SAVE

That is all. Collaborator server is installed, configured and ready for operation.

Where to Go Next

To get detailed information about the server, its configuration and maintenance, read [Server Administration](#)^[56] section.

To learn how to upgrade an existing Collaborator server, read [Server Upgrades](#)^[81] section.

To learn about using Collaborator in a daily work, see [Getting Started For Developers](#)^[41] and [Web User's Guide](#)^[287] sections.

2.2 Getting Started For Developers

Peer review process includes three major types of activity: creating reviews as an author, participating in someone else's reviews as a reviewer or observer and improving your work according to comments and defects found by another participants.

This guide explains how to use Collaborator for to perform all these steps.

- [Creating Reviews](#)^[42]
- [Participating in Reviews](#)^[48]
- [Reworking Defects](#)^[53]

These guides assume that your Collaborator server has already been [installed and configured](#)^[35] by your system administrator.

2.2.1 Creating Reviews

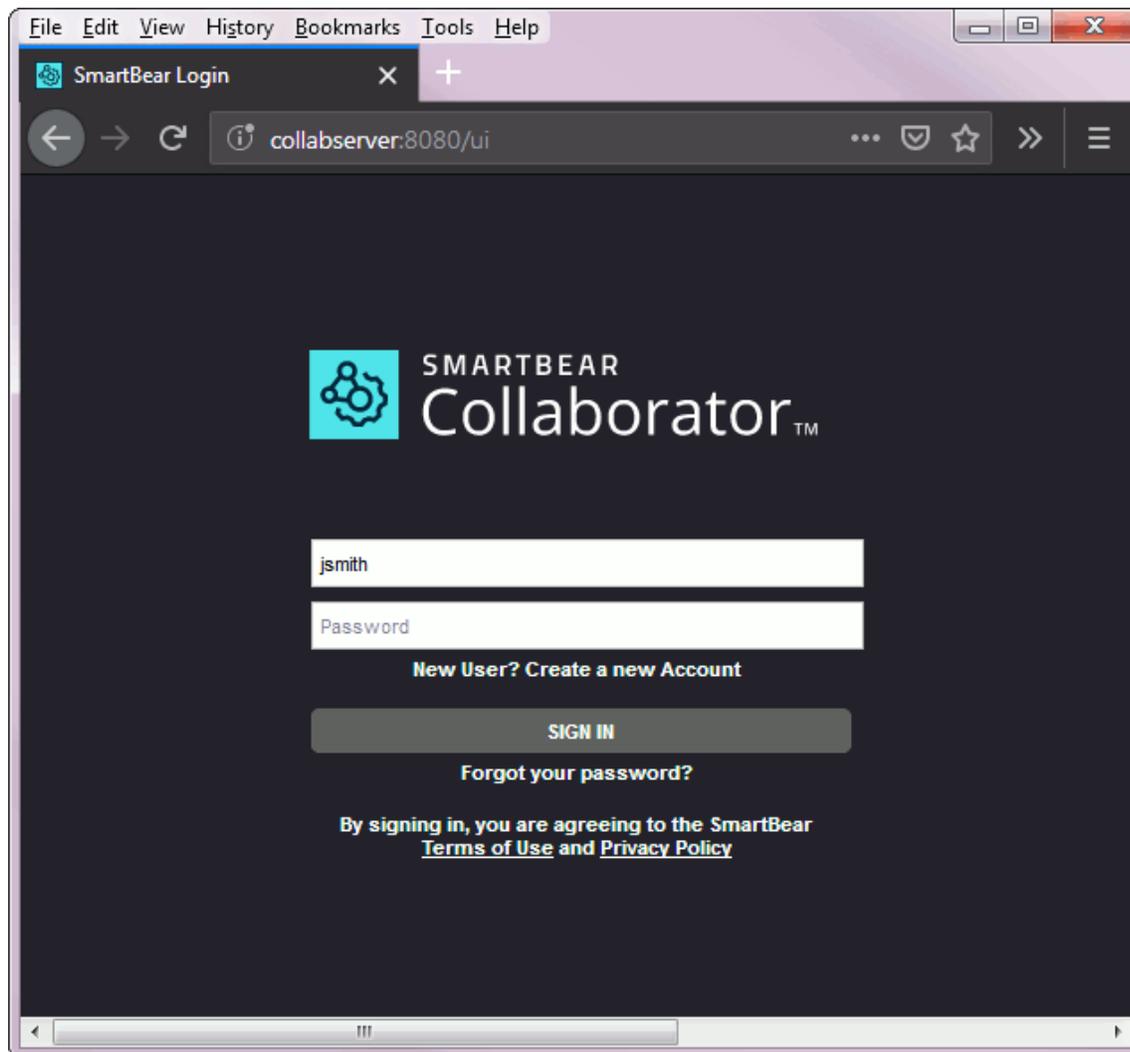
You have several options for creating a review: via Collaborator Web Client, via GUI Client or via Command-Line Client. Besides you can create reviews directly from Eclipse, Visual Studio or from P4V or P4Win clients for Perforce. To ease you into the process, we will start with the [Web Client](#) ¹⁶⁹. It does not need any client components except for web browser.

1. Open Collaborator Web client

Start your favorite web browser and navigate to the URL of the Collaborator Web Client. If you do not know the URL, ask your Collaborator administrator. The URL is defined by the [External URL](#) ¹⁶⁹ setting.

2. Log into Web client

You will be redirected to the login screen.



Enter your user name and password and click **Login**. The username and password is typically supplied by the administrator²⁰⁶.

If you use LDAP or ActiveDirectory¹⁰⁶ for authentication in your company, you can use that username/password with Collaborator and it will automatically create your user account.

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. In this case we recommend that your account in Collaborator be identical to your version control system account.

3. Get familiar with Home page

Once you log in, you will be redirected to the Home page. This page is a starting point for most of peer review process.

The screenshot shows the Collaborator Web Client Home Page. The navigation bar includes 'HOME', 'REVIEW', and 'REPORTS'. The main content area is divided into several sections:

- Navigation:** 'ACTION ITEMS', 'RECENT REVIEWS', 'LINKS', 'TOOLS', and '+ NEW REVIEW'.
- Action Items:** A table with columns: Review, Progress, Author, My Role, Deadline.

Review	Progress	Author	My Role	Deadline
Review #14175: "Review description of Oracle search settings" (overdue)	Waiting for comments	John Smith	Author	2019-02-10
Review #14400: "Github pull request #1506. (add) COLLAB-4725. Problem: new client can't clearly understand what..." (overdue)	Perform	Clive Sinclair	Stakeholder	2019-05-18
Review #14493: "Github pull request #1560. COLLAB-4255 (fixed) Display LOC differences the same way it is displa..." (due today)	Perform	Hector Patton	Stakeholder	2019-06-27
Review #14499: "Github pull request #1566. (fixed) COLLAB-5717 Moved back s erver url to review url for emails" (due in 1 day)	Perform	Lynn Carr	Stakeholder	2019-06-28
Review #14502: "Licensing Staff" (due in 1 day)	Annotate Review	Hector Patton	Stakeholder	2019-06-28
Review #14505: "What's New in 12.0" (due in 1 day)	Waiting for comments	John Smith	Author	2019-06-28
- Fun Fact:** 08-18-17
- Collaborator News:**
 - Opt-in for Collaborator Notifications
 - Collaborator 11.5.11503 Is Now Available
 - Collaborator Resources

Footer: EVALUATION COPY - Expires in 162 days | John Smith | Report Error | Support until 2019-12-06 | System | 12.0.12000 | © 2005-2018 SmartBear Software, Inc.

Collaborator Web Client Home Page

On Home page you can check your [Action Items](#)³⁰⁷ to see if you have any assigned reviews. You can also edit and change your settings and preferences by clicking [Settings](#)²⁹⁷ in the menu bar on the top right of the screen.

4. Create a new review

To create a new review, click **New Review** on the Home screen.

The close-up screenshot shows the navigation bar with a search box, user profile icon, and help icon. The 'NEW REVIEW' button is highlighted with a red box. Below the navigation bar, the 'Collaborator News' section is visible, showing 'My Role' as 'Author' and 'Collaborator Resources' with links to 'Knowledge Base', 'Community Forums', and 'Product Manual'.

You will see a [Create Review Screen](#)³⁰⁹ where you can specify information about the newly created review.

5. Specify general information about a review

Review #3: Verify foo function

YOU ARE NOT A PARTICIPANT IN THIS REVIEW. **PLANNING** 0 Participants 0 Files 0 Chats 0 Defects **DONE EDITING**

Review Title: Verify foo function

Role: (not participating)

Created: on 2018-04-18 at 16:50 by John Smith

Group: All Users

Template: Default

Deadline: 2018-04-25

Completed On: N/A

Restrict Access: Anyone

Restrict Uploads/Deletions:

Overview: Please check my implementation of foo function.

Enter a brief description for the review to the **Review Title** field. The title is used all over the place -- in Action Items, in notification emails, in web page titles, and so forth.

All other fields of the General Information section are optional, so you may skip them.

6. Add review participants

The next step in creating a review is to invite people to the review, and give each of them a role to play.

Participants

Add Myself As: Author Reviewer Observer

Add a New Participant: Filter by: All Users Participant: Type to filter Role: Reviewer **ADD**

Recent Participants: Clive Sinclair (Reviewer)

Group by None JIRA Ticket All iCal All Email All Poke All

Name	Role	State	Action	Remove
John Smith	Author	Active	[Email] [Phone] +13264655	✗
Clive Sinclair	Reviewer	Active	[Email] [Phone]	✗

1. Add yourself as Author^[253].
2. Add one or more of your colleagues as Reviewers^[253].

You can select each user and role individually through the drop-down menu, or start typing the name of the user in the appropriate field to narrow down the user list. User/role combinations you have used recently will also appear under "Recent Participants". This makes it easy and fast to select common combinations.

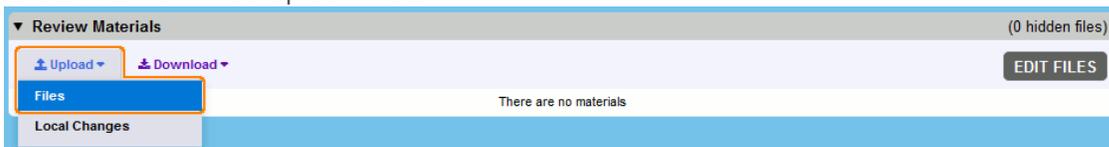
7. Add review materials

Review materials is what you are asking to review. From the Web Client you can upload the following types of content:

- Arbitrary files from your computer: text files^[351], word processing documents^[355], spreadsheets^[359], presentations^[363], PDF documents^[372], Visio graphics^[366], images^[369] and so on.
- Changes committed to a pre-configured^[194] version control system

Let's upload some text file to a review.

1. Scroll to the Review Materials section.
2. Click the **Upload** button.
3. Select **Files** from the drop-down list.



4. In the ensuing dialog, choose one or more files you want to attach and then click **Upload**.

Tip: Alternatively, you may just drag your local files and drop them to review web page.

Once you have attached anything to a review, it will be listed in the Review Materials section.



Most Collaborator users do not use the Web Client for attaching source files, reserving it for adding supporting documents. Instead, most of our users opt to use the GUI Client, the Command-Line Client, or add source files directly from Eclipse, Visual Studio or from P4V or P4Win clients for Perforce.

These clients need to be installed on your computer and properly configured, however they provide an extensive integration with Source Control Systems and/or IDEs.

To learn how to add review materials via these clients, please read the respective sections in the manual: [GUI Client](#)^[435], [Command-Line Client](#)^[445], [Eclipse Plug-in](#)^[464], [Visual Studio Plug-in](#)^[503] or [P4V / P4Win Integration](#)^[699].

8. Start the review

Click **Inspect** button in Review Summary screen header to start a review.

Alternatively, you can click **Annotate** button to apply the current changes, and proceed to optional Annotating phase. In this phase all participants that you have added will be notified about this review and will be invited to add their comments and review materials. The review will not begin until you select the **Inspect** button.



Other participants will receive notifications about your new review, and it will be displayed in their [Action Items](#)^[307] list.

Where to Go Next

To learn how to take part in someone else's reviews as a reviewer or observer, see [Participating in Reviews](#)^[48].

To learn how to get to know about the issues other participants have found in your review, see [Reworking Defects](#)^[53].

2.2.2 Participating in Reviews

When someone invites you to a review, you receive an email notification. To take part in this review you need to open Collaborator Web Client.

1. Log into the Web Client

Start your favorite web browser and navigate to Collaborator Web Client URL. If asked, enter your user name and password in the login screen.

In the Action items list on the Home screen, you will see a new incoming review.

The screenshot shows the SMARTBEAR Collaborator web client interface. The top navigation bar includes 'HOME', 'REVIEW', 'REPORTS', and 'ADMIN'. Below this is a search bar and user profile icons. The main content area is divided into 'ACTION ITEMS' and 'RECENT REVIEWS'. The 'ACTION ITEMS' section shows a table with columns for 'Review', 'Progress', 'Author', 'My Role', and 'Deadline'. A single review is listed: 'Review #3: "Verify foo function"' with progress 'Perform', author 'John Smith', role 'Reviewer', and deadline '4/25/18'. The 'RECENT REVIEWS' section is currently empty. On the right, the 'Collaborator News' sidebar contains sections for 'Collaborator Resources' (with links to Knowledge Base, Community Forums, and Product Manual) and 'Opt-in for Collaborator Notifications' (with a Registration Link).

Review	Progress	Author	My Role	Deadline
Review #3: "Verify foo function"	Perform	John Smith	Reviewer	4/25/18

2. Open Review Summary screen

Click the review in the Action items list to open it in the [Review Summary](#)^[316] screen where you can see the details about this review.

The screenshot shows the Jira Review interface for a review titled "Verify foo function". The review is currently in the "INSPECTION" phase, which is highlighted in blue. The current state is "ACTIVE PARTICIPANT". The review has 2 participants, 1 file, 0 chats, and 0 defects. The review was created on 2018-04-18 at 16:50 by John Smith. The review title is "Verify foo function", the role is "Reviewer", and the group is "All Users". The template is "Default" and the deadline is "2018-04-25". The review is not completed, and access is restricted to "Anyone". The overview text is "Please check my implementation of foo function." Below the overview, there is a "Participants" section with a table of participants and buttons for "JIRA Ticket All", "iCal All", "Email All", "Poke All", and "EDIT".

Name	Role	State	Action
John Smith	Author	Waiting	[Email] [Poke] +13264655
Clive Sinclair	Reviewer	Active	[Email] [Poke]

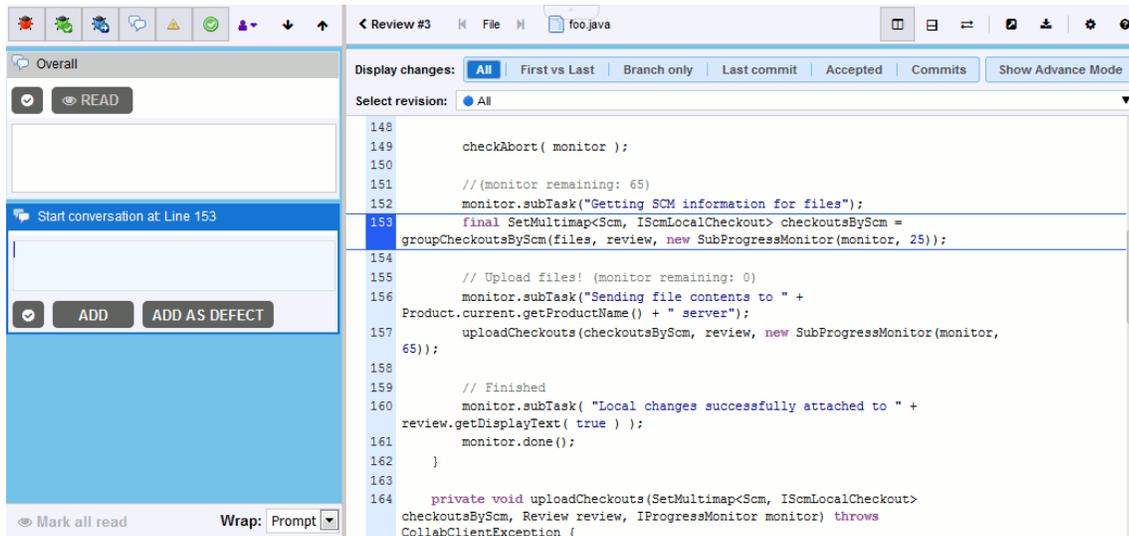
Notice that you are the active participant of this review and the review is in the Inspection phase.

3. Inspect review materials

Scroll to the Review Materials section (or click **Materials** in the toolbar) and click the uploaded file (or the first of several uploaded files). The [Diff Viewer](#)³³⁹ will open.

Diff Viewer displays the contents of the chosen file and allows to add your comments and defects on this file. The Viewer appearance changes a little depending on a type of the current file.

If a version history is available for the file (for example, when it was added from a source control system or when it was reworked by the author), the Diff Viewer shows the current and previous versions of the file and highlights the differences between them.

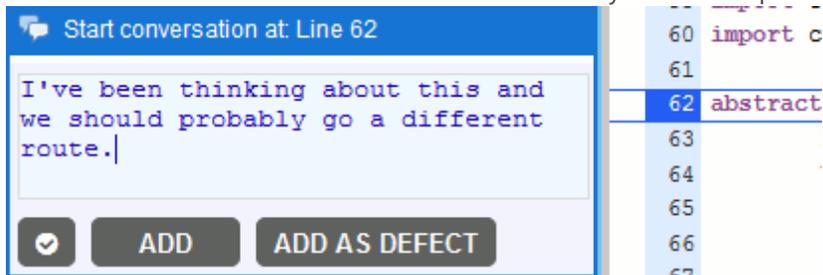


4. Add your comments, look for and verify defects

While reviewing, you most likely find some issues with the materials or would like to ask or tell something to the author. For this purpose you can add comments and defects.

If you are reviewing a file that has already been reworked, then you will need to verify whether the defects have been fixed.

- To add a comment, click on the line (in source code and text files), cell (in spreadsheets) or area (in documents and images) you want to comment on, type your comment and click **Add**. Comments are threaded into a conversation that stays tied to a specific line, cell or area.



- To add a defect, click on the line, cell or area to which you want to attribute the defect, enter issue description and click **Add as defect**. In the ensuing pane specify defect severity level and type and click **Add defect**.

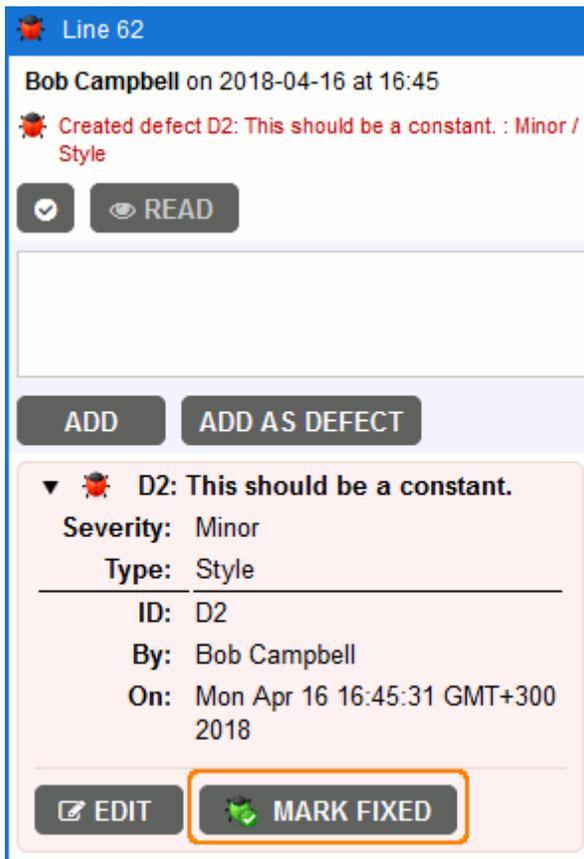
The screenshot illustrates the process of adding a defect in a software review tool. It is divided into two main panels over a code editor background.

Top Panel: "Start conversation at: Line 62"
This panel contains a text input field with the text "This should be a constant.". Below the input field, there is a preview of the text. Underneath the preview, there are two dropdown menus: "Severity:" set to "Minor" and "Type:" set to "Style". At the bottom of this panel are two buttons: "ADD DEFECT" and "CANCEL".

Bottom Panel: "Line 62"
This panel shows the defect being added to a specific line of code. It features a header "Line 62" with a bug icon. Below the header, it displays the user "Bob Campbell" and the timestamp "on 2018-04-16 at 16:45". A red bug icon is followed by the text "Created defect D2: This should be a constant. : Minor / Style". There are two buttons: a checkmark icon and a "READ" button. Below this is a large empty text area. At the bottom, there are two buttons: "ADD" and "ADD AS DEFECT". A red bar at the very bottom shows a play icon, a bug icon, and the text "D2: This should be a constant.".

The background shows a code editor with line numbers 59 through 73. Line 62 is highlighted in blue, indicating the location of the defect.

- To mark a previously found defect as fixed, scroll to the defect, expand its log and press **Mark fixed**.



Besides creating comments and defects that relate to a specific line or area you can also create comments and defects that relate to entire files (in the Overall section of Diff Viewer) as well as comments and defects that relate to the whole review (in the Chat section of the Review Summary screen). See [Review Chats](#)³⁸⁵ for more information on making conversation during reviews.

When you have examined the current file, you can proceed to another file that was uploaded to the review (if any). To view the next or previous files, you may use the File navigation buttons on the [Diff Viewer toolbar](#)³⁴²:



Having inspected all the files that were uploaded to the review, return back to the Review Summary screen.

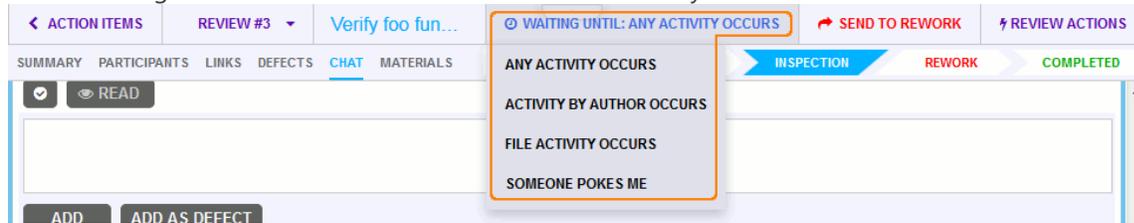
To return back to Review Summary screen, click a button with review number (Review #2 in image above) on the Diff Viewer toolbar.

5. Finish inspection

In Review Summary screen header you can find several review action buttons: Wait, Send to rework, (or Send to completed) and so on.

- To signal other participants that you have temporarily stepped out from the review but plan to return, press **Wait**.

In the ensuing list select when Collaborator should re-invite you to the review.



Wait Options

- To indicate that you have found some defects that need to be fixed, press **Send to Rework**. This will change the review phase to Rework and return it back to author so that he can fix the found defects.



- To indicate that you approve the changes in the uploaded materials, press **Send to Completed**. When all participants approve the review it will be closed.



A review cannot be closed until all its defects are resolved: either marked as fixed, deleted, or tracked externally³⁹⁶.

Where to Go Next

To learn how about correcting the found defects as an author, see [Reworking Defects](#)⁵³.

2.2.3 Reworking Defects

When one of review participants has noticed some issues with your work and created defects, the review is returned back to you.

1. Log into the Web Client

Start your favorite web browser and navigate to Collaborator Web Client URL. If asked, enter your user name and password in the login screen.

In the Action Items list on the Home screen, you will see your review that was returned. It will have the "Rework defects" state. You will need to fix the defects found by other participants.

The screenshot shows the SmartBear Collaborator interface. The top navigation bar includes HOME, REVIEW, REPORTS, and ADMIN. Below the navigation, there are tabs for ACTION ITEMS and RECENT REVIEWS. A table lists reviews with columns for Review, Progress, Author, My Role, and Deadline. Review #3, "Verify foo function", is highlighted with an orange border. To the right, there is a Fun Fact and Collaborator News section.

Review	Progress	Author	My Role	Deadline
Review #1: "COLLAB-3987 Fixed Admin Message"	Waiting for comments	John Smith	Author	
Review #2: "Document Review"	Waiting for comments	John Smith	Author	4/26/18
Review #3: "Verify foo function"	Rework defects	John Smith	Author	4/25/18
Review #4: "Fix COLLAB-4047 - IE 11: Unable to capture debug log"	Finish creating	John Smith	Author	5/2/18

2. Open defect log of the Review Summary screen

Click the review to open the Review Summary screen and scroll to the Defect Log section (or just click Defects in review toolbar).

The screenshot shows the SmartBear Collaborator interface for a specific review. The top navigation bar includes HOME, REVIEW, REPORTS, and ADMIN. Below the navigation, there are tabs for ACTION ITEMS, REVIEW #3, and Verify foo function. The Defect Log section is expanded, showing a table of defects. Below the Defect Log, there is a Chat section and a Review Materials section with an Upload and Download button. The Review Materials section shows a list of uploaded files, including 'foo.java'.

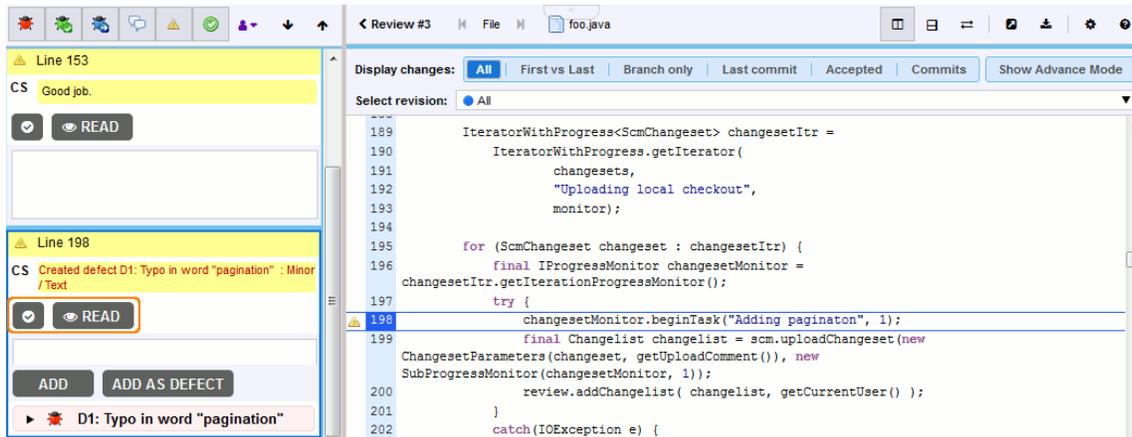
State	ID	Author	Date	Location	Origin	Text	Severity	Type
Open	1	Clive Sinclair	2018-04-19	foo.java, Line 198	foo.java, Line 198	Typo in word "pagination"	Minor	Text

This section lists all found defects, their location and description. The Review Materials section also displays information about defects and comments, however groups it per files.

3. Get information about a particular defect

Click the Location link in the Defect Log or in the Review Materials sections.

This will open the Diff Viewer and navigate to the defect.



Read descriptions of the defects and reviewer comments. Reply if needed.

To denote that you agree with the defect or comment, press **Mark Accepted**. To indicate that you have read the comment or defect description, press **Read**.

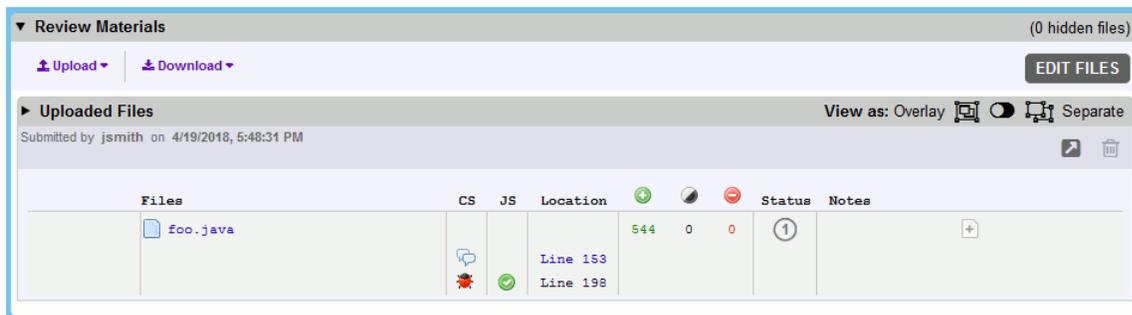
When you have examined the current file, you can proceed to another file (if any). To view the next or previous files, you may use the File navigation buttons on the Diff Viewer toolbar:



To return back to Review Summary screen, click a button with review number (Review #2 in image above) on the Diff Viewer toolbar.

4. Upload the reworked files

Correct the defects on your computer and then upload the corrected version of the file(s) to the review.



The Status column in the Review Materials for the uploaded file will increase to indicate that the files was reworked.

5. Request to verify your corrections

When you have uploaded the corrected versions for all files, press **Inspect** button in Review Summary screen header. Other review participants will be notified that you have reworked the review materials and want them to verify your changes.

A review can go through multiple inspection and rework phases before it is completed.

3 Collaborator Server

This chapter describes how to setup and manage the server component of Collaborator. It is useful for system administrators. Regular users of Collaborator should refer to [Web Client](#)^[286] or [Desktop Clients](#)^[423] sections instead.

Collaborator server process acts as the hub, manager, and controller of information. The server has a web-based user interface where users and administrators can do everything — create and perform reviews, configure personal and system-wide settings and run reports. The server uses a database to store all data and configuration.

In This Section

- [Installation](#)^[56]
Covers different aspects of server and database installation, backup and upgrade.
- [Server Administration](#)^[86]
Covers different aspects of server management and administration.
- [Collaborator Settings](#)^[167]
Describes how to configure the Collaborator server.

Related Topics of Interest

- [Web Client](#)^[286]
Describes the web user interface of Collaborator.
- [Desktop Clients](#)^[423]
Describes GUI Client, Command-Line Client, plugins for Eclipse, Microsoft Visual Studio and other clients for desktops.

3.1 Installation

This chapter covers different aspects of server and database installation, backup and upgrade.

In This Section

- [System Requirements](#)^[57]
Describes the minimum and recommended requirements to install and run Collaborator server.
- [Database Installation and Configuration](#)^[59]
Explains how to install and prepare different databases to work with Collaborator.
- [Server Installation](#)^[68]
Explains how to install Collaborator server.
- [Server Upgrades](#)^[81]
Explains how to upgrade an existing Collaborator server.
- [Platform-Specific Notes](#)^[84]
Contains additional server-related information that is specific to certain operating systems.

3.1.1 System Requirements

This section describes the minimum and recommended requirements to install and run Collaborator server, as well as some steps that it is prudent to take before attempting to install Collaborator. Running Collaborator server in a VM environment is not recommended, since it cannot guarantee suitable performance due to resource contention.

Server Requirements

Please ensure that you meet or exceed the following requirements to run the current version of Collaborator server.

Configuration for servers with 20 or fewer concurrent users:

- Modern processor with 2 cores, 2.5Ghz or better. 64-bit platform is required for [document reviews](#)^[339].
- 4GB free RAM
- 100GB free storage space
- Java: OpenJDK 11 or later (recommended), or Oracle JRE/JDK 8, 9, or 11. See [Java Compatibility Matrix](#)^[1102] for more details.
- Windows, Linux, Solaris or BSD
(If Windows, *must* be a server edition, not workstation edition) On Windows Server 2008, you need to install Oracle JRE beforehand.
On *nix platforms, you may need to install [Microsoft's TrueType core fonts](#) in order to render Web UI correctly.

- [Separate database server](#)^[59] is recommended. (Trial users may install on our embedded database.)

Configuration for servers with 50 or fewer concurrent users:

- Modern server class processors with at least 4 cores in total, 2.5Ghz or better. 64-bit platform is required for [document reviews](#)^[339].
- 12GB free RAM. We recommend increasing the memory available to Collaborator server (instructions [here](#)^[1100])
- 100GB free storage space
- Java: OpenJDK 11 or later (recommended), or Oracle JRE/JDK 8, 9, or 11. See [Java Compatibility Matrix](#)^[1102] for more details.
- Windows, Linux, or Solaris
(If Windows, *must* be a server edition, not workstation edition) On Windows Server 2008, you need to install Oracle JRE beforehand.
On *nix platforms, you may need to install [Microsoft's TrueType core fonts](#) in order to render Web UI correctly.
- [Separate database server](#)^[59] is required
- Low latency link to database server
- Access from all possible clients to server port without a proxy
- Some kind of drive backup hardware (Example: RAID 0)

For servers with greater than 50 concurrent users, please [contact our support team](#)^[32] so that they can help with your implementation plan.

Preparing your Collaborator server

- Install the latest stable build of supported Java version.
- Create a database user with permission to connect via TCP/IP from Collaborator server.
- Create an empty schema on database server in which aforementioned database user can create, alter, read, write, update, and delete tables.
- Make sure that you have access to your intended server port (default 8080) through any firewall you may use.

- If you intend to use LDAP or Active Directory for authentication, please review the [relevant section of our manual](#)^[106]. You may need to ask your LDAP or Active Directory administrator to create a dedicated user for the Collaborator server.

3.1.2 Database Installation

Collaborator supports several databases:

- **Embedded**^[89]. A zero-configuration embedded database useful for trials.
- **MySQL**^[60] versions 4.1, 5.0, 5.1, 5.4, 5.5, 5.6, 5.7, 8.0.
- **Microsoft SQL Server**^[83] versions 2008, 2012, 2014, 2016, 2017.
- **Oracle**^[88] versions 11gR2 and 12c.

For trials, the zero-configuration embedded database is the easiest way to get started. MySQL is the best choice if you need a free, open-source database.

Collaborator server must be able to access your database server via TCP/IP. Collaborator requires an empty schema on the database server in which a dedicated database user can create, alter, read, write, update, and delete objects.

A built-in [database migration tool](#)^[98] allows you to move between any of the supported databases, so you can always get started on one and switch to another later on.

Note: *MySQL database is supported in Collaborator Team and Collaborator Enterprise. Oracle and SQL Server databases are only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)*^[3]

For more about the database format, see [Database Schema](#)^[80].

3.1.2.1 Zero-Configuration

The server installer comes with support for the Hypersonic embedded database. As of version 8.2, we install the HSQL 2.2 database. This in-memory database is not only perfect for trials where you want to get up-and-running as easily as possible, it is also the recommended production-ready database and it performs automatic daily backups. There is no need to use SQL Server, Oracle or MySQL unless you have specific needs.

Using this database requires no configuration. When the [server installer](#)^[68] asks for the database type, simply select "Embedded".

If you find that the embedded database is not going to fit your needs, the [standard database migration technique](#)^[9] works with all databases, so it is possible to move all your data from the embedded database into a "real" database at any time. In addition to using the database migration technique, to move to a "real" database, you will also need to reconfigure the Collaborator server by running the [Server Installation program](#)^[10].

3.1.2.2 MySQL

[MySQL](#) is a popular enterprise-class, open-source database. This is your best choice if you need a free, open-source database.

Supported MySQL Versions

Collaborator supports MySQL versions 4.1, 5.0, 5.1, 5.4, 5.5, 5.6, 5.7, and 8.0.

Note: *MySQL database is supported in Collaborator Team and Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)*^[3]

Download MySQL Components

Required components

- [MySQL Community Server](#) - database server,
- [Connector/J](#) - database driver for Java platforms.

Optional components

- [MySQL Workbench](#) - GUI tool for graphical server administration. A GUI tool alternative to MySQL Command Line Client, which is a part of part of the database server.

For downloads and documentation for all platforms, see the [MySQL Developer Zone](#) web site.

Install and Configure Database

First, install the Database Server component. Once you have installed the server, the last screen will give you the option to Configure the MySQL Server. If you select this, it will open a new wizard for configuration. Two parts in the configuration that are especially important: Port Number and Root Password. You will need to know both while getting your database setup and while configuring Collaborator to work with your database. For information on configuring your database server, go to the [MySQL Documentation](#) and select your MySQL version.

- It is important to make sure you are using InnoDB tables. Using InnoDB tables will scale better for multiple users than MyISAM. For questions regarding configuring your MySQL database tables, see <https://dev.mysql.com/doc/refman/5.5/en/mysql-config-wizard-database-usage.html>.

- Collaborator does not support the non-default values of the `auto_increment_increment` and `auto_increment_offset` MySQL system variables.

For Collaborator, you have to create a separate database, since the MySQL Server install will not create a database for you. This is a manual step that you need to do.

You can create a database using the MySQL Command Line Client, or using MySQL Workbench. If you plan to use the MySQL GUI client, it is important to know that the MySQL GUI Tools Bundle is reaching end of life. The instructions given in this documentation use the functionality in the current GUI client, MySQL Workbench.

The steps below for creating a database were written using MySQL Workbench 5.2.16 and are subject to change. As always, the most reliable source for database creation steps is [MySQL Workbench Documentation](#).

1. Open MySQL Workbench.
2. Create a connection to your database server.
 - a) From the Home screen, under Server Administration, select New Server Instance.
 - b) Follow the steps in the New Server Instance Wizard.
3. Create the database.
 - a) Go back to the Home tab.
 - b) Under SQL Development, select the database server connection you provided in step 2.
 - c) In the Object Explorer, right-click and select Create Schema.
 - d) A screen will appear and prompt you to provide a schema name. Once you have done that, click Apply.
 - e) You will be shown the command used to create the schema, and given an option to edit it.
 - f) Once the create command is as you want it, click Apply.
 - g) You will be returned to the screen you saw in step 3d. Click Finish.

We recommend that you create a user specifically for your Collaborator database rather than using the super-user, root. To do this in MySQL Workbench, see the documentation at [MySQL Schema Privileges](#).

All of these changes go into effect immediately. You do not have to restart the MySQL server for changes to take effect.

When [installing](#) Collaborator on a server, the installation wizard will prompt for the MySQL server host name, TCP/IP port, database name, user name, password and path to JDBC driver. The installer will report any connectivity errors. When you visit the web page for Collaborator it will detect that you have a new database and will create all tables, indexes, and views for you automatically.

The following SQL script can be used to create a database and a database user for Collaborator and configure the required permissions for that user (be sure to change the database name, user login and password as appropriate):

```
CREATE DATABASE IF NOT EXISTS ccollabdb CHARACTER SET utf8 COLLATE
utf8_unicode_ci;
CREATE USER 'collabuser' IDENTIFIED BY 'password';
GRANT
ALTER,
CREATE,
CREATE TEMPORARY TABLES,
CREATE VIEW,
DELETE,
DROP,
EXECUTE,
INDEX,
INSERT,
LOCK TABLES,
SELECT,
UPDATE
ON TABLE ccollabdb.*
TO collabuser;
FLUSH PRIVILEGES;
```

MySQL Limitations

- MySQL 4.x does not support the concept of a database VIEW object. Therefore custom [reporting views](#)^[812] are only present with v5.x servers.
- **Important:** The MySQL native restore feature does not automatically clear the database before restoring from backup. You can use the MySQL native restore feature, but you **must** manually drop all tables in the database before you run the restore. By doing this, you will ensure an exact reproduction of your backed-up database. Option two is to use the [alternative method](#)^[96] provided by Collaborator.

3.1.2.3 SQL Server

Supported SQL Server Versions

Collaborator supports Microsoft SQL Server 2008, 2012, 2014, 2016 and 2017.

Note: *SQL Server is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)*^[3]

Download SQL Server Components

- [SQL Server](#) - database server,
- [SQL Server JDBC Driver](#) - database driver for Java platforms.

Install and Configure Database

You need to create an empty database for Collaborator. You can do this, for example, in SQL Server Management Studio.

When [installing](#)^[77] Collaborator on a server, the installation wizard will prompt for the SQL Server host name, TCP/IP port number, the database name, user name, password and path to JDBC driver. The wizard will report any connectivity errors.

When you log in to the Collaborator Web Client for the first time after installation, it detects that you have a new database and will create all tables, indexes, and views for you automatically.

Important notes:

- When creating the database, be sure to select a case insensitive collation so that the case of column names (and user names and text searches) does not matter.

- It is recommended that you create a user account just for Collaborator and give this account full access to Collaborator database and no access to other databases. Also, we recommend using a native SQL Server account authentication instead of Windows-based authentication, because the Collaborator service might not be running under a normal Windows-based login. SQL Server uses its native authentication by default, so no additional actions will be required. If you decide to use Windows-based authentication, you may need to change the Collaborator settings – [see below](#) ⁶⁴.
- Collaborator uses the TCP/IP protocol for data exchange. By default, in SQL Server this protocol is disabled. To enable it, open the SQL Server Configuration Manager and navigate to **Network Configuration > Protocols**. Make sure TCP/IP is enabled.
- By default, SQL Server is configured to use dynamic ports, which means that the port used is changed each time the service is restarted. To use a static port instead, open the TCP/IP settings and change the IPAll setting value. Empty the **TCP Dynamic Ports** box and specify the desired port number in **TCP Port**.

Use Windows Authentication

We recommend using a native SQL Server account authentication instead of Windows-based authentication, because the Collaborator service might not be running under a normal Windows-based login. However, if you want to use use Windows account, you may need to change the Collaborator connection settings:

1. After downloading the driver package from one of the links above, extract the files.
2. Copy the platform-specific sqljdbc_auth.dll to the tomcat subfolder of your <Collaborator installation folder>.
3. Open the following file in any text or XML editor --

```
<Collaborator installation folder>/tomcat/conf/Catalina/localhost/  
ROOT.xml
```

4. Insert the IntegratedSecurity=true value into the url attribute of the <Resource driverClassName="com.microsoft.sqlserver.jdbc.SQLServerDriver" ... > element that describes the JDBC configuration.

After the change, the element will look something like this --

```
<Resource driverClassName="com.microsoft.sqlserver.jdbc.  
SQLServerDriver" ...  
url="jdbc:sqlserver://SERVER:1433;databaseName=DATABASE-NAME;  
IntegratedSecurity=true" ...  
username="DOMAIN\USERNAME" validationQuery="select 1 ... " />
```

5. Restart the Collaborator service.

Troubleshooting

- If you get the error "The TCP/IP connection to the host has failed. java.net.UnknownHostException", you probably need to enable TCP/IP for your database. See [Setting Up the Database](#) ^[63] above.
- By default, when Collaborator is installed, the service runs under the Local System account. If you are using SQL Server authentication rather Windows-based authentication, the Local System account must have the permissions necessary to communicate with the database. An error like "Error: Login failed for user 'domain\user\$'". indicates that the Local System account does not have these permissions. To handle this situation, you can either grant your Local System account permissions to your database server, or edit the account the Collaborator service is using. To edit the account:
 - On your Collaborator server computer, from the **Control Panel > System and Security > Administrative Tools**, open **Services**.
 - Find **ccollab-server** in the service list and stop the service.
 - Right-click on ccollab-server, and select **Properties** from the context menu. This will open the Properties dialog
 - Go to the **Log On** tab.
 - Select **This account** and then specify the name and password for the account you want the Collaborator service to operate.

Note: The account that you specify must have sufficient privileges on the machine, where the service is running (for instance, file system privileges for folder creation to allow the service create temporary subfolders in the Collaborator server installation folder).
 - Click **Apply**.
 - Start the ccollab-server service.
- If you are using SQL Server with named instances, it is important to know your port configuration. By default, named instances use dynamic ports. This means, every time SQL Server is restarted, it will search for available ports and assign one to your database. In this situation, you might have trouble finding the port upon which your database is running and could see errors when trying to connect to your database with Collaborator.

Possible solutions:

- If you are using named instances with dynamic ports, do not specify a port when providing Collaborator your SQL Server connection information. By leaving the port unspecified, a request will be sent to your SQL Server instance on port 1434 that will search for the port your database is running on and will then send that information back to Collaborator.
- Alternatively, try using a static port. See [Setting Up the Database](#) ^[63] above.

3.1.2.4 Oracle

Supported Oracle Versions

Collaborator supports Oracle 11gR2 Personal Edition and 12c Standard Edition.

Note: Oracle database is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#).

Download Oracle Components

- [Oracle Database](#) - database server,
- [Oracle JDBC drivers](#) - database driver for Java platforms.

Install and Configure Database

Create a database for Collaborator. It is recommended that you also create a username/password pair just for Collaborator and give this account full access to the database and no access to other databases.

Install the CTX_DDL PL/SQL package on your DB server and grant the EXECUTE privileges on CTX_DDL to your Oracle user of Collaborator Server. This component allows to use Oracle Text component instead of regular expression query for [full-text search](#) from Web Client. By default, Oracle databases use search based on regular expressions. If the default settings do not suite your requirements, you can change them on the Oracle side or through Collaborator admin UI. Once done, restart your Collaborator server to complete its upgrade.

When [installing](#) Collaborator on a server, the installation wizard will prompt for the Oracle server host name, TCP/IP port (default is 1521), database service name (not the SID!), user name, password and path to JDBC driver. The installer will *not* report any connectivity errors.

Warning: The database service name is not the same thing as the SID! This change was made by Oracle in version 9iR2.

The database service name is fully-qualified, corresponding to GLOBAL_DBNAME in an .ora file. An example would be mysid.mydomain.com. The database service name is also sometimes referred to as "TNS alias" or "connect descriptor".

The SID is the shorter name, corresponding to SID_NAME in an .ora file.

When you first visit the web page for Collaborator, it will detect that you have a new database and will create all tables, indexes, and views for you automatically, or give you an appropriate error message if there is a connectivity problem. Connectivity problems should be resolved by re-running the installer.

Oracle Limitations

- **Oracle 11g server with non-english locale:** An error may occur when initializing Collaborator database on Oracle 11g servers with non-english locale. To workaround the problem:
 1. Append the following [Java VM options](#)^[1092] to the <collab server install dir>/ccollab-server.vmoptions file:

```
-Duser.country=US  
-Duser.language=en
```
 2. Restart Collaborator server to apply the changes.
 3. Open Collaborator Web Client and proceed with database initialization.
- Double quote characters (") in custom field names may break Oracle reporting views. Custom field names become column headers in the views, and Oracle does not allow double quotes in column names. Because of this, Collaborator removes double quote characters from the names of custom fields when it creates reporting views for Oracle databases. If some custom field names differ only by double quotes this would result in an "ORA-00957: duplicate column name" error in server logs. To resolve the issue, you may either remove one of duplicate column names from the reporting view, or rename the custom fields to avoid coincidence.
- Loading large dump files to Oracle may take up to a full day to complete. This appears to be an issue with Oracle driver and is under investigation.
- On Oracle databases, Collaborator does not search the contents of custom fields by default (since this significantly reduces search performance). Instead, the search results page display additional fields that define in what areas to perform new search. In this panel you can enable searching in custom fields.

Troubleshooting

We use the Oracle JDBC driver to connect to your Oracle database. The driver has a few undocumented behaviors that may come as a surprise. There are threads on Oracle's tech support forums about this.

Most of the problems arise in the `GLOBAL_DBNAME` field in your `SID_DESC` entry from your `listener.ora` file. A typical entry might look like this:

```
(SID_DESC =  
(GLOBAL_DBNAME = mysid.mydomain.com)  
(ORACLE_HOME = /app1/oracle1/product/10.2.0.1)  
(SID_NAME = mysid)  
)
```

Most other Oracle-based programs use the `SID_NAME` field to identify the database, but the JDBC driver uses `GLOBAL_DBNAME`. This would cause a connection error in the example above.

Also note that the database service name is not the same thing as the `SID`. This change was made by Oracle in version 9iR2. The installer asks for the database service name, not the `SID`. The database service name is also sometimes referred to as "TNS alias" or "connect descriptor".

Typically, this means you should use the `GLOBAL_DBNAME` in the installer (that is, `mysid.mydomain.com`) and not just the `SID` (that is, `mysid`).

3.1.3 Server Installation

Collaborator uses a stand-alone web server for a cross-platform, no-client, firewall-friendly user interface. Please review the [System Requirements](#)^[87] section before continuing.

First, you need to download the correct installer for your platform from our website:

<http://support.smartbear.com/downloads/collaborator/>

To learn how to upgrade an existing Collaborator server, please see [Server Upgrades](#)^[81].

In this section:

[The Graphical Installer](#)^[89]

[Normal Installation](#)^[89]

[Advanced Installation](#)^[73]

[Upgrade Installation](#)^[88]

[The Non-Graphical Installer](#)

[Install Tips](#)

[Installing more than one server instance on a single machine](#)

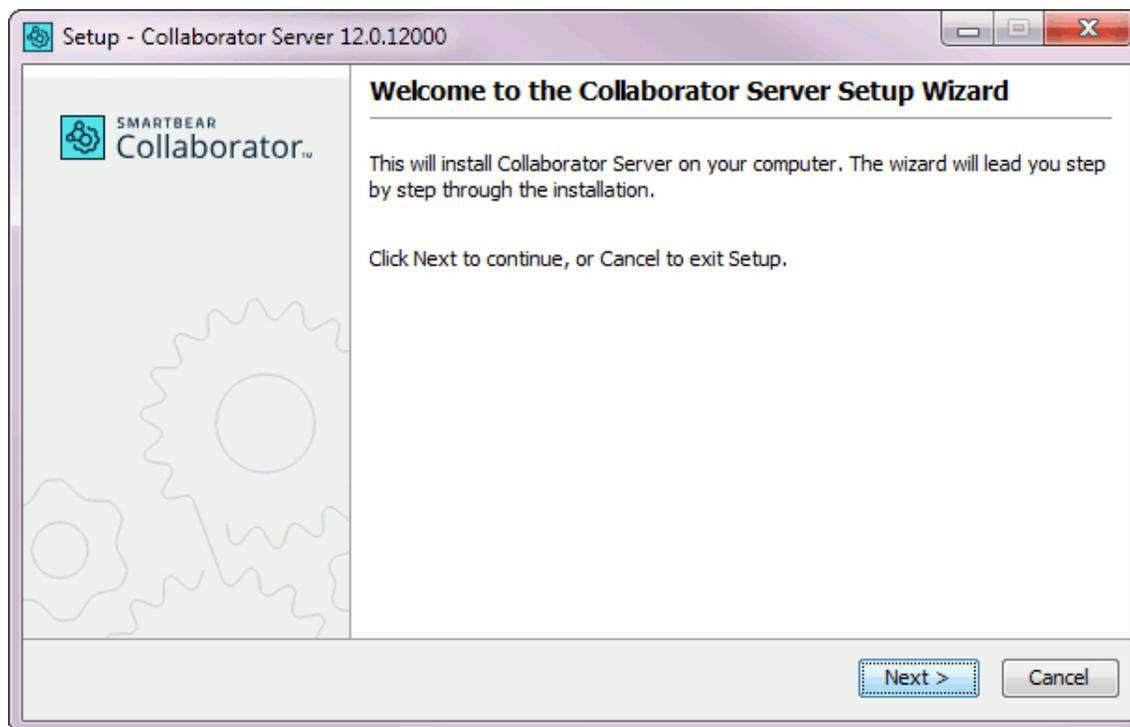
[Installing on a system with multiple JRE installations](#)

The Graphical Installer

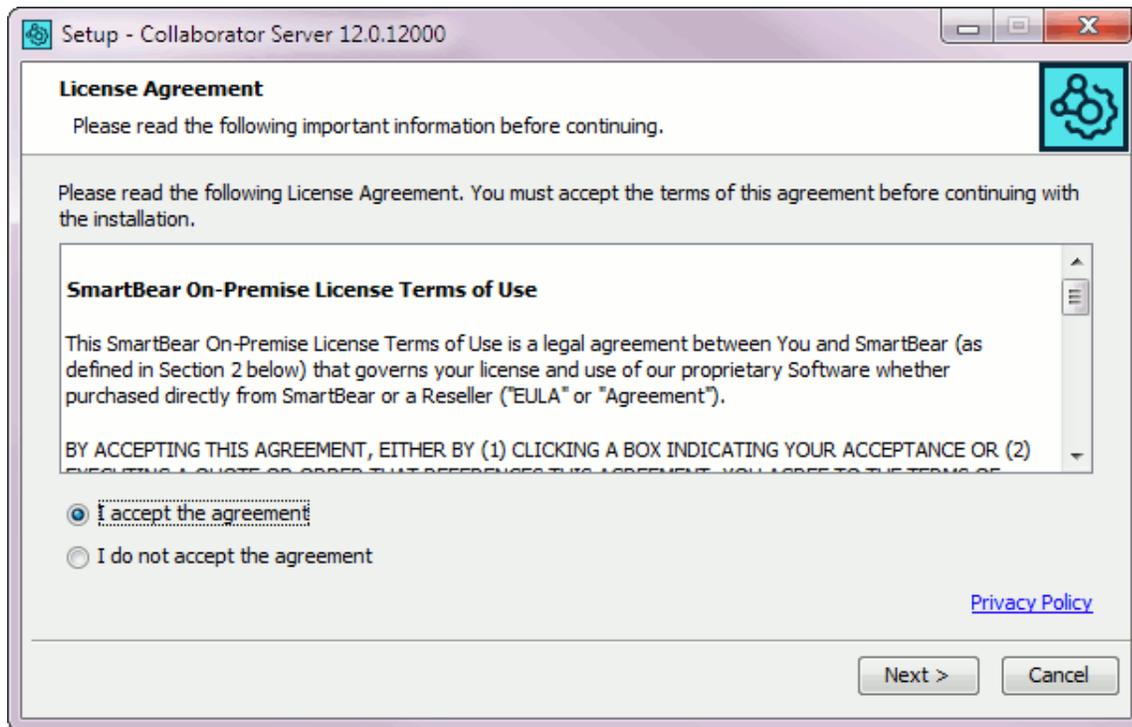
Installers can be run in a graphical, interactive mode or an automatic mode. For first installation, you will need to run the graphical version so you can select options.

Normal Installation

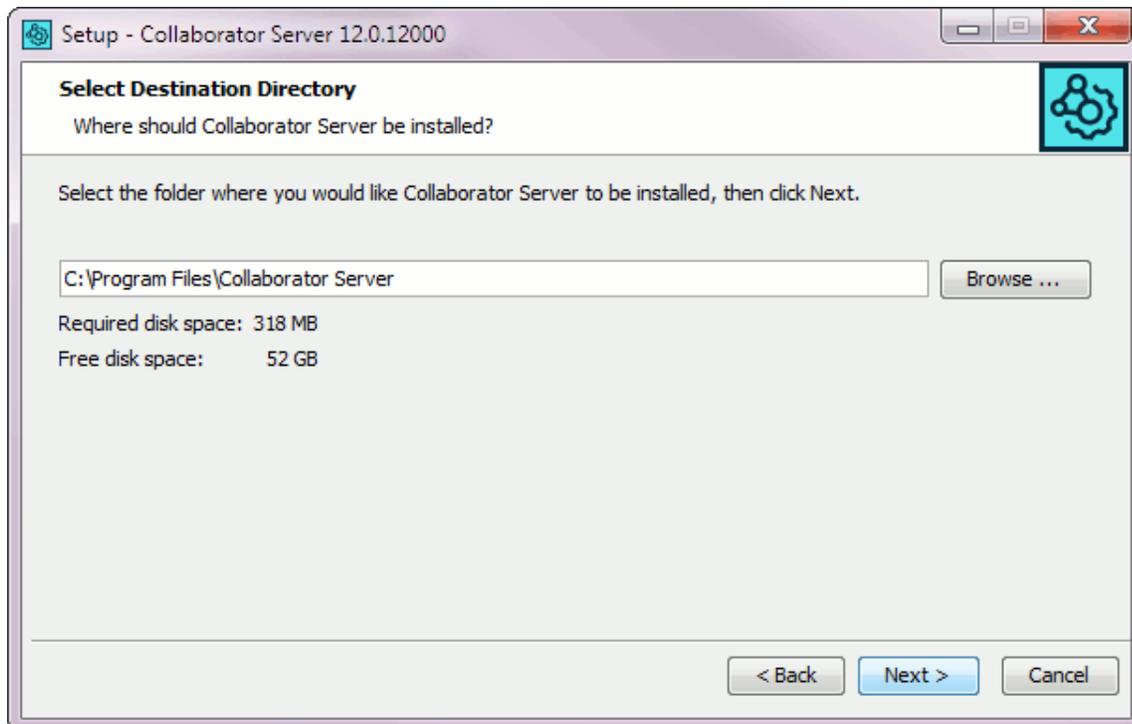
The first screen of the wizard lets you know it is working:



The second screen is the End User License Agreement (EULA):



In the third screen, you can select disk location for the installation files.



This directory should be writable by the server because several dynamic files are created here including web server logs, temporary storage, and long-term storage for file content uploaded by users. All of these locations can be changed if it is critical that the installation location be read-only, but this requires significant work on the part of the administrator and makes upgrades more difficult.

Make sure at least 5 gigabytes of space is available in the named directory. Your users will need the space for file uploads. You can always move the file upload directory.

In the forth screen, the installer prompts to create the first user of your Collaborator server.

Setup - Collaborator Server 12.0.12000

Create Collaborator User

Please note that all form fields are required.

Please create your account for logging into the Collaborator server.

Company: ACME Software

Full Name: John Smith

Email: John.Smith@acme.com

Phone: +1987456

Username: jsmith

Password: ●●●●●●

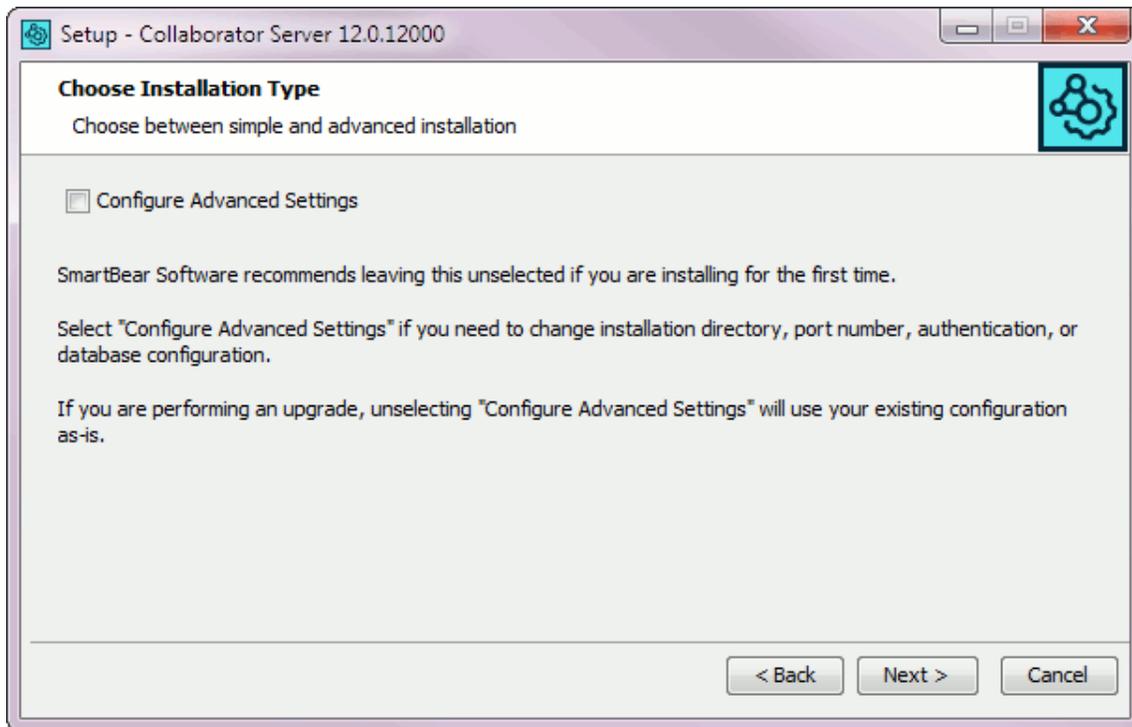
Confirm Password: ●●●●●●

Next > Cancel

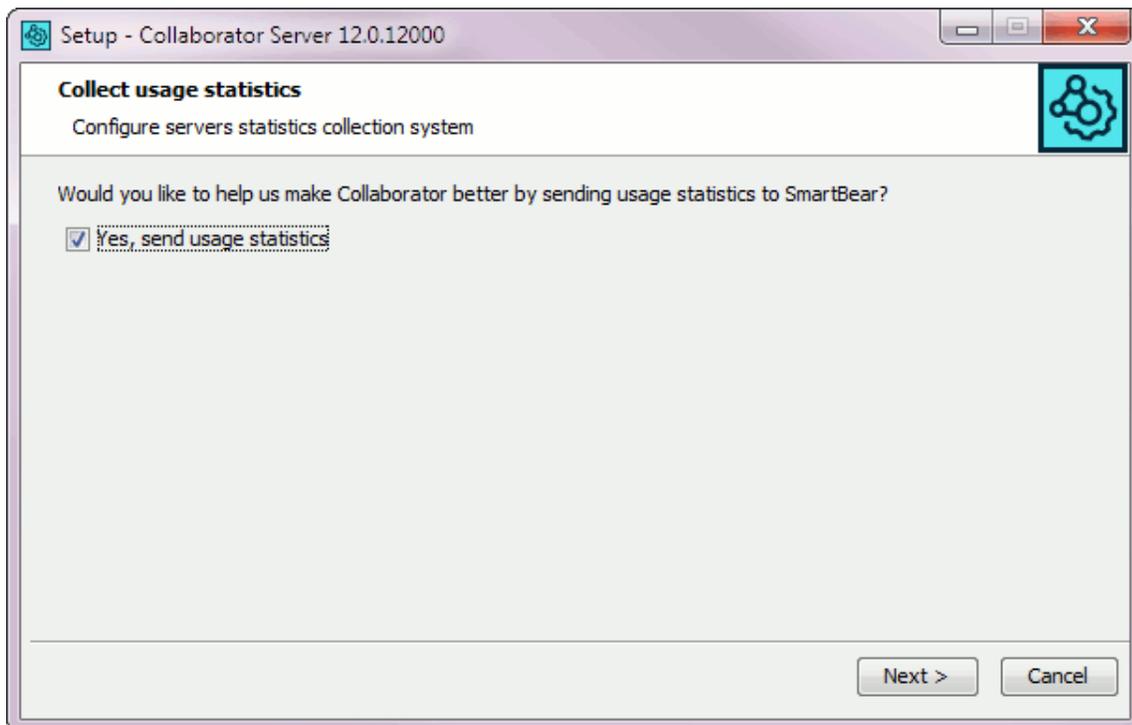
Important: The first user will have Administrator privileges on this Collaborator server.

Fill in company name, full name, email address, phone number, username and password. The contact information is primarily there for your users to know who to contact if they are having issues with Collaborator. 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.

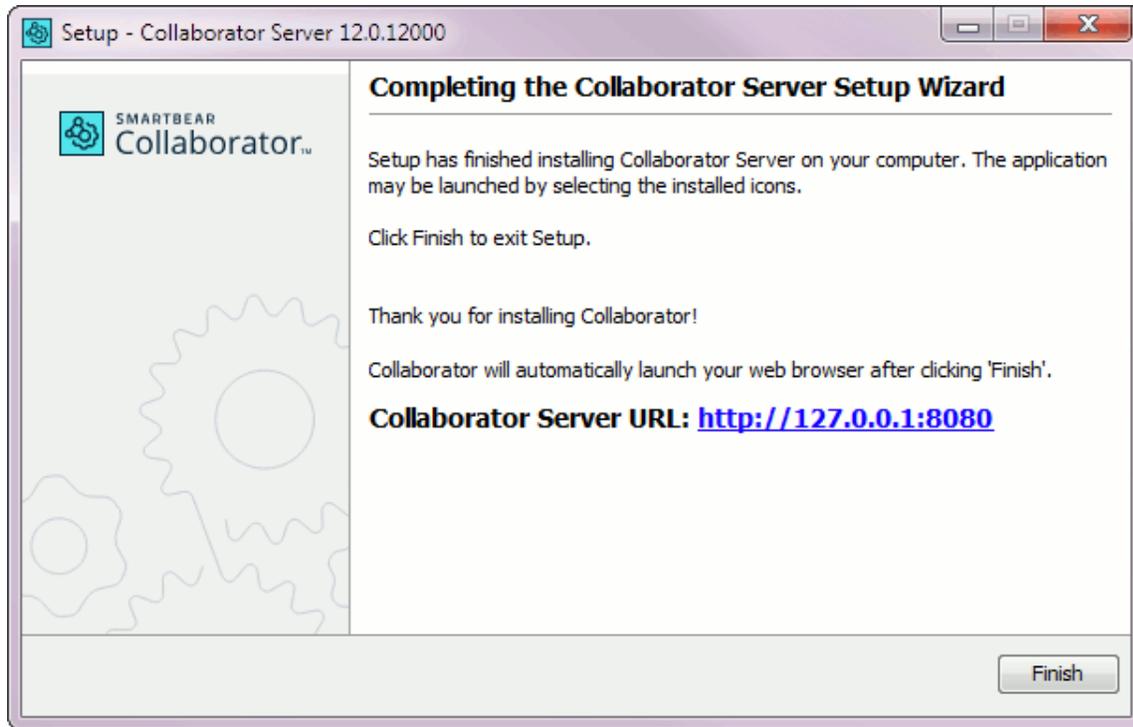
The next screen allows you to select whether to [configure advanced options](#). By default, this checkbox is unselected and the default options are recommended for first-time and evaluation installations.



The next screen asks your permission to collect and send server usage statistics to SmartBear. To learn about our privacy policy, visit <https://smartbear.com/privacy/>.



After this, the installer copies the server files, stopping any existing server if necessary. Once the new files are installed, the server is started automatically, and the installer tells you it is finished:



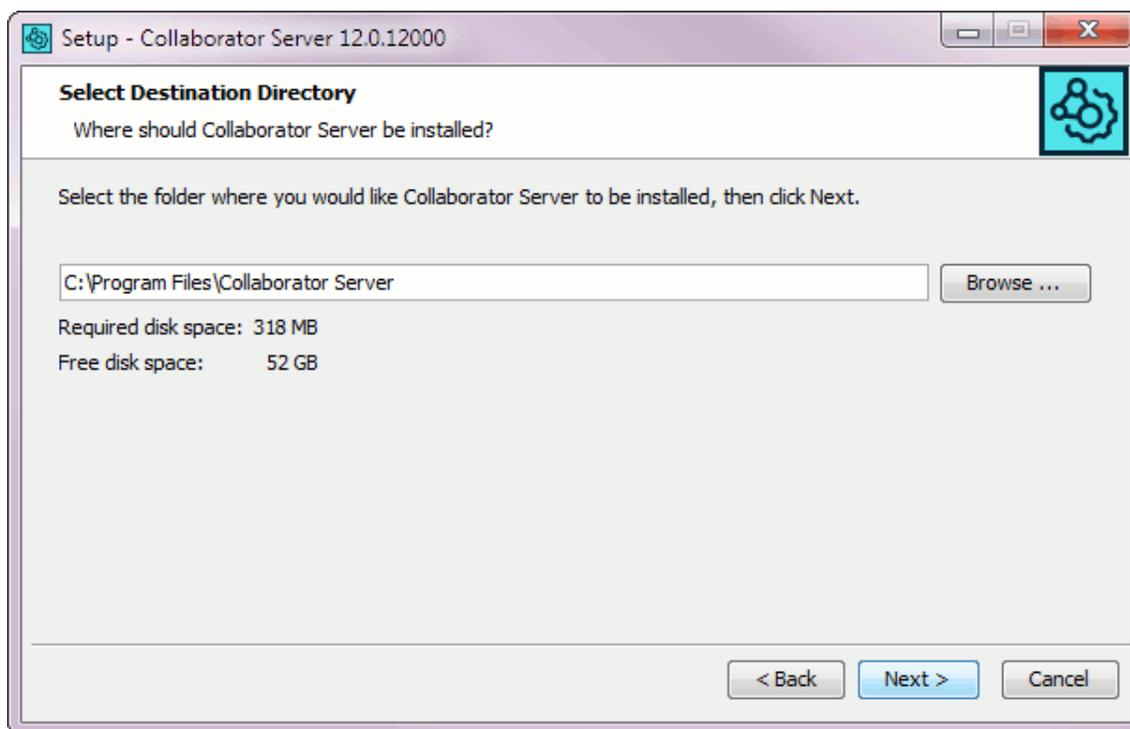
After you click Finish, a web browser will open, pointed at your installed server.

Warning: If the server has not quite had enough time to fully start up, it might take a while for the web page to load and it might even fail to open. Just "refresh" the browser.

Advanced Installation

Selecting the 'Configure Advanced Settings' checkbox, allows you to override the default settings and specify your own configuration.

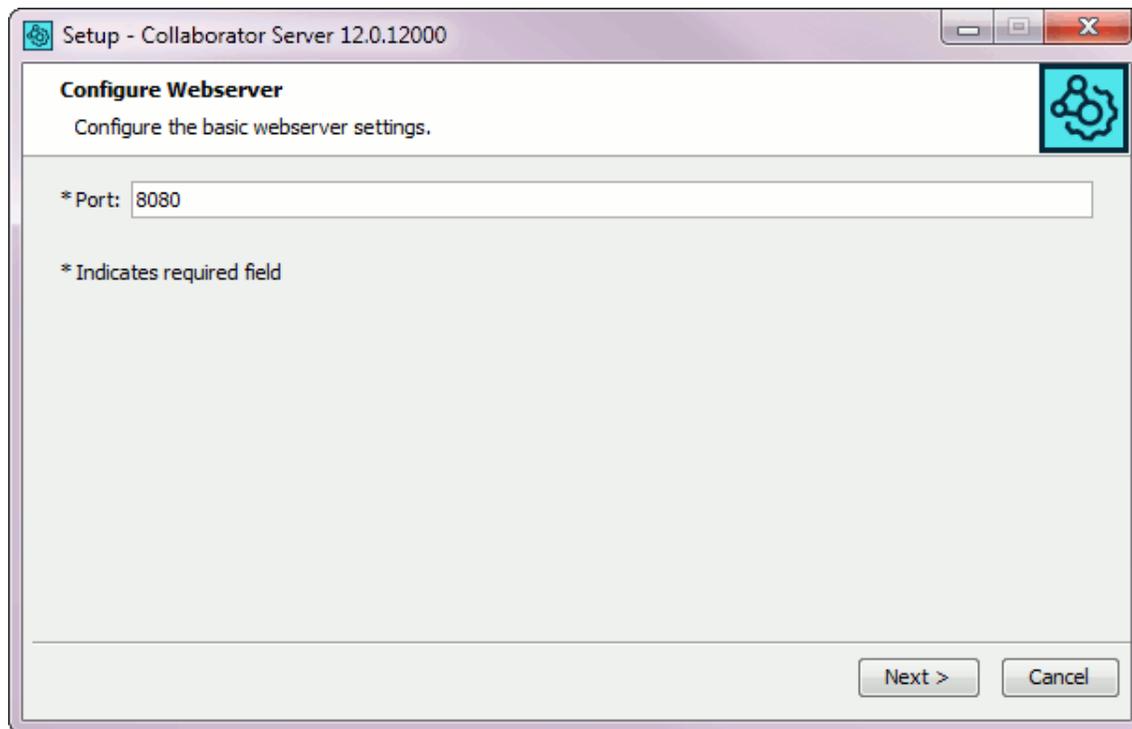
On the first step of advanced configuration, you can re-select disk location for the installation files.



This directory should be writable by the server because several dynamic files are created here including web server logs, temporary storage, and long-term storage for file content uploaded by users. All of these locations can be changed if it is critical that the installation location be read-only, but this requires significant work on the part of the administrator and makes upgrades more difficult.

Make sure at least 5 gigabytes of space is available in the named directory. Your users will need the space for file uploads. You can always move the file upload directory.

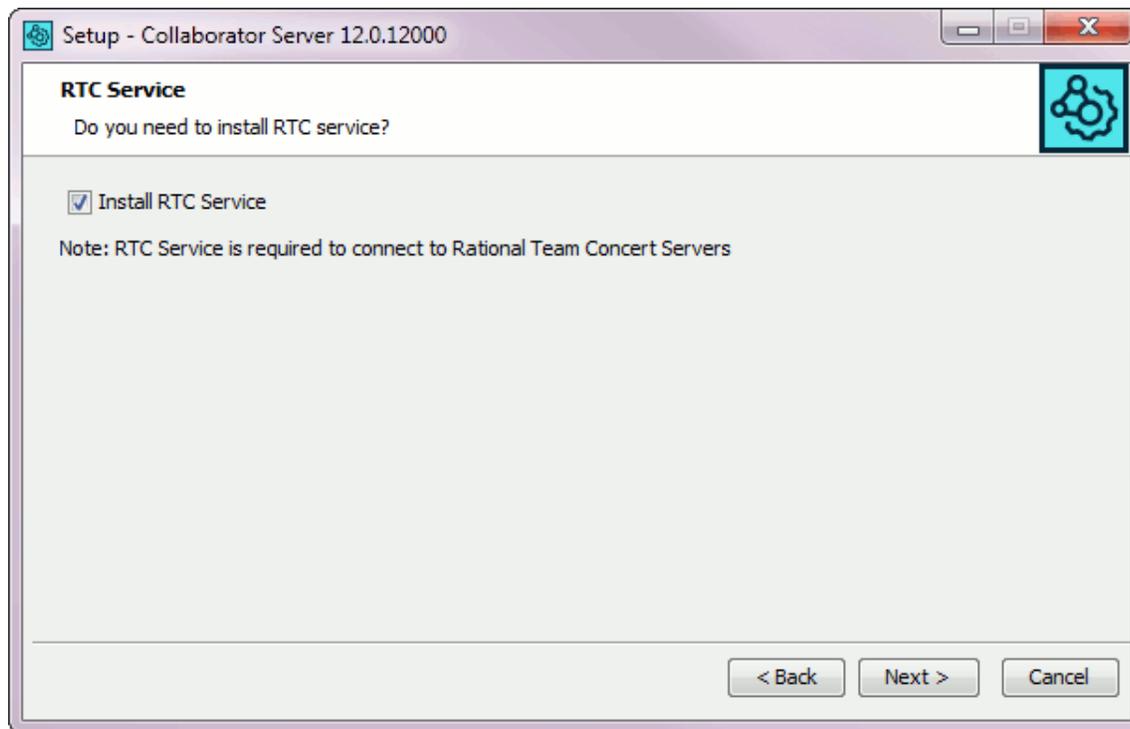
On the next screen, you can specify port number for your server:



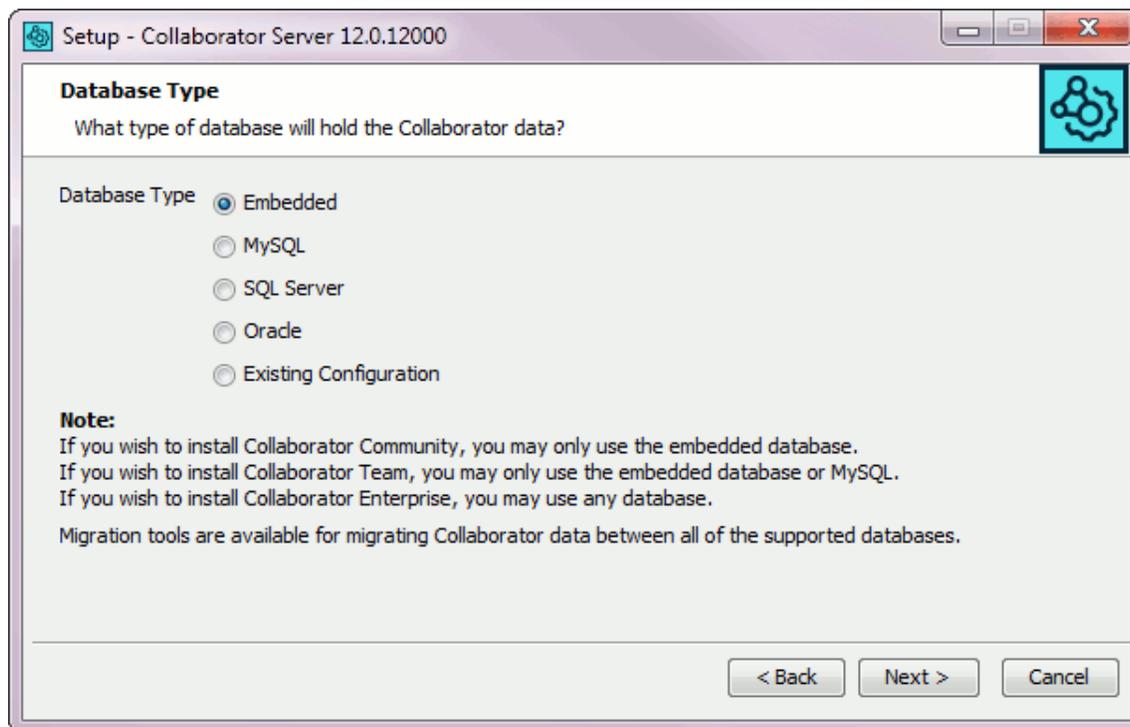
The port number should be selected as to not conflict with any existing services. The installer will attempt to connect to this port when you click Next; if the port is already taken by another process, you will get a warning message. You can elect to try a different port or continue. Continue at your own risk -- probably the server will not be able to start up and you will have to make the port available and restart the server manually.

Additionally, your firewall settings may prevent remote access on the default port or on your selected port. In order to allow access, you will have to modify your firewall settings accordingly. For more information see the [troubleshooting section](#)^[502].

On the next screen, you can select whether to install helper RTC Service to your server. This service is required if you plan to use [RTC integration](#)^[618].

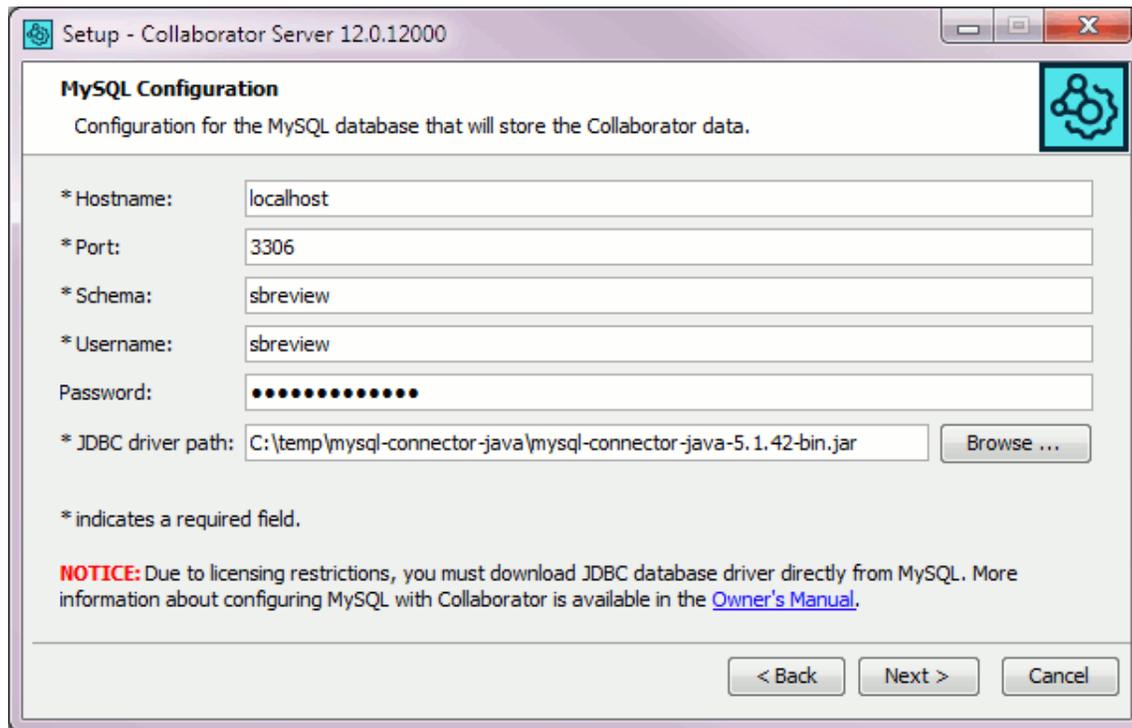


Next, you configure the database connection. The database should already be installed and ready



For trial installations, you will probably want to select the default "Embedded" database. You should migrate to a full-featured database before you use the server in production.

If you picked anything but the "Embedded" database, the next screen lets you configure the connection to the database server:



Setup - Collaborator Server 12.0.12000

MySQL Configuration

Configuration for the MySQL database that will store the Collaborator data.

* Hostname: localhost

* Port: 3306

* Schema: sbreview

* Username: sbreview

Password: ●●●●●●●●●●

* JDBC driver path: C:\temp\mysql-connector-java\mysql-connector-java-5.1.42-bin.jar

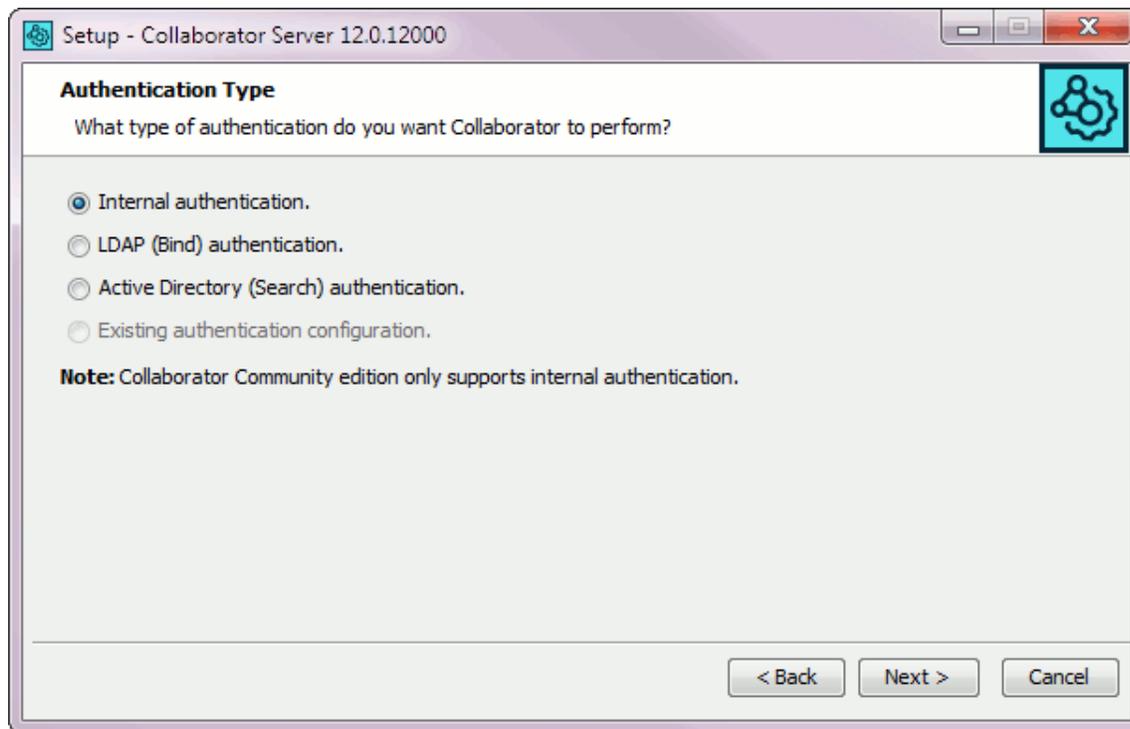
* indicates a required field.

NOTICE: Due to licensing restrictions, you must download JDBC database driver directly from MySQL. More information about configuring MySQL with Collaborator is available in the [Owner's Manual](#).

< Back Next > Cancel

The exact format of this screen depends on the database you chose. The Username and Password fields here refer to the *database* username and password. Typically, you will want to create a special database username and password for the Collaborator application so you can control exactly which data it has access to. This usually means full access to the database created for Collaborator and no access to any other database.

The next screen lets you decide how users will be authenticated in Collaborator.

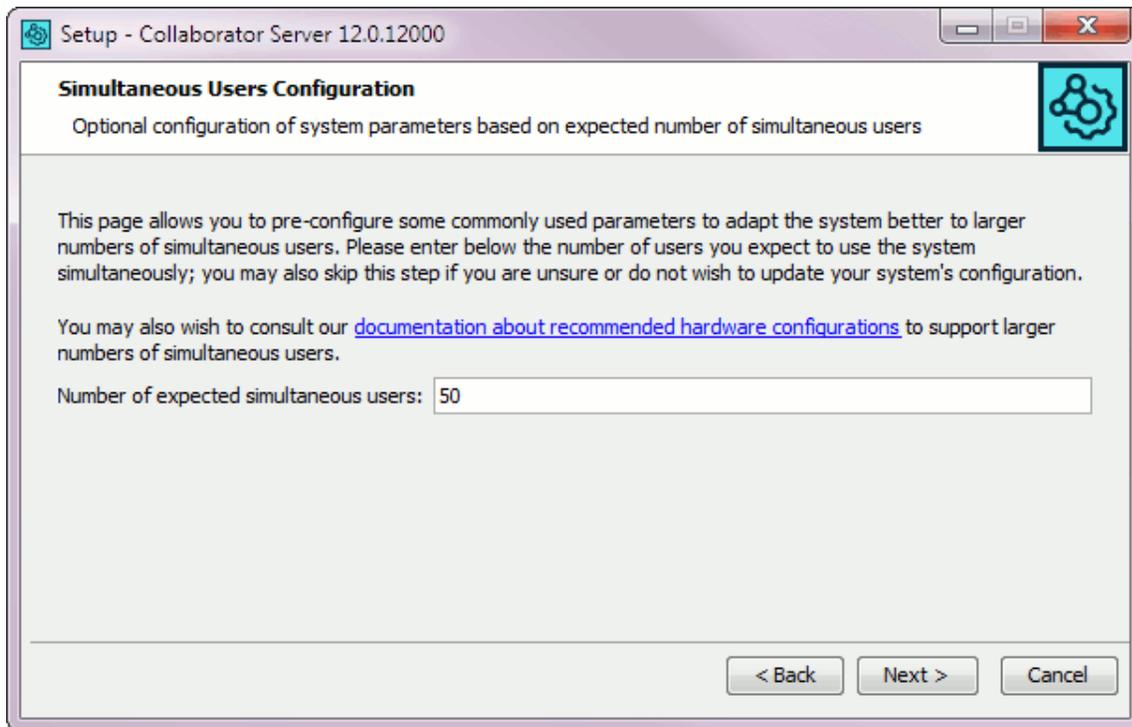


The simplest setting is "Internal," which means Collaborator should maintain usernames/ passwords in its own database.

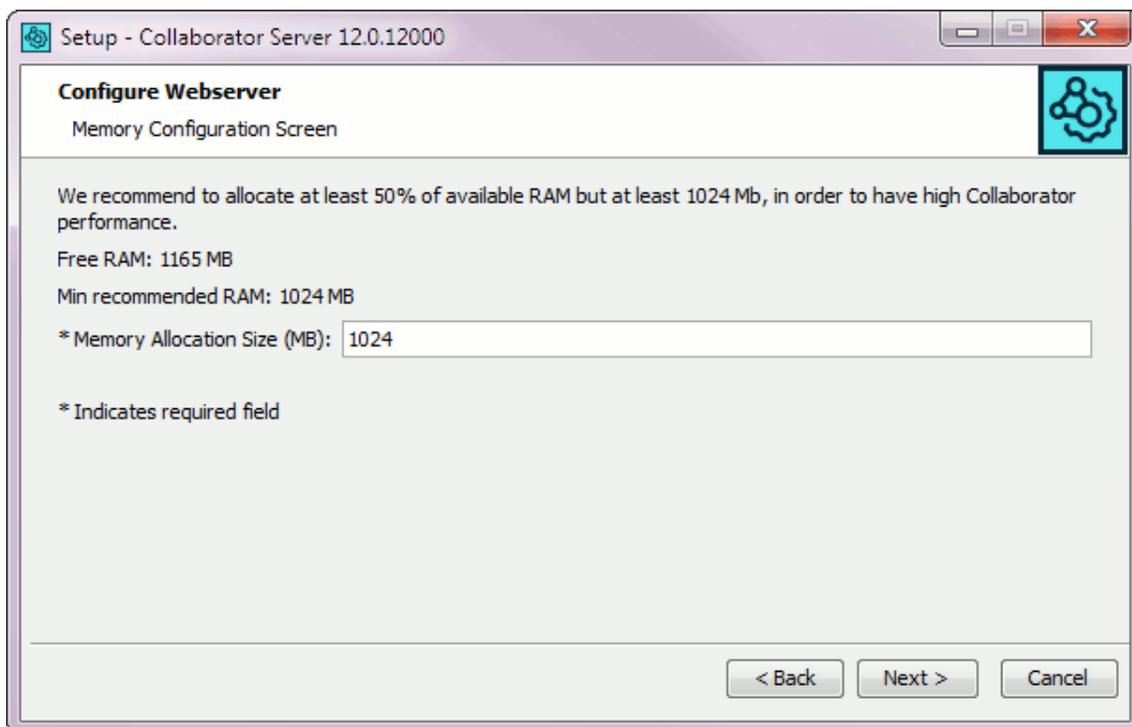
If your company uses LDAP or ActiveDirectory, you can use that method to authenticate users in Collaborator, which means you do not have to maintain the Collaborator user list at all. If you select the LDAP method you will get an additional wizard screen that lets you supply the settings for your LDAP server. See the [LDAP section](#) for details.

You will also have the option to choose "Existing LDAP authentication configuration" if you are [upgrading](#) an existing installation.

The next screen allows you to specify the approximate number simultaneous users and automatically configure your server to support this number of users.

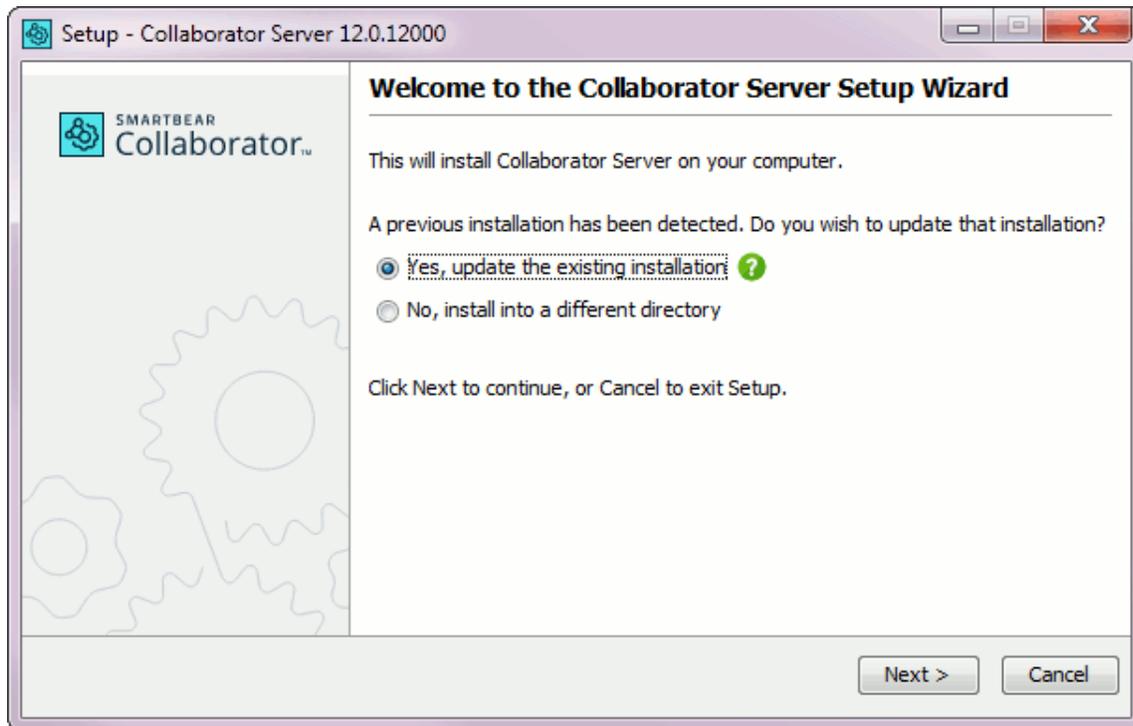


The next screen allows you to specify lower memory bound for Collaborator server memory allocation.



Upgrade Installation

If the installer detects an existing Collaborator server, either to upgrade the existing server or to install into another directory.



When upgrading, the installer retains the current configuration of a server, that is, it assigns the same installation folder and all setting values as in the current configuration - though they can be edited, if desired.

The Non-Graphical Installer

If you are upgrading the server instead of installing from scratch, you have the option of installing without any graphical user interface.

We recommend that you always use the graphical interface when possible because it gives you the chance to review settings, especially new settings that we might have added since your last installation.

To run the installer without a GUI, run the installer from a command-line using the `-q` switch. To set the installation directory from the command-line, use the `-dir [directory]` switch. The `-q` switch gives you a silent install and will not prompt you for any installation instructions. If you would like to be prompted for installation instructions without using the graphical installer, you can run the installer from the console using the `-c` command.

Install Tips

Installing more than one server instance on a single machine

All server instances need to be running on unique and available ports. Each server instance will also need a separate database and license code.

On Windows, install the different instances in different directories, on different ports, with separate database instances. This will get all of the software installed, but only the last one will be properly installed as a service. To install the others as a service, run the following command from the command line:

```
<install-dir>\ccollab-server /install service-name
```

This will install that instance as a Windows service with the specified service name. To uninstall a service that was misnamed or no longer used:

```
<install-dir>\ccollab-server /uninstall service-name
```

On *nix platforms, you should install the server in multiple directories and then edit your `/etc/init.d` scripts accordingly.

Installing on a system with multiple JRE installations

On systems with multiple JREs installed, it may be necessary to specify to the installer which JRE should be used for Collaborator. On Windows platforms, running the installer with the `-manual` argument will suppress the JRE search and cause the installer to prompt for the JRE location (specifically, `java.exe`). On *nix platforms, you can specify the JRE location by setting the `INSTALL4J_JAVA_HOME_OVERRIDE` environment variable to the `JAVA_HOME` value.

3.1.4 Server Upgrades

This topic explains how to upgrade from a previous version of Collaborator server and retain all your data and settings.

For major releases, we recommend that you install the new version on a test machine using a copy of your current database. Test a typical workflow on the system to make sure it works and that there are no surprises for your users. See [Testing Newer Versions](#) for details.

Back Up Before Upgrading

During the upgrade process, changes may be made to Collaborator's database schema. Thus the upgraded server's database may become incompatible with previous versions of Collaborator. Therefore, it is important to [perform a complete backup](#) before attempting an upgrade.

Creating a backup is especially important if you are upgrading from an outdated version of Collaborator, CodeCollaborator or PeerReview Complete. Collaborator merges and replaces both CodeCollaborator and PeerReview Complete.

How to Upgrade

Upgrading the server component works exactly like [installing](#)^[68] it. To keep your data and configuration, **do not uninstall previous version** of Collaborator server. Just install a new version over the existing version.

[Download](#) the server installer(s) and proceed through the installation wizard. If the installer detects an existing Collaborator server, it automatically assigns the same setting values as in the current configuration - though they can be edited, if desired.

During server upgrade, the installation wizard verifies Java Database Connectivity (JDBC) drivers your server uses to connect to MySQL, SQL Server or Oracle databases. If these are legacy JDBC drivers, the wizard removes them. In this case you may need to download and install new drivers as described in [Database Installation](#)^[69] sections.

Once the installation is finished, an update of database schema could be required. In this case, on attempt to open a Collaborator Web Client, it will display the database update form:

Database Upgrade Required

Collaborator requires a database upgrade to continue. Before proceeding you should back up your current database.

If you are an administrator and are ready to proceed, click the button below to set up the database. This process can take a little time; please be patient.

[Upgrade Database](#)

Ensure that you have made a backup and press Upgrade Database button to proceed with the database migration. The rest of schema upgrade process is automatic. This may take some time depending on the scale of the changes required, so please be patient.

Compatibility with Older Clients

Collaborator server is backward compatible with a certain number of earlier versions of Collaborator clients. Generally, a server supports clients of the current and previous major release. You can find the number of the oldest stable client application, as well as specify your own minimum allowable build number in the [Administrator Settings](#)^[185]. Client applications whose build number is lower than [Minimum Client Build](#)^[185] are incompatible with the current version of Collaborator server.

In order to use new features of Collaborator, we recommend that you upgrade Collaborator clients, as well.

Upgrade Notes

- **Windows-Only:** The system will be taken off-line while the upgrade takes place and will start automatically after the upgrade completes. When upgrading using a 64 bit installer on a server installed using the 32 bit installer, be sure to verify the install directory is the same as you currently have. The 64 bit installer will NOT automatically detect the existing install directory of a Collaborator install that was done using the 32 bit installer. In this scenario, simply edit the install location to be the fully qualified path of the existing install directory.
- **Unix-Only:** The installer will *not* automatically stop or start the server, so if the server is currently running you will need to manually stop it, perform the upgrade, and then restart it.
- After the upgrade validate the configuration of your Java Database Connectivity (JDBC) drivers . Upgrading an outdated server may remove legacy JDBC drivers.

3.1.4.1 Testing Newer Versions

If you are currently using Collaborator and want to try a newer version without risking your existing installation, there are a couple ways to install a newer version in an existing Collaborator environment while still maintaining the integrity of your existing version.

Fresh Installation

This option allows a quick and easy way to try Collaborator from scratch. However, you will not have access to all your existing review and user data.

To test a new Collaborator server with a blank database, download and [install](#) the newer version of the Collaborator server software. If you are installing onto the same machine as your existing Collaborator server software, *be sure to specify a different directory, port number, and database instance*. Installing it in the same directory will upgrade your current installation, and you will not be able to "undo".

Parallel Operation

This option allows you to continue running the old version of Collaborator in parallel with the newer version you are testing.

1. Do a [complete backup](#) of your existing Collaborator server
2. After the backup finishes, install the exact same build of the Collaborator server software that you are currently using. For example, if you are currently running version 8.0.8001, then install version 8.5.8500 (older versions of the installer are available [here](#)).

After the installer finishes it will display a web page in your default browser. That web page will have a button for creating the Collaborator database tables - do not push that button! You do not want those tables to be created because you are about to restore from your existing database.

Again, if you are installing onto the same machine as your existing Collaborator server software, *be sure to specify a different directory, port number, and database instance*. Installing it in the same directory will upgrade your current installation, and you will not be able to "undo".

3. Restore the backup that you just created to the new installation of Collaborator.
4. Then run the installer for the newer version and when prompted, select the directory that contains the Collaborator server that you just installed. This will cause the installer to upgrade that installation.

Windows Notes

If you choose either of the above options, you will end up with two instances of the Collaborator server running: one for your older version and one that is running the newer version. If you are running both instances on the same machine and if the operating system on that machine is Windows, then there is one additional step.

The Collaborator server installer for Windows always uses the same Windows service name: `ccollab-server`. This means that after you install a second instance of the Collaborator server on a Windows system, the Windows service named `ccollab-server` points to the new installation. The original installation no longer has a Windows service entry and is therefore no longer running.

This problem is easy to fix. In a command window set the working directory to the original installation of the Collaborator server software. Then enter this command:

```
ccollab-server /install <service-name>
```

You can specify anything you want for `<service-name>` except for `ccollab-server`. This will create a new Windows service with its own name for your existing Collaborator server installation.

3.1.5 Platform-Specific Notes

This is additional server-related information that is specific to certain operating systems.

Windows

The web server is installed as a Windows Service. This means the server starts up automatically when the machine boots up, and no user needs to be logged in. The service can be started and stopped manually and even remotely.

The default installation is for the service to start automatically upon system startup using the default service user. All of these settings can be changed by the administrator after installation using Microsoft's standard service configuration control panel.

Warning: If you change the user under which the service runs, make sure the installation directory is still both readable and writable by the new user.

Warning: If Collaborator is located on the same machine as the database, and if the Collaborator service starts up before the database service, Collaborator might fail to start up. The work-around is to restart the Collaborator service, but the fix is to use service dependencies to tell Windows that the Collaborator service is dependant on the database service. This is a standard Windows service feature.

Linux / Solaris / BSD

The web service is not automatically installed such that it will run automatically when the system starts up. However this is easy to set up.

The installation directory contains a file `ccollab-server` that can accept the usual start and stop commands. Create a symbolic link to this file from your standard installation directory (for example, `/etc/rc3.d` or `/etc/rc.local`) to cause the server to start automatically upon system startup.

Warning: If Collaborator is located on the same machine as the database, make sure it starts up *later* in the start-up process than the database server. Otherwise, Collaborator will fail to start up.

3.2 Server Administration

This chapter covers different aspects of server management and administration.

In This Section

- [Network Configuration](#)^[86]
Describes how to configure server proxies and other network configuration.
- [Collaborator Licensing](#)^[87]
Explains how Collaborator is licensed and other license-related questions.
- [Content Storage](#)^[88]
Explains how to organize storage for the uploaded files.

- [Server Backup / Restore / Migrate](#)^[96]
Describes how to backup a Collaborator server, restore it from the backup and how to migrate data between databases.
- [Security Considerations](#)^[99]
Covers various options which affect the overall security of the system.
- [LDAP and Active Directory Authentication](#)^[106]
Describes how to establish LDAP or Active Directory authentication.
- [Configuring HTTPS](#)^[117]
Describes how to configure HTTPS connections.
- [Single Sign-On](#)^[124]
Describes how to establish single sign-on authentication.
- [JMX Monitoring](#)^[143]
Describes how to use Java's standard, built-in network monitoring system.
- [Technical Server Specifications](#)^[144]
Describes the technical aspects of the Collaborator server.
- [High Availability Best Practices](#)^[147]
Describes how to establish a test server.
- [Variable Substitution](#)^[149]
Describes the built-in system of variable substitution.
- [Archiving Reviews](#)^[153]
Describes how to pack completed reviews to a ZIP archive.
- [Branding Your Server](#)^[156]
Describes how to customize the web interface with your company logo.
- [Logging](#)^[158]
Describes the logging system of the Collaborator server.
- [Troubleshooting](#)^[162]
Describes administrator actions in case of troubles.

3.2.1 Network Configuration

Certain network topologies and configurations require specific configuration in the server component.

Server Proxies

Collaborator optionally will connect to a licensing server hosted by SmartBear via standard HTTP protocol in order to validate your license code. If you are installing Collaborator in an environment where outbound HTTP requests are required to use a proxy, you will need to configure Collaborator to use the proxy.

Proxy settings are configured in the *installation-directory/collab-server.vmoptions* file. To enable an HTTP proxy, you will need to add the following lines to that file:

```
-Dhttp.proxyHost=proxy_hostname  
-Dhttp.proxyPort=proxy_port  
-Dhttp.proxySet=true
```

Many proxies are configured to reject connections to internal URL's via the proxy, as these connections are supposed to be made directly. For this reason, it is also a good idea to configure internal hosts as non-proxied hosts. Specifically, it is important to configure `localhost` (including its resolvable name), the bug tracking system, and the version control server as non-proxied hosts. These URL's are configured in Collaborator for integration purposes and a connection is made to validate the URL's entered in the configuration screens. If the proxy rejects the connections, you may not be able to properly edit those fields. To configure non-proxied hosts, add the following line to the `collab-server.vmoptions` file:

```
-Dhttp.nonProxyHosts="localhost|collabserver|*.mydomain.com"
```

The format for the value is a list of hostnames delimited by "|" and using "*" for a wildcard.

Some newer firewalls have been known to cause additional problems with HTTP proxying. For instance, some firewalls periodically redirect HTTP requests to a firewall-generated web page requiring the user to log in. These firewalls are specifically designed to limit web access to users; preventing services (such as Collaborator) from accessing web services. Organizations with such firewalls will need to work with their network administrators to exempt Collaborator from this policy or otherwise allow access.

3.2.2 Licensing

SmartBear offers both fixed-seat and floating-seat licenses for Collaborator.

Licensing Types

Fixed-seat licenses specify the maximum number of users, who can work with Collaborator. A user is a human being (not a machine) who was active in the past 30 days. If a user did not work with Collaborator during this period, Collaborator does not count this user as a license consumer. The fixed-seat licenses are most appropriate when most of users in your organization work with the product on a daily basis.

Floating-seat licenses specify the maximum allowed number of active **concurrent** users. A user is considered active if they are currently consuming a license. Floating-seat licenses are most appropriate when you have many users that will work with Collaborator occasionally.

In both cases, a user is a human being, not a machine or client software. If someone uses the Eclipse or Visual Studio client, stand-alone client and command-line client, all the usages are counted as one user (one seat).

Notes:

- Only the Collaborator server is licensed. The Collaborator client software does not need licensing.
- Collaborator does not support both fixed-seat and floating-seat licenses on the same server.
- For information on when Collaborator increases the license counter, see [below](#)⁸⁸. When you [disable](#)²¹⁰ a user, Collaborator returns the license to the pool immediately. It logs off that user and does not allow them to log in.
- Each license key is linked to the node ID of your Collaborator server, and gets carried over during server migration. Therefore, a new license key is not needed when migrating the server.
- User authentication, sometimes referred to as a log in, is not necessarily tied to license consumption. As an example, the user can authenticate through the GUI client but not be consuming a license.

License Consumption

The below describes how **floating-seat** license are consumed.

Collaborator WebUI

- When a floating-seat user logs in to Collaborator via a web browser, a license is assigned to that individual.

- The license will remain assigned to the user for as long as there is a Collaborator tab open in the browser.
- The license will be returned to the pool once all Collaborator tabs are closed, and one hour has passed.
- The license will be returned to the pool immediately if the user clicks “Logout”.

Collaborator Command-Line Client and GUI Client

- The command-line client only consumes a license when using the `ccollab admin wget` command.
- The GUI client never consumes a license.
- The tray notifier never consumes a license.

Collaborator Eclipse Plug-in and Visual Studio Add-in

- A license is consumed when the Collaborator review summary or diff viewer is open.
- Once a user leaves the Collaborator review summary or diff viewer windows, the license will be returned to the pool after one hour – provided they do not return to one of those screens.
- When Eclipse or Visual Studio is closed, the license is returned to the pool after one hour.

Exceeding the License Limit

How does Collaborator behave when you reached the license limit? If a user attempts to connect to Collaborator, the server refuses the login and displays an error message explaining that there are no available licenses left in the pool and asks the user to contact their Collaborator administrator. Additionally, Collaborator sends a notification message to the administrator stating that a user login was denied because the license limit has been reached.

Note: A user login can include situations when a user returns back to Collaborator after some period of inactivity. In this case, Collaborator may not ask the user to enter their login credentials. However, the user will see an error message about reaching the license limit.

One way to decrease the license consumption is to [disable](#)^[210] unneeded user accounts. Another way is to ask users who are not working with Collaborator currently to log off. The administrator can also log out these users manually.

The [system administrator](#)^[211] is always allowed to log in, even if the license limit has been reached. This allows you to fix licensing issues either by disabling users or by activating a new license key.

Monitoring License Usage

There are several ways to keep track of licenses used:

- You can view the current license usage number on the [Users Administration](#)^[206] screen. You can also manually disable or log out users, if you need to reclaim the licenses quickly.
- You can also see the license usage number, the number of denied user logins, and optionally, the list of active floating-seat users on the [Licensing](#)^[87] screen.
- You can see historical activity patterns on the [System Status](#)^[207] screen.
- You can use [JMX](#)^[143] to monitor usage and licensing information.

How Many Licenses Do I Need?

It is hard to give guidance because it varies quite a bit.

Generally the best advice is just try using Collaborator. There is a report on the [User Administration](#)^[206] page that tells you exactly how many "fixed" and "floating" seats you are using at the moment. Use this number to estimate the number of seats you will need and determine the license type.

Typically, a trial does not involve everyone, and typically the usage pattern is not exactly the same as when it will be deployed, so you will have to estimate. Still, you will be doing so with some real numbers.

Here are some additional pointers:

- If you have developers in many time zones, floating-seat licenses are usually considered to be a better option.
- If each user works with Collaborator daily, a fixed-seat license is typically the best option.
- If you expect large spikes in usage — when perhaps everyone is online at once during a review crunch — you most likely will want fixed-seat licenses. Otherwise, you have to get enough floating seats to handle that peak usage.

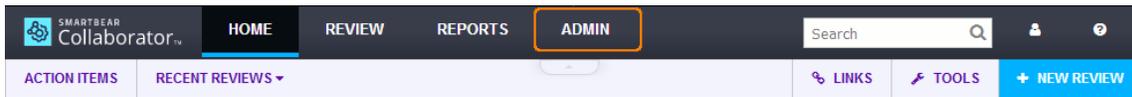
Activating Your License

1. Getting Node ID

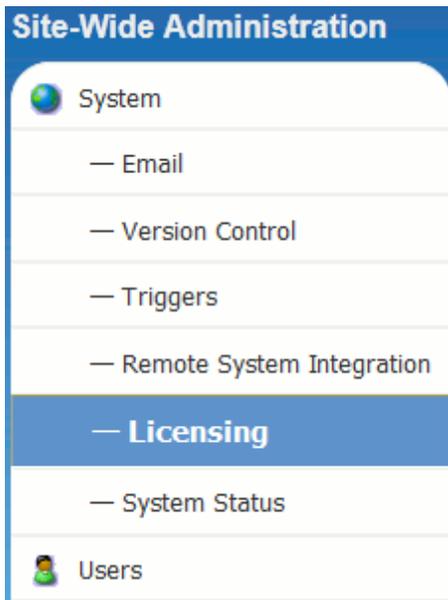
To get the license code, send the Node ID attribute of your Collaborator server to your sales account manager at SmartBear:

1. Log in to Collaborator as a user with administrator permissions.

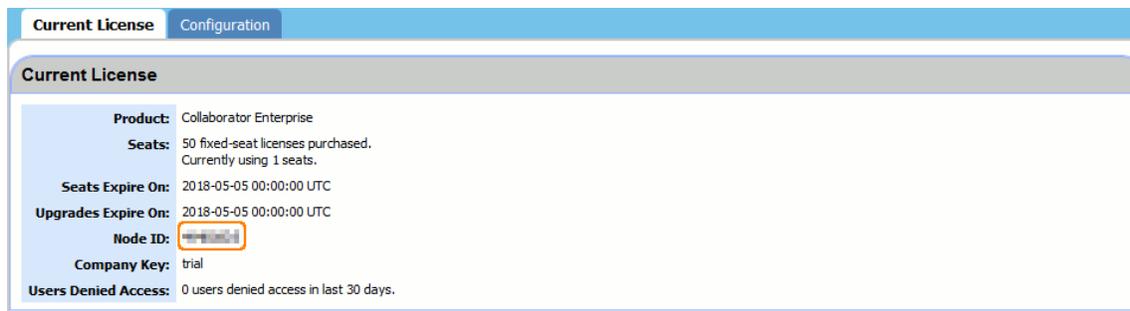
2. Select **Admin** from the top menu:



3. Select **Licensing** from the list on the left:



4. In the **Current License** section on the right, find the Node ID value. Copy it and send to your sales account manager at SmartBear:

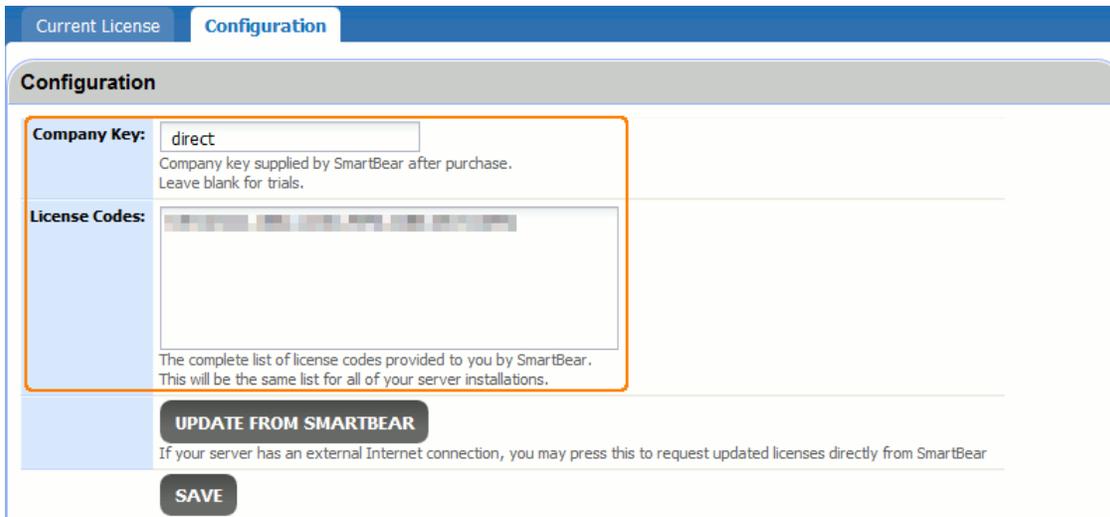


2. Entering Your License Code

After you receive the license code from SmartBear, you need to activate the license on the Collaborator server (client Collaborator software does not require licensing):

1. Log in to Collaborator as a user with administrator permissions.
2. Select **Admin** from the top menu.

3. Select **Licensing** from the menu on the left.
4. In the **Configuration** section, enter your company key in to the **Company Key** field and license code into the **License Codes** field:



The screenshot shows a web interface with a blue header bar containing 'Current License' and 'Configuration'. Below the header is a 'Configuration' section with a light blue background. It contains two input fields: 'Company Key' with the value 'direct' and 'License Codes' which is empty. Below the 'License Codes' field is a button labeled 'UPDATE FROM SMARTBEAR' and another button labeled 'SAVE'. The text below the 'UPDATE FROM SMARTBEAR' button reads: 'If your server has an external Internet connection, you may press this to request updated licenses directly from SmartBear.'

5. Click **SAVE** to apply the changes.

If license was activated successfully, Collaborator will display your licensing information (the number of fixed and floating seats). In case of an error, Collaborator will displays the error message at the top of the page.

Updating License Code

You can receive updated licenses from the SmartBear server after your initial license setup. To do this, simply click **UPDATE FROM SMARTBEAR** in the Configuration box (see the image below).

In order for this feature to work, your computer must have a functioning Internet connection, and proxies and firewalls in your network should allow connection to the Collaborator license server (URL <http://licensing.codecollaborator.com>, port 80).

The screenshot shows a web interface for configuration. At the top, there are two tabs: 'Current License' and 'Configuration'. The 'Configuration' tab is active. Below the tabs, there is a section titled 'Configuration'. It contains three main areas:

- Company Key:** A text input field containing the word 'direct'. Below it, a note reads: 'Company key supplied by SmartBear after purchase. Leave blank for trials.'
- License Codes:** A large, empty text area. Below it, a note reads: 'The complete list of license codes provided to you by SmartBear. This will be the same list for all of your server installations.'
- Buttons:** A button labeled 'UPDATE FROM SMARTBEAR' is highlighted with a red rectangular box. Below it, a smaller button labeled 'SAVE' is visible.

 A small note at the bottom of the configuration section reads: 'If your server has an external Internet connection, you may press this to request updated licenses directly from SmartBear'.

3.2.3 Content Storage

Most review data is stored in the database. The one exception to this is the contents of the files under review. These are stored in a folder described as the **content storage** or **content cache**.

Content Storage Location

The default location for the content storage is: <Collaborator Server>/tomcat/collaborator-content-cache

! The internal structure of the content storage is subject to change between versions of Collaborator, so we do not recommend altering the contents of the content storage directly without specific instructions from SmartBear technical support.

Change Content Storage Location

In some environments, the default content storage location could not be an acceptable solution. In this case you can change it.

Below are some things to consider when choosing a content storage location:

- File permissions may not allow writing in the installation folder.
- Maintenance of network storage may be easier if backups are already in place and disk usage is monitored automatically.
- Network storage allows for warm standby Collaborator servers to be available in the event of failure of the primary server.

To change content storage location:

1. Stop Collaborator server if it is running.
2. Open the <Collaborator Server>/tomcat/conf/Catalina/localhost/ROOT.xml file.
3. Find the `Parameter` element with the `content-cache` name attribute.
4. Specify the new path to the content storage in the `value` attribute of this element. Relative paths in this attribute are interpreted relative to the server installation folder.
5.  Copy the contents of the <Collaborator Server>/tomcat/collaborator-content-cache folder to the new content storage folder. Otherwise, review participants would encounter this error message when trying to open a file in a review: "Content for is not available – it was probably archived by your administrator."
6. Start Collaborator server.

Archive Content Storage

Over time, content storage will grow to be quite large, and will periodically need to be purged. The [Archive section](#)^[273] of the administrator interface allows you to check the current status of the content cache and to archive (or delete) files that have not been in use for a long time.

Share Content Storage

Sharing the content cache between servers is *not supported*. The only environment where Collaborator servers should be configured to use the same content cache is if one is configured as a warm backup for the primary server. A warm backup is a system that configured, *but not running*. It can be started in the event of primary server failure to reduce down time.

Upgrade Content Storage Format

Starting from version 6, Collaborator has a new file content storage format that works better with many file systems by having a deeper folder structure, reducing the number of files in each folder. By default all new installations of Collaborator server use the new file content storage format.

To upgrade the content storage format of existing installations of legacy (CodeCollaborator 5 and earlier) servers:

1. Stop the server if it is running.
2. Open the <Collaborator Server>/tomcat/collaborator-content-cache/cache.properties file.
3. Edit it as follows:

```
version=2
```

```
lazy-upgrade-from-version=1
```

4. Start the server.

The `cache.properties` file is a [Java properties file](#) having two configuration keys, `version` and `lazy-upgrade-from-version`. The `version` key determines whether to use the new format (2), or the old format (1) for storing new data. The `lazy-upgrade-from-version` key determines whether to search for and upgrade data stored in the old format (1), or not (blank).

3.2.4 Backup / Migration

Collaborator can be backed up while it is running. Also, there is a system for migrating data from one database to another.

Collaborator stores almost all data in the database initially set up for it. It also uses [file content storage](#)^[98] - a local directory that keeps copies of uploaded files. These are the two systems that need to participate in the backup/restore process.

Back Up Database

We recommend that you automate database backup process and perform it regularly.

The mechanism for backing up the database depends on the database. See the documentation for your database and use backup software designed to integrate with that.

Collaborator servers that use embedded database automatically create a daily database backup at 3 AM server time. This daily backups are stored in the file content storage (`installation-directory/tomcat/collaborator-content-cache/db_backups`). That is, on embedded databases you can just backup the content storage as described below.

There is an alternate method for backing up the database which is to perform the first half of a [database migration](#)^[98] and save the migration data file.

Back Up File Content Storage

The default location of [file content storage](#)^[98] - a local directory that keeps copies of uploaded files - is listed below (however, the default location can be changed by the system administrator):

```
installation-directory/tomcat/collaborator-content-cache
```

Typically, a backup mechanism will either copy this directory elsewhere or will keep a zip or other compressed archive file updated with the contents. You can do this while Collaborator is running, although most backup mechanisms will run at off-peak hours.

Files in this cache are stored in such a way that a file is written *only once* and thereafter is never changed. This means incremental backups of the directory are particularly easy -- only new files must be copied. Most file-copy utilities have a mode that means "only copy new files".

Restore a Back Up

To restore a Collaborator installation, first restore the database as directed in your database documentation. Then, install the Collaborator server software. Finally, restore the contents of the collaborator-content-cache directory in the new installation directory. You can do this last step while Collaborator is running.

If you have used the database migration technique to back up the database, refer to steps 3-11 of [Restoring the Data Dump File](#)^[97] for instructions on migrating the database data.

Migrating Data Between Databases

Collaborator has a generic mechanism for migrating data between databases -- even if the databases are completely different types.

Applications of this migration technique include:

- migrating between the embedded database and one of the other databases when a trial moves to a production environment
- backing up a database in a database-independent and easily-inspected manner
- when we add support for a new database and you want to switch over to it
- we need to debug your database and you need to send a "dump" of your data to SmartBear [Technical Support](#)^[162]

NOTE: Each license key is linked to the node ID, and it gets carried over during server migration. Therefore, a new license key is not needed when migrating the server.

There are two halves to the migration process: Creating the migration data dump file, and "restoring" the data dump file into a Collaborator installation.

1. Creating the Migration Dump File

Note: If your Collaborator server runs on a 32-bit Java virtual machine, set any non-blank value to the `com.smartbear.ccollab.datamodel.manager.chunk.for.32.jdk` setting in the [ccollab-server.vmoptions](#)^[1093] file and restart the server, before creating a dump file.

To create the migration data dump file, log into the Collaborator web server, and click the System link at the bottom of the screen:



Support until 2020-02-28 | **System** | 11.4.11400 | © 2005-2018 [SmartBear Software, Inc.](#)

Near the top of the screen is a form and a button which will allow you to download a whole system dump:

Server Backup/Debugging Dump

Use this form to produce a Zip file containing all server data, useful for backup or debugging.

Data Format:	Normal <input type="button" value="v"/> Selecting "obfuscated" will cause all file content, user names, file paths, and other potentially sensitive information to be replaced with gibberish or generic text (e.g. User1, User2). Normally you shouldn't use this mode, but it can be useful when creating data dumps that will be sent to SmartBear technical support if there is a security concern.
Server Logs:	Include server logs <input type="button" value="v"/> Warning: including all server logs increases how long it takes to generate the dump file and will increase the size of the dump file.
File Contents:	No file content <input type="button" value="v"/> Warning: including all file content can result in a multi-gigabyte dump file.
Which Data:	Complete database dump <input type="button" value="v"/> Getting just the system configuration is useful if you want to "start over" with the same basic configuration but with no reviews.

DOWNLOAD DUMP FILE

It contains the following settings:

Data Format:	<i>Normal</i> - Leaves the data as is.
Server Logs:	Specifies whether to include server logs in dump file. Note: If you are creating a dump file to send to technical support, it is important to include the server logs.
File Contents:	<i>No file content</i> - Do not include file content. : <i>Include all file content</i> - Include all file content. This may generate huge dump file and cause a longer download.
Which Data:	<i>Complete database dump</i> - This must be selected for a whole system dump. <i>System configuration only - no review data</i> - Selecting this will only save the system settings.

Once you have filled out the form, click the "**Download Dump File**" button to download the database dump file. This is a ZIP file containing all your database data in a platform- and database-independent XML format, plus additional files that describes your server environment.

2. Restoring the data dump file

Loading this data into another Collaborator installation requires some effort. This process is intentionally complex to prevent accidental destruction of real data.

Below are the steps to restoring a database migration data dump file:

1. Verify your Collaborator Server install.

Make sure the Collaborator server version and build number are identical between the server that created the data dump file and the server that is loading it. If the versions do not match exactly, the restore might not succeed. SmartBear maintains installers for previous versions of the server if you need one. You can always upgrade to another version after the migration.

Be sure when running the installer, you give the correct connection parameters to point the server to the database to which you plan to migrate. Note: Even if the Collaborator Server install location is not changing, you will still need to rerun the installer to point Collaborator to the correct database.

Once the install is complete, a browser window should open. Do NOT initialize the database as prompted in the browser.

2. Move the dump file into a known location. In this example we will assume the location is:

```
c:\temp\ccollab-dump.zip
```

3. On a 32-bit Java virtual machine, set maximum Java heap size to 1.5Gb or above (`-Xmx1500M`) in the `ccollab-server.vmoptions`^[1100] file.
4. Make sure the Collaborator server where you will load the dump is not running. This will not work on a running server.
5. Open the Tomcat session configuration file located here:

```
installation-directory/tomcat/conf/Catalina/localhost/ROOT.xml
```

6. Find the parameter called database-migration-data-path, or create one if it does not already exist. It should look something like this:

```
<Parameter name="database-migration-data-path" value="c:\temp  
\ccollab-dump.zip" override="false" />
```

7. Make sure the value string matches the location of the dump file, as in the example above. Use an absolute file path.
8. Save the configuration file.
9. Use a database administration tool to make sure the database configured for use with Collaborator has no tables in it. If there are any tables in the database the restore will not work. This prevents accidental restoring over an existing database.
10. Start the Collaborator server.

11. The server will automatically load the data from the database migration data dump file. If there were any problems with migration, you will see a helpful error message in the [server log](#)^[166]. The server will also log progress reports as data is loaded up, so if you have a large database and you wish to monitor migration progress you can "tail" the log file to see what's happening. Loading migration data can take a long time, so be patient!

12. Upon starting after restoring a migrated database, email notifications will be disabled. This is to prevent users from receiving spurious duplicate email notifications when administrators restore into test configurations. You may re-enable email notifications from the [email administration page](#)^[189].

3.2.5 Security Considerations

Collaborator administrators need to be aware of several security issues and options which affect the overall security of the system. This section covers those issues.

- [Built-in Administrator Account](#)^[99]
- [File System Security](#)^[99]
- [HTTP Transport Security](#)^[99]
- [User Session Information Storage / Cookies](#)^[100]
- [Obfuscating Database Passwords](#)^[100]
- [Obfuscating LDAP Passwords](#)^[103]

Built-in Administrator Account

Each Collaborator server has a built-in administrator account "admin". By default its password is "admin". To improve security, you will need to specify your own password for the built-in administrator account in the [Users](#)^[206] category of Collaborator settings.

File System Security

Collaborator relies on the underlying operating system as a foundation for overall system security. Several potentially sensitive items are stored in the local file system, including database credentials, LDAP credentials (if used), and file contents. Care should be taken to maintain system security of the server's operating system, so this information is not compromised. SmartBear does not have any specific security expertise, so we recommend you follow the guidance of your operating system's vendor.

HTTP Transport Security

By default, the Collaborator server operates over regular HTTP. This means that all communications between clients and servers are unencrypted on the wire. Therefore, it is possible for someone with access to the network to use network sniffing tools to gather information from that traffic. Some things that are available over the wire are file contents, user conversations, and even authentication credentials (usernames and passwords). If wire-level security is a concern, administrators should configure the server to use [secure http \(HTTPS\)](#)^[117]. Enabling HTTPS, also adds the "Secure" attribute to the browser's session cookies, that is, they can only be transmitted over an HTTPS connection.

User Session Information Storage / Cookies

There are two cookies that store user login and session information (`CodeCollaboratorLogin` and `CodeCollaboratorTicketId` respectively). The expiration date of the session cookies is so far in the future that they will never expire, but there is a server setting that overrides that expiration date and controls the length of time that the session is valid. This setting is called "[Login Ticket Time-To-Live](#)^[185]" and can be configured by the Collaborator admin. This setting is not an idle timeout; it is an absolute time the ticket will remain valid after it is created.

The application server-managed session cookie, `JSESSIONID`, is only valid during the session and it is used to identify the session, but it does not contain any user information. We also store some WebUI preferences locally, but that data also does not contain any user information.

All session cookies have the "HTTPOnly" attribute set, which means that these cookies can only be used by web browsers, and cannot be accessible via scripts or by other means.

Obfuscating Database Passwords

Some environments dictate that sensitive passwords stored in configuration files be obfuscated. In the case of Collaborator, this most commonly occurs in conjunction with the database connection information stored in `<server install path>/tomcat/conf/Catalina/localhost/ROOT.xml`.

Starting in Collaborator 8.4.8403, obfuscating the database password has *preliminary* support as a post-install operation. Three forms of obfuscation are supported: base64 encoding, base64-encoded AES 128 bit and base64-encoded AES 256 bit. AES obfuscation uses ECB mode with a fixed key and PKCS#5 padding.

Of the three forms, base64-encoding is the recommended process, if sufficient, as it is simpler.

Note: To use AES-256 bit obfuscation additional files are required.

Due to the import restrictions of some countries, Java SE have built-in restrictions on available cryptographic strength. Cryptographic strength can be configured via jurisdiction policy files that can be downloaded separately. In order to use AES-256 bit obfuscation, you will need to download and install Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files from Oracle web site: [Java Cryptography Extension for JRE 7](#) and [Java Cryptography Extension For JRE 8](#).

Base64 obfuscation:

1. Stop your Collaborator server instance. See [Platform-Specific Notes](#)^[84] for instructions for Windows, Linux, Solaris and BSD platforms.
2. Open the `<server install path>/tomcat/conf/Catalina/localhost/ROOT.xml` file in your chosen text editor.

3. Locate the `<Resource ... />` XML tag. This tag declares the database configuration of your Collaborator server.

4. Append the "factory" attribute to the Resource tag:

```
<Resource ... factory="com.smartbear.ccollab.
CollaboratorBasicDataSourceFactory"/>
```

5. Using the tool of your choice, generate a base64-encoded version of your database password (as found in the "password" attribute of the Resource tag). Many base64-capable tools and online encoder/decoder interfaces exist, a web search for "base64 encode" should prove illuminative.

6. Prepend the encoded string with "\$1\$". This indicates to Collaborator that plain base64 encoding is being used. For example, the existing password "testpass" would become "\$1\$dGVzdHBhc3M=".

7. Replace the value of the existing "password" attribute with the string composed in the prior step. The Resource tag will look similar to:

```
<Resource ... password="$1$dGVzdHBhc3M=" factory="com.smartbear.
ccollab.CollaboratorBasicDataSourceFactory"/>
```

8. Save the `ROOT.xml` file.

9. Restart your Collaborator server instance. The server should come up without issue with the obfuscated password.

AES-128 obfuscation:

Note: base64 is recommended due to simplicity unless your environment absolutely requires this level of obfuscation.

1. Stop your Collaborator server instance. See [Platform-Specific Notes](#)^[84] for instructions for Windows, Linux, Solaris and BSD platforms.

2. Open the `<server install path>/tomcat/conf/Catalina/localhost/ROOT.xml` file in your chosen text editor.

3. Locate the `<Resource ... />` XML tag. This tag declares the database configuration of your Collaborator server.

4. Append the "factory" attribute to the Resource tag:

```
<Resource ... factory="com.smartbear.ccollab.
CollaboratorBasicDataSourceFactory"/>
```

5. Using the command line interface, in the `<server install path>/tomcat/` directory of your Collaborator instance, execute the following command line:

```
java -cp webapps/ROOT/WEB-INF/classes;webapps/ROOT/WEB-INF/lib/*;lib/
tomcat-dbcp.jar;bin/tomcat-juli.jar com.smartbear.ccollab.
CollaboratorBasicDataSourceFactory
```

(On windows platforms, replace ":" in the command above with ";".)

6. Enter your password when prompted and specify the encoding format as "aes128". The program will then output the encoded string, which has a prefix of "\$2\$" to indicate that AES-128 obfuscation is being used. For example, the pre-obfuscation password "testpass" would become "\$2\$Nobujw9X9ZJsSOYapNZh+w==".
7. Replace the value of the existing "password" attribute with the string composed in the prior step. The Resource tag will look similar to:

```
<Resource ... password="$2$Nobujw9X9ZJsSOYapNZh+w==" factory="com.
smartbear.ccollab.CollaboratorBasicDataSourceFactory"/>
```

8. Save the ROOT.xml file.
9. Restart your Collaborator server instance. The server should come up without issue with the obfuscated password.

AES-256 obfuscation:

Note: base64 is recommended due to simplicity unless your environment absolutely requires this level of obfuscation.

1. To enable AES-256 encryption you need to install Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files. They can be downloaded from the Oracle's website: [Java Cryptography Extension for JRE 7](#) and [Java Cryptography Extension For JRE 8](#). Download and install the JCE package as described in the README.TXT file shipped within the downloaded archive.
2. Stop your Collaborator server instance. See [Platform-Specific Notes](#)^[84] for instructions for Windows, Linux, Solaris and BSD platforms.
3. Open the <server install path>/tomcat/conf/Catalina/localhost/ROOT.xml file in your chosen text editor.
4. Locate the <Resource ... /> XML tag. This tag declares the database configuration of your Collaborator server.
5. Append the "factory" attribute to the Resource tag:

```
<Resource ... factory="com.smartbear.ccollab.
CollaboratorBasicDataSourceFactory"/>
```
6. Using the command line interface, in the <server install path>/tomcat/ directory of your Collaborator instance, execute the following command line:

```
java -cp webapps/ROOT/WEB-INF/classes;webapps/ROOT/WEB-INF/lib/*;lib/
tomcat-dbcp.jar;bin/tomcat-juli.jar com.smartbear.ccollab.
CollaboratorBasicDataSourceFactory
```

(On windows platforms, replace ":" in the command above with ";".)

7. Enter your password when prompted and specify the encoding format as "aes256". The program will then output the encoded string, which has a prefix of "\$3\$" to indicate that AES-256 obfuscation is being used. For example, the pre-obfuscation password "testpass" would become "\$3\$w8MhPu6t7vobGeNvTx8RoA==".
8. Replace the value of the existing "password" attribute with the string composed in the prior step. The Resource tag will look similar to:

```
<Resource ... password="$3$w8MhPu6t7vobGeNvTx8RoA==" factory="com.
smartbear.ccollab.CollaboratorBasicDataSourceFactory"/>
```
9. Save the ROOT.xml file.
10. Restart your Collaborator server instance. The server should come up without issue with the obfuscated password.

Obfuscating LDAP Passwords

Starting in Collaborator 8.5.8501, LDAP passwords may be obfuscated in a similar fashion to the database password above. Three forms of obfuscation are supported: base64 encoding, base64-encoded AES 128 bit and base64-encoded AES 256 bit. AES obfuscation uses ECB mode with a fixed key and PKCS#5 padding.

Of the three forms, base64-encoding is the recommended process, if sufficient, as it is simpler.

Note: To use AES-256 bit obfuscation additional files are required.

Due to the import restrictions of some countries, Java SE have built-in restrictions on available cryptographic strength. Cryptographic strength can be configured via jurisdiction policy files that can be downloaded separately. In order to use AES-256 bit obfuscation, you will need to download and install Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files from Oracle web site: [Java Cryptography Extension for JRE 7](#) and [Java Cryptography Extension For JRE 8](#).

Base64 obfuscation:

1. Stop your Collaborator server instance. See [Platform-Specific Notes](#)^[84] for instructions for Windows, Linux, Solaris and BSD platforms.
2. Open the <server install path>/tomcat/conf/Catalina/localhost/ROOT.xml file in your chosen text editor.

3. Locate the `<Realm ... />` XML tag. This tag declares the LDAP (JNDI) authentication resource that Collaborator uses.
4. Change the "className" attribute of the Realm tag to "com.smartbear.ccollab.auth.CollaboratorJNDIRealm":

```
<Realm ... className="com.smartbear.ccollab.auth.CollaboratorJNDIRealm"/>
```

5. Using the tool of your choice, generate a base64-encoded version of your database password (as found in the "connectionPassword" attribute of the Realm tag). Many base64-capable tools and online encoder/decoder interfaces exist, a web search for "base64 encode" should prove illuminative.
6. Prepend the encoded string with "\$1\$". This indicates to Collaborator that plain base64 encoding is being used. For example, the existing password "testpass" would become "\$1\$dGVzdHBhc3M=".
7. Replace the value of the existing "connectionPassword" attribute with the string composed in the prior step. The Realm tag will look similar to:

```
<Realm ... className="com.smartbear.ccollab.auth.CollaboratorJNDIRealm" connectionPassword="$1$dGVzdHBhc3M="/>
```

8. Save the `ROOT.xml` file.
9. Restart your Collaborator server instance. The server should come up without issue with the obfuscated password.

AES-128 obfuscation:

Note: base64 is recommended due to simplicity unless your environment absolutely requires this level of obfuscation.

1. Stop your Collaborator server instance. See [Platform-Specific Notes](#)^[84] for instructions for Windows, Linux, Solaris and BSD platforms.
2. Open the `<server install path>/tomcat/conf/Catalina/localhost/ROOT.xml` file in your chosen text editor.
3. Locate the `<Realm ... />` XML tag. This tag declares the LDAP (JNDI) authentication resource that Collaborator uses.
4. Change the "className" attribute of the Realm tag to "com.smartbear.ccollab.auth.CollaboratorJNDIRealm":

```
<Realm ... className="com.smartbear.ccollab.auth.CollaboratorJNDIRealm"/>
```

- Using the command line interface, in the `<server install path>/tomcat/` directory of your Collaborator instance, execute the following command line:

```
java -cp webapps/ROOT/WEB-INF/classes;webapps/ROOT/WEB-INF/lib/*;lib/tomcat-dbc.jar;bin/tomcat-juli.jar com.smartbear.ccollab.CollaboratorBasicDataSourceFactory
```

(On Windows platforms, replace ":" in the command above with ";")

- Enter your password when prompted and specify the encoding format as "aes128". The program will then output the encoded string, which has a prefix of "\$2\$" to indicate that AES-128 obfuscation is being used. For example, the pre-obfuscation password "testpass" would become "\$2\$Nobujw9X9ZJsSOYapNZh+w==".
- Replace the value of the existing "connectionPassword" attribute with the string composed in the prior step. The Realm tag will look similar to:

```
<Realm ... className="com.smartbear.ccollab.auth.CollaboratorJNDIRealm" connectionPassword="$2$Nobujw9X9ZJsSOYapNZh+w==" />
```

- Save the `ROOT.xml` file.
- Restart your Collaborator server instance. The server should come up without issue with the obfuscated password.

AES-256 obfuscation:

Note: base64 is recommended due to simplicity unless your environment absolutely requires this level of obfuscation.

- To enable AES-256 encryption you need to install Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files. They can be downloaded from the Oracle's website: [Java Cryptography Extension for JRE 7](#) and [Java Cryptography Extension For JRE 8](#). Download and install the JCE package as described in the README.TXT file shipped within the downloaded archive.
- Stop your Collaborator server instance. See [Platform-Specific Notes](#)^[84] for instructions for Windows, Linux, Solaris and BSD platforms.
- Open the `<server install path>/tomcat/conf/Catalina/localhost/ROOT.xml` file in your chosen text editor.
- Locate the `<Realm ... />` XML tag. This tag declares the LDAP (JNDI) authentication resource that Collaborator uses.
- Change the "className" attribute of the Realm tag to "com.smartbear.ccollab.auth.CollaboratorJNDIRealm":

```
<Realm ... className="com.smartbear.ccollab.auth.
CollaboratorJNDIRealm"/>
```

6. Using the command line interface, in the <server install path>/tomcat/ directory of your Collaborator instance, execute the following command line:

```
java -cp webapps/ROOT/WEB-INF/classes;webapps/ROOT/WEB-INF/lib/*;lib/
tomcat-dbc.jar;bin/tomcat-juli.jar com.smartbear.ccollab.
CollaboratorBasicDataSourceFactory
```

(On Windows platforms, replace ":" in the command above with ";".)

7. Enter your password when prompted and specify the encoding format as "aes256". The program will then output the encoded string, which has a prefix of "\$3\$" to indicate that AES-256 obfuscation is being used. For example, the pre-obfuscation password "testpass" would become "\$3\$w8MhPu6t7vobGeNvTx8RoA==".
8. Replace the value of the existing "connectionPassword" attribute with the string composed in the prior step. The Realm tag will look similar to:

```
<Realm ... className="com.smartbear.ccollab.auth.
CollaboratorJNDIRealm" connectionPassword="$3$w8MhPu6t7vobGeNvTx8RoA==" />
```

9. Save the ROOT.xml file.
10. Restart your Collaborator server instance. The server should come up without issue with the obfuscated password.

3.2.6 LDAP and Active Directory Authentication

By default the Collaborator server authenticates users against the users in its database. For large organizations with hundreds or thousands of users in multiple product groups, it is simply impractical to add each would-be Collaborator user to the database. For this reason, Collaborator can integrate with an existing LDAP directory or Active Directory to perform user authentication.

Note: LDAP/AD authentication is supported in Collaborator Team and Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)³⁷.

When LDAP authentication is configured, Collaborator authenticates users attempting to login against their entry in the directory. When a user [logs in](#)²⁸⁹ for the first time, a user account is created for them automatically in Collaborator to store their user preferences. Users must be authenticated by logging into the Collaborator server through the web client before they will be able to work via GUI client, command-line interface and other clients.

Warning: Only users with accounts can be assigned to roles within reviews, so it is not possible to add a user to a review who has not previously logged in to Collaborator.

Internally, Collaborator uses the [Tomcat Servlet Container's](#) JNDI Realm for LDAP authentication. For a detailed description of how it works and for complete configuration information, consult the [JNDI Realm Documentation](#).

LDAP Authentication

The [installation wizard](#)^[68] provides a screen to perform basic configuration of LDAP authentication. This wizard minimally configures Collaborator to use LDAP authentication. For advanced configuration, see [Advanced Configuration](#)^[109].

When LDAP authentication is selected, you are prompted for the following items:

Setup - Collaborator Server 11.5.11502

Configure LDAP Authentication
How will Collaborator connect to LDAP?

* LDAP Connection URL:

* User Pattern:

When using LDAP authentication, Collaborator requires one user be designated the System Administrator. This user will be allowed to login to administer the system even when it is unlicensed.

* System Administrator:

* Administrator Password

* indicates a required field.

More information about configuring LDAP with Collaborator is available in the [Owner's Manual](#).

< Back Next > Cancel

- **LDAP Connection URL** - This is a URL where Collaborator can connect to the LDAP server. The format of the URL is as follows: `ldap://servername:port`
The standard default port for LDAP is 389.
- **User Pattern** - This string instructs &product-name; how to locate a user within LDAP. The format of the string is the same as the LDAP-distinguished name of a user with the username replaced with the {0} string. For example, `uid={0},ou=people,dc=mycompany,dc=com`

- **System Administrator** - The LDAP account of a user who will be Collaborator server administrator. For example, if your LDAP distinguished name is `uid=jsmith,ou=people,dc=mycompany,dc=com`, then your LDAP account is `jsmith`. The Collaborator server administrator will always be able to log in and administer license codes and user accounts. This account takes the place of the admin account when using internal authentication.

Active Directory Authentication

Microsoft Active Directory is an LDAP compliant directory and can be used to authenticate users to Collaborator. The [installation wizard](#)^[68] provides a screen to perform basic configuration of Active Directory authentication. This wizard minimally configures Collaborator to use AD authentication. For advanced configuration, see [Advanced Configuration](#)^[109].

When AD authentication is selected, you are prompted for the following items:

Setup - Collaborator Server 11.5.11502

Configure Active Directory Authentication

How will Collaborator connect to Active Directory?

* Connection URL:

* Connection User:

* Connection Password:

* User Base:

* User Search:

When using Active Directory authentication, Collaborator requires one user be designated the System Administrator. This user will be allowed to login to administer the system even when it is unlicensed.

* System Administrator:

* indicates a required field.

More information about configuring Active Directory and LDAP with Collaborator is available in the [Owner's Manual](#).

< Back Next > Cancel

- **Connection URL** - This is a URL where Collaborator can connect to the LDAP server. The format of the URL is as follows: `ldap://servername:port`. The standard default port for LDAP is 389.
- **Connection User** and **Connection Password** - The user name (in `DOMAIN\username` format) and password which Collaborator will use to connect to Active Directory to find the user records. If anonymous connections are allowed to your directory (not typical), then these attributes are not required.

- **User Base** - Specifies the starting point in the Active Directory for the subtree containing users.
- **User Search** - Specifies a search pattern of how to locate a user within the Active Directory, with {0} marking where the username should be substituted. For example, (`sAMAccountName={0}`). The filter may combine multiple conditions using Boolean operators: AND (needs to be SGML encoded to "&"; because the configuration file is an XML document); OR (|) and NOT (!).
- **System Administrator** - The LDAP account of a user who will be Collaborator server administrator. For example, if your LDAP distinguished name is `cn=jsmith,ou=people,dc=mycompany,dc=com`, then your LDAP account is `jsmith`
The Collaborator server administrator will always be able to log in and administer license codes and user accounts. This account takes the place of the admin account when using internal authentication.

Advanced Configuration

The basic configuration provided by the installer sets up the simplest possible LDAP or AD configuration. Many more sophisticated configurations are possible, but they may require manually editing the context configuration file (`<collab server install dir>/tomcat/conf/Catalina/localhost/ROOT.xml`), namely, the `Realm` configuration element which defines authentication information.

The [JNDI Realm Documentation](#) describes the different operational modes and explains each of the configuration attributes.

Performing the basic configuration in the installation wizard will result in the following values of the `Realm` element of `ROOT.xml` file.

LDAP:

```
<Realm className="org.apache.catalina.realm.JNDIRealm"
  connectionURL="ldap://mycompany.com:389"
  userPattern="uid={0},ou=people,dc=mycompany,dc=com"
  allRolesMode="strictAuthOnly"
/>
```

Active Directory:

```
<Realm className="org.apache.catalina.realm.JNDIRealm"
  connectionName="your_ldap_username"
  connectionPassword="xxxx"
  connectionURL="ldap://mycompany.com:389"
  referrals="follow"
```

```

    userBase="CN=Users,DC=mycompany,DC=com"
    userSearch="(sAMAccountName={0})"
    userSubtree="true"
    allRolesMode="strictAuthOnly"
  />

```

When using LDAP or Active Directory, please check that the "collaborator-authentication" parameter is "false":

```

<Parameter description="Is the Code Collaborator database used for authentication?" name="collaborator-authentication" override="false" value="false"/>

```

Warning: Modifying the `ROOT.xml` file will cause Tomcat to dynamically reload the Collaborator application, terminating any active sessions. Changes to `ROOT.xml` should be done in the context of stopping and restarting the Collaborator service (that is, in a production environment coordinating the restart with user activity), regardless of whether the service itself is actually stopped and restarted, or just reloaded by Tomcat.

Obfuscate LDAP Passwords

As a more secure alternative to storing LDAP passwords as plain text, you can obfuscate them. Collaborator supports two forms of obfuscation: base64 encoding, and base64-encoded AES. For instructions on enabling LDAP passwords obfuscation, see [Security Considerations](#)^[103].

Restrict Access

If you need to restrict access to Collaborator, we recommend that you configure your Realm definition to use `userSearch` for searching for user accounts rather than `userPattern` for direct bind (see [Active Directory Configuration](#)^[108] for examples). With `userSearch`, you can expand your search criteria to include only members of the specified group or groups. For example, the following `userSearch` would restrict access to only members of the `ccusers` security group:

```

userSearch="(& (sAMAccountName={0}) (memberOf=CN=ccusers,
OU=Security Groups,OU=Accounts and Groups,DC=xxxx,DC=xxxx,DC=com))"

```

Please note that the ampersand (&), needs to be SGML encoded to " & " because the configuration file is an XML document.

If you need to broaden the search criteria, you can use the OR operator, "|". For example, to allow users who are in group "foo" or group "bar" (or both), you might use:

```
userSearch="(& (sAMAccountName={0}) ( (memberOf=CN=foo,OU=groups,
DC=xxxx,DC=com) (memberOf=CN=bar,OU=groups,DC=xxxx,DC=com) ) )"
```

Above, the inner OR requires that the user be a member of group "foo" or group "bar". The outer AND ensures that that user's login also matches the one provided to the Collaborator login form.

Administrator Rights

When users first log in to Collaborator, their user account is created automatically, as a standard user account. It is possible to have users in certain roles (see Restricting Access above) to automatically receive administrator privileges. This configuration is done in the `<collab server install dir>/tomcat/conf/Catalina/localhost/ROOT.xml` file.

Near the bottom of the `ROOT.xml` file, there is a section of server parameters (Parameter XML elements). These are name-value pairs of configuration options. To configure certain LDAP groups to be assigned administrator rights, create an `admin-roles` parameter and for its value specify a pipe-separated ("|") list of LDAP group names. You must also add `'userRoleName="memberOf"'` to the Realm configuration. The `admin-roles` parameter requires an exact match, including case. New users that are members of the specified LDAP groups will be given administrator privileges when their accounts are created. Users that already have accounts in Collaborator will not automatically be promoted to administrator. Those privileges will need to be assigned manually from the `Admin` screen.

Secure LDAP (LDAPS)

Configuring Collaborator to communicate securely with an LDAP server using LDAPS (LDAP over SSL) can be done, but requires manual configuration outside of the installer wizard. To configure LDAPS, first install Collaborator configured for normal LDAP access. The service will start automatically upon completion of the install, so you will need to shut it down to continue configuration. Open the context configuration file (`<collab server install dir>/tomcat/conf/Catalina/localhost/ROOT.xml`) in a text editor and find the Realm configuration element. It will look something like the following:

```
<Realm className="org.apache.catalina.realm.JNDIRealm"
  connectionURL="ldap://localhost:389"
  userPattern="uid={0},ou=people,dc=mycompany,dc=com"
  allRolesMode="strictAuthOnly" />
```

If you are configuring Collaborator for use with Microsoft Active Directory using LDAPS, follow the [Active Directory instructions](#)^[108] to make a best effort to configure the realm for your Active Directory server. Do not worry if you do not get it exactly right or cannot test the connection because the server refuses insecure connections. That issue can be resolved once connectivity is established.

To the realm configuration above (or your Active Directory realm configuration), you will need to add an attribute 'protocol' with the value 'ssl' and you will probably need to change the 'connectionURL' attribute to an LDAPS url. The updated configuration below highlights the changes:

```
<Realm className="org.apache.catalina.realm.JNDIRealm"
  connectionURL="ldaps://localhost:636"
  userPattern="uid={0},ou=people,dc=mycompany,dc=com"
  allRolesMode="strictAuthOnly"
  protocol="ssl" />
```

Depending on the LDAP server's SSL certificates, this configuration *may* be enough to establish the connection. However, often companies generate their own SSL certificates signed by their own Certificate Authority (CA) certificate. Unless additional measures are taken, these certificates may not be trusted so Collaborator will still not connect to the LDAP server. To establish trust, you will need to create a "key store" and import the public key of either the Certificate Authority or the public key of the LDAP server as a trusted certificate. Obtain from your LDAP or network administrator the appropriate certificate file. Then using Java's keytool (located in `$JAVA_HOME/bin`), import the certificate into a key store for Collaborator using the following command:

```
keytool -import -alias ldapserver -keystore <collab serverinstall
dir>/tomcat/conf/collab.ks -trustcacerts
-file <path to chain certificate file>
```

Important: You will likely be prompted to confirm the validity of the certificate. It is imperative for the security of the overall system that you verify the key matches the trusted material. Before accepting the certificate, you should contact the administrator that sent you the certificates and verify that the certificate fingerprints that you see match the certificate fingerprints that they intended to send you. For more information on why this step is important, see the note in the [keytool documentation](#).

The final step is to configure Collaborator to use the newly created keystore. Open `<collab server install dir>/ccollab-server.vmoptions` in a text editor and add the following lines:

```
-Djavax.net.ssl.trustStore=<collab server install dir>/tomcat/conf/
collab.ks
-Djavax.net.ssl.trustStorePassword=<the password>
```

Upon restart, the Collaborator service should be connecting to the LDAP server via SSL. If you are still getting errors, check that the other LDAP configuration options have been configured correctly. If you are using Active Directory, it is now worth revisiting the Active Directory configuration above.

Finally, a note on troubleshooting SSL connections: adding the following line to the `ccollab-server.vmoptions` file will enable Java's network debug logging.

```
-Djavax.net.debug=all
```

Upon restarting Collaborator, this information will be written to `<collab server install dir>/output.log`. If you need assistance interpreting this log, contact [SmartBear Customer Support](#).

Note: Do not run in a production environment with network debug logging enabled. This will severely impact the performance of the system and will also consume vast quantities of disk space.

Synchronize Users and Groups

You may configure user and group synchronization between Collaborator and the LDAP directory or Active Directory. In this case, Collaborator will retrieve user properties (name, phone, email, and so forth) and their membership in groups when the users login. Additionally, you can select whether to create new groups automatically and specify regular expression for automatic group creation.

In order to enable synchronization on Active Directory systems, you will need to open the [LDAP Settings](#) tab of General settings, enable the respective properties and possibly adjust the attribute mapping configuration.

LDAP/AD attribute mapping	
Enable LDAP mapping:	Yes <input type="checkbox"/> Do you want to enable LDAP mapping?
Display name:	{displayName} Mapping of your LDAP/AD scheme attributes to the Display name
First name:	{givenName} Mapping of your LDAP/AD scheme attributes to the First name
Last name:	{sn} Mapping of your LDAP/AD scheme attributes to the Last name
Phone:	{telephoneNumber} mobile: {mobile} Mapping of your LDAP/AD scheme attributes to the Phone
Department:	{company} {department} Mapping of your LDAP/AD scheme attributes to the Department
Email:	{mail} Mapping of your LDAP/AD scheme attributes to the Email
Enable LDAP groups synchronization:	Yes <input type="checkbox"/> Do you want to enable LDAP group synchronization?
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

In order to perform synchronization on LDAP systems, you will need to configure the above-mentioned [LDAP Settings](#)^[188] and also need to modify the ROOT.xml. Namely, you will need to add the following fields: the `connectionName` and `connectionPassword` fields which define a user account the Collaborator will use to connect to LDAP to find the group membership user records, and the `roleBase` and `roleSearch` fields which define the base entry for the role search and the search filter for selecting role entries.

```
<Realm className="org.apache.catalina.realm.JNDIRealm"
  connectionName="cn=read-only-admin,dc=example,dc=com"
  connectionPassword="xxxx"
  connectionURL="ldap://xxxx.com:389"
  userPattern="uid={0},dc=example,dc=com"
  roleBase="dc=example,dc=com"
  roleSearch="(&objectClass=groupOfUniqueNames)(uniqueMember={0})"
  allRolesMode="strictAuthOnly"
/>
```

Technical details

For mapping user membership in groups Collaborator uses the group's fully qualified domain name (FQDN) retrieved from the LDAP or AD. It checks if some of existing [user groups](#)^[212] has matching FQDN and adds the user to this group on success. Otherwise, it can create new group (if automatic group creation is enabled and group name matches filter) and adds the user to the new group.

To name the new group Collaborator uses the first entry of group's fully qualified domain name (FQDN). For example, a group having the "ou= ccusers,dc=example,dc=com" FQDN will have the ccusers title. If some other group already has the same title, Collaborator will append the ordinal number to the group title: ccusers1, ccusers2 and so on.

On every login Collaborator checks existing groups created via LDAP or Active Directory synchronization and actualizes user membership in those groups. Such algorithm allows to keep a consistency between Collaborator and LDAP or Active Directory.

Troubleshooting LDAP:

The directory administrator that manages the directory will be a valuable resource in resolving the issue, either directly, or in conjunction with SmartBear's Customer Support team.

If the directory administrator is unavailable, SmartBear's Customer Support team can help you resolve configuration issues, but often do not have enough information about the directory schema, permissions, and so on, to efficiently resolve issues. We will walk you through several basic configurations that we have seen work with other directories. Having an LDAP browser tool available (there are many good free and commercial browsers available) when you call will help answer some of the questions required to properly configure your server. In some cases, we will still need to discuss details with your directory administrator.

There is a process that we go through to help people debug their LDAP issues. You can do it on your own (of course, if you get stuck you can always contact technical support). We recommend using the [JXplorer LDAP browser](#) for this task because it is a Java tool and as such it uses the same underlying LDAP library that Collaborator will use. Here is the process:

1. Download and install JXplorer, following the recommended installation guidelines.
2. Start up JXplorer.
3. From the File menu, choose Connect.
4. In the connect dialog ("Open LDAP/DSML Connection"), specify the following:

Host: the hostname portion of the connectionURL attribute from the Realm declaration in ROOT.xml.

Port: the port portion of the connectionURL attribute from the Realm declaration in ROOT.xml. Usually this is 389, which is the default if unspecified. Some Active Directory configurations require connecting to the "Global Catalog" which is port 3268 (you may see errors that say "DomainDnsZones.foo.bar.com" which means you need to use this port).

Base DN: The value of the userBase attribute from from the Realm declaration in ROOT.xml.

Security Level: User + Password

Security User: The value of the connectionName attribute from the Realm declaration in ROOT.xml. This should be a name that looks like an email address (jason@...) or something that looks like an LDAP distinguished name (uid=jason,ou=people,dc=mycompany,dc=com)

Security Password: The value of the connectionPassword attribute from the Realm declaration in ROOT.xml.

Click Ok to connect to establish the connection.

If the connection establishes normally, you should see the Explore tree populate with some nodes that represent entities in your directory. Note: You may see a Error that "Search partially failed!" This seems to be normal and is a consequence of the way Active Directory does its searching.

If the connection fails to establish normally, check the error message that explains the failure.

Is it a network issue? This could mean that the hostname or port number is wrong or that a firewall (local or on the network somewhere) is preventing the connection to the LDAP server. It could also mean that the LDAP server is simply offline. Double check your connection information and firewalls and if you still cannot connect, contact your LDAP administrator. (This error looks like: "Error opening connection: 192.168.10.441:389")

Is it a login issue? The specific error messages that come back will depend on the LDAP server in question, but if it is a "security" related message it probably means the user DN or password is wrong. Double check those and try to reestablish the connection. If that fails, perhaps the LDAP account does not exist or does not have query permissions on the directory. Consult your LDAP administrator for help getting the appropriate access. An example of an error message from an Active Directory server is as follows:

Error opening connection:

```
[LDAP: error code 49 - 80090308: LdapErr: DSID-0C090334, comment:
AcceptSecurityContext error, data 52e, vece
```

If it is neither of those issues, send the error message verbatim to SmartBear technical support (the JXplorer error dialog accepts Ctrl-C to copy the message to the clipboard), or consult Google or your LDAP administrator.

5. Once the connection is established, it is time to verify the search parameters. From the Search menu, select "Search Dialog".

6. In the Search dialog, confirm that the "Start Searching From" is set to the value of the userBase attribute from the Realm declaration in ROOT.xml.
7. Search Level should be set to "Search Full Subtree".
8. Select the "Text Filter" tab at the bottom of the search dialog.
9. Copy and paste the userSearch attribute from the Realm declaration in ROOT.xml into the text filter box (for example, (sAMAccountName={0})).
10. Replace the {0} with the value of a user that you expect to be able to login. For example, if the user would use the login jason and the filter is (sAMAccountName={0}), change this value to (sAMAccountName=jason).
11. Press the Search button. Exactly one result should be returned. If zero results are returned, then the query is at fault. Some possible causes:

The user name as substituted into the filter is incorrect.

The user does not exist or does not exist within the subtree rooted at userBase.

The filter itself is too restrictive. Filters can be arbitrarily complex with AND and OR clauses. If the filter is complex, we recommend simplifying the query down to only the username portion (the place where the {0} occurs) and verifying that portion and then building up the query to the ultimate query, verifying that at each step the user account is still findable.

If the user is returned and you know that user's password (for example, if it is the Code Collaborator administrator account), verify that the account can login using JXplorer.

12. Select the user from the results tree.
13. Select the Table Editor tab.
14. Copy the distinguishedName attribute to the clipboard.
15. From the File menu, select Connect. Follow the login procedure as above, substituting the user's distinguished name (on the clipboard) for User DN and that user's password for Password.

If that login fails, it is possible that the password is incorrect or has been changed or that the account has been disabled or locked. Consult with your LDAP administrator to confirm that the account has "bind access" as necessary.

3.2.7 Configuring HTTPS

The basic Collaborator installation configures the server to handle requests over standard HTTP. In many environments this is sufficient as the network is trusted. However some organizations require that all network applications are secured with Transport Layer Security (TLS) or Secure Sockets Layer (SSL). Collaborator supports HTTP over TLS (or HTTPS), but this requires additional manual server configuration:

What you need

Certificates

In order to authenticate to clients, the Collaborator server must have a "Certificate" that serves as proof of identity. Certificates come in two forms: Certificate Authority (CA) signed certificates and "self-signed" certificates. CA signed certificates provide an additional level of security because they can be automatically verified and do not rely on human verification. By providing you a certificate, the Certificate Authority is vouching for your identity. Software systems such as web browsers and the Java Runtime Environment (JRE) include the public keys of the trusted Certificate Authorities that are used to verify server certificates were vouched for by a trusted CA. To acquire a CA signed certificate, contact the appropriate person in your IT department.

Self-signed certificates have the advantages of being free and easy to generate. The disadvantage of self-signed certificates is that they cannot be automatically verified. Instead, their security relies on users verifying the certificate signature against a signature obtained through another, ideally secure, channel.

Keystores

A keystore is Java's mechanism for storing cryptographic keys and certificates. The persistent form of a keystore is a password protected file on disk. A keystore may contain "key entries" that allow applications with access to the keystore to authenticate themselves to users or other services. A keystore is also used to store "trusted certificate entries" that contain the public keys of services that are trusted and certificate authorities that are trusted to vouch for services.

To enable HTTPS in Collaborator, you will need to create a keystore with the server's certificate (either CA- or self-signed) and if CA-signed, the certificate authority's "chain certificate". Follow the instructions below to create a keystore with the type of certificate you will be using to secure Collaborator.

Creating a keystore for Collaborator

Creating a private key and certificate in your keystore

To get started, you must use Java's keytool command (located in \$JAVA_HOME/bin). Running keytool as follows will create a new private key and install a self-signed certificate:

```
keytool -genkeypair -alias tomcat -keyalg RSA -validity 360 -keysize  
2048 -keystore <collab server install dir>/tomcat/conf/collab.ks
```

You will be prompted to answer a series of questions. When you are prompted to enter your first and last name, enter the host and domain name you intend to use to address the Collaborator server instead. For example:

```
What is your first and last name?  
[Unknown]: collab.aus.smartbear.com
```

Once you complete the rest of the prompts and assigned a password to the keystore, you have created a private key and a self-signed certificate. Be sure to remember the keystore password you set, as you must include it in your server configuration.

For many organizations, this is sufficient to guarantee security. However, web browsers and the Collaborator client will request confirmation from end users, unless the certificate is not signed by an existing certificate authority. You can read more about this process in the "Accepting Self-Signed Certificates" section at the bottom of this page.

If you wish to have a certificate authority sign your server certificate, please follow the steps outlined in "Creating a CSR" below.

Creating a CSR (Certificate Signing Request)

Once the steps above have been followed, you can create a certificate signing request with the following command:

```
keytool -certreq -alias tomcat -keystore <collab server install dir>/  
tomcat/conf/collab.ks -file tomcat.csr
```

You will be prompted to enter the keystore password. This should create a file named "tomcat.csr" which you will need to provide to your signing authority. This may be Verisign, Thawte, another certificate vendor, or a group internal to your organization. Once they have verified the information provided, the signing authority will send you a certificate file.

Importing CA-signed Certificates

If you are using a CA-signed certificate, you will need the server certificate and the CA's chain certificate (or root certificate). The CA chain certificates are publicly available, but the instructions for acquiring them vary by certificate authority. To get the CA chain certificate, inquire of the IT person in your organization responsible for procuring SSL certificates for services. Once you have the certificates, import them into a new keystore using the Java "keytool" program (located in \$JAVA_HOME/bin).

To import the CA chain certificate:

```
keytool -importcert -alias root -keystore <collab server install dir>/tomcat/conf/collab.ks -trustcacerts -file <path to chain certificate file>
```

To import the server certificate:

```
keytool -importcert -alias tomcat -keystore <collab server install dir>/tomcat/conf/collab.ks -trustcacerts -file <path to server certificate file>
```

Remember the keystore password you select, as you will need this when configuring the Collaborator server.

Alternate method to import server and chain certificate simultaneously

Some popular signature authorities now provide both a primary and intermediate certificate. The steps below may work more effectively in those cases than the steps above.

First, assemble a single file containing all of the certificates (primary, intermediate, and server) provided to you by your signature authority.

On UNIX systems:

```
cat primary.cert intermediate.cert tomcat.cert > combined.txt
```

On Windows, you will likely want to use notepad and simply copy and paste all of the provided certificates into a single file. Save that file as combined.txt. Once you have that, run the following command:

```
keytool -importcert -alias tomcat -keystore <collab server install dir>/tomcat/conf/collab.ks -trustcacerts -file combined.txt
```

This will import all three (or more) certificates at the same time, establishing the correct chain of trust.

Configuring the Collaborator Server

The final step in configuring the Collaborator server is to instruct the server to use SSL and tell it what certificates to use. This is done by editing the `server.xml` file located in `<collab server install dir>/tomcat/conf`. In `server.xml`, locate the "Connector" element and **replace it** with the following:

```
<Connector protocol="org.apache.coyote.http11.Http11Protocol"
port="8443" enableLookups="true" disableUploadTimeout="true"
acceptCount="100" maxThreads="100"
scheme="https" secure="true"
SSLEnabled="true" sslEnabledProtocols="TLSv1.2,TLSv1.1,TLSv1"
keystoreFile="conf/collab.ks" keystorePass="<the keystore password>"
clientAuth="false" sslProtocol="TLS"/>
```

Tip: If you need to specify a full path to the keystore file in the server.xml then use the file protocol notation:

```
keystoreFile="file:///c:/program%20files/collaborator%20server/
tomcat/conf/collab.ks"
```

Note, you will need to replace the keystore password in the above XML snippet.

Restart the server and it will be operating over SSL on port 8443.

Be sure to update the [External URL](#)¹⁶⁹ in the server settings to reflect the correct https URL and enable the [Secure authentication cookies](#)¹⁸⁵ setting to send login cookies over HTTPS.

Impact on Clients

After you have generated the keys for the server, you may wish to distribute a keystore and its signature to users so they can validate the certificate when asked. To do this, first export the certificate to a file:

```
keytool -exportcert -keystore <collab server install dir>/tomcat/
conf/collab.ks -alias tomcat > <export path>collab.cert
```

Then print the certificate information that you will need to distribute. Of particular interest are the fingerprints. To do this, run keytool as below:

```
keytool -printcert -file collab.cert
```

This will print something like the following:

```
Owner: CN=collab.aus.smartbear.com, OU=SmartBear, O=SmartBear,
L=Austin, ST=TX, C=US
Issuer: CN=collab.aus.smartbear.com, OU=SmartBear, O=SmartBear,
L=Austin, ST=TX, C=US
Serial number: 463251eb
```

```
Valid from: Fri Apr 27 14:41:31 CDT 2007 until: Thu Jul 26 14:41:31  
CDT 2007
```

```
Certificate fingerprints:
```

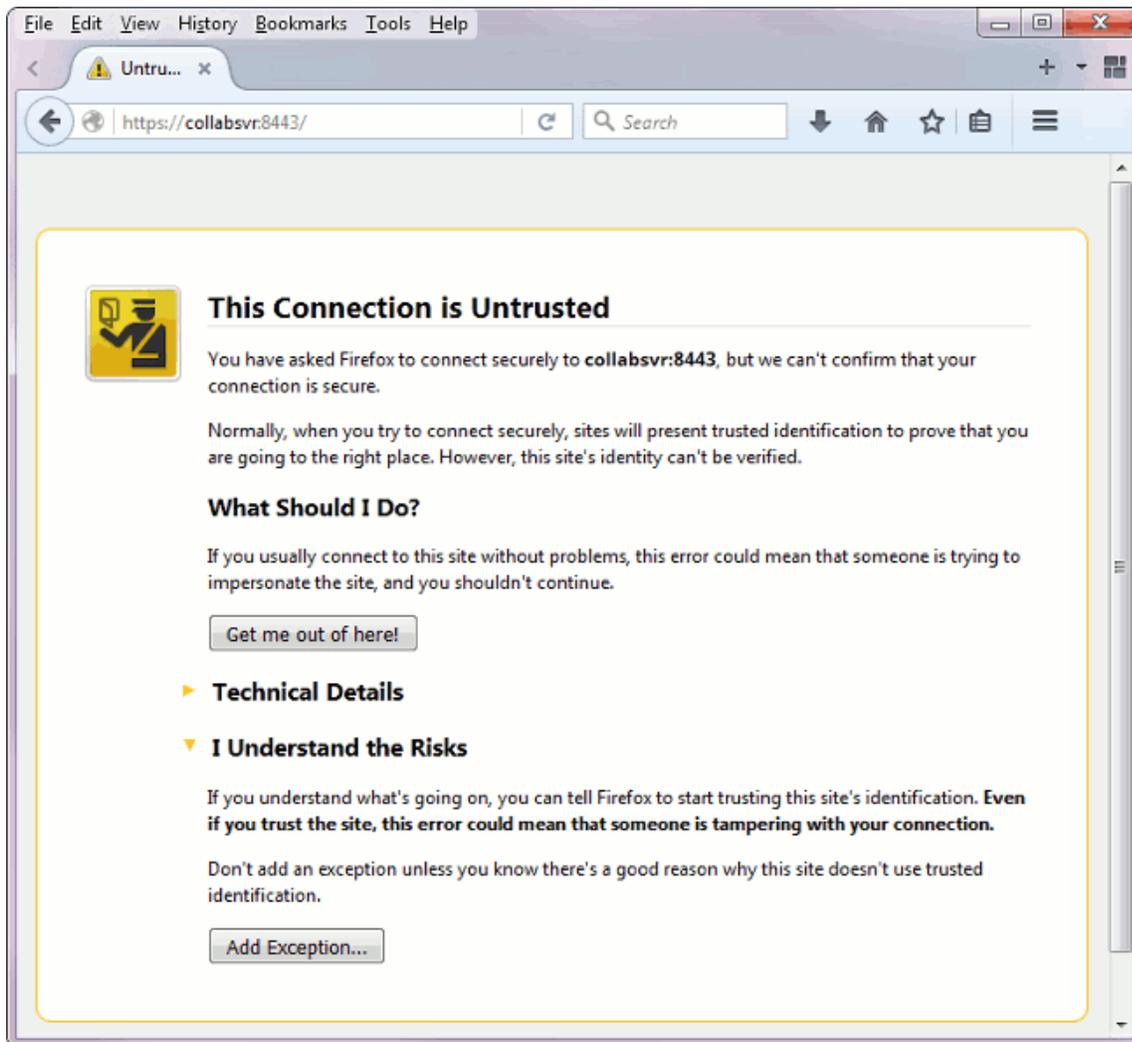
```
MD5: 67:D7:74:5E:72:9D:B2:82:88:3F:33:AA:A0:41:01:F0
```

```
SHA1: E2:4A:1F:9B:9A:38:0F:6B:7B:33:12:73:1B:50:76:30:AC:A6:B2:EA
```

If the certificate used to secure Collaborator is a CA signed certificate from a trusted CA, there will be very little impact on users. The only thing that they must do is [configure their clients](#)⁴³² with the correct HTTPS url.

If you are using a self-signed certificate or the certificate cannot be automatically verified, users will be asked to verify the certificate by comparing its signature to the published signatures for the service. The exact nature of this confirmation varies by client, but the process is the same: look at the certificate the server presents and confirm that its signature matches the published signature.

In the web browser, the certificate confirmation dialog looks something like this:



The above screenshot is from Firefox, but other browser users will see a similar dialog. The users will need verify that the fingerprint (or signature) of the certificate by comparing it to the signature of that you distributed for the server.

Certificates that are accepted permanently are stored in a local keystore in `$HOME/.smartbear/trustedcertificates`. This file can safely be deleted to remove all trusted certificates. If this is done, the user will have to reauthorize any certificates that are self-signed (or signed by a CA that is not in the Java trusted keystore).

If you want each client to automatically recognize and authorize your internal CA without being prompted to do so, one solution is to accept the key with one client, and then distribute the `trustedcertificates` file that is generated.

To reiterate, the default location for Unix clients is: `~/.smartbear/trustedcertificates` and for Windows clients: `%USERPROFILE%\smartbear\trustedcertificates`

If you are capable of distributing files to all user's machines, distributing that file to those locations will prevent remaining users from seeing the prompt.

Unlike other clients, Collaborator Visual Studio Extension cannot read certificates from Java keystore. Therefore, to work with HTTPS servers from Collaborator Visual Studio Extension, users should manually install the server's certificate into Windows keystore.

Note on self-signed certificates: You have to use certificate signed with Certificate Authority (CA). It can be any CA - even yourself. And you must install that CA certificate in trusted authorities. You cannot use self-signed certificate directly.

See detailed instructions in the [Configuring HTTPS Connection](#)^[51] section of Visual Studio Extension Configuration.

Additional Resources

- [Tomcat SSL Configuration HOW-TO](#)
- [Tomcat HTTP Connector Configuration](#)
- [keytool - Java Key and Certificate Management Tool](#)

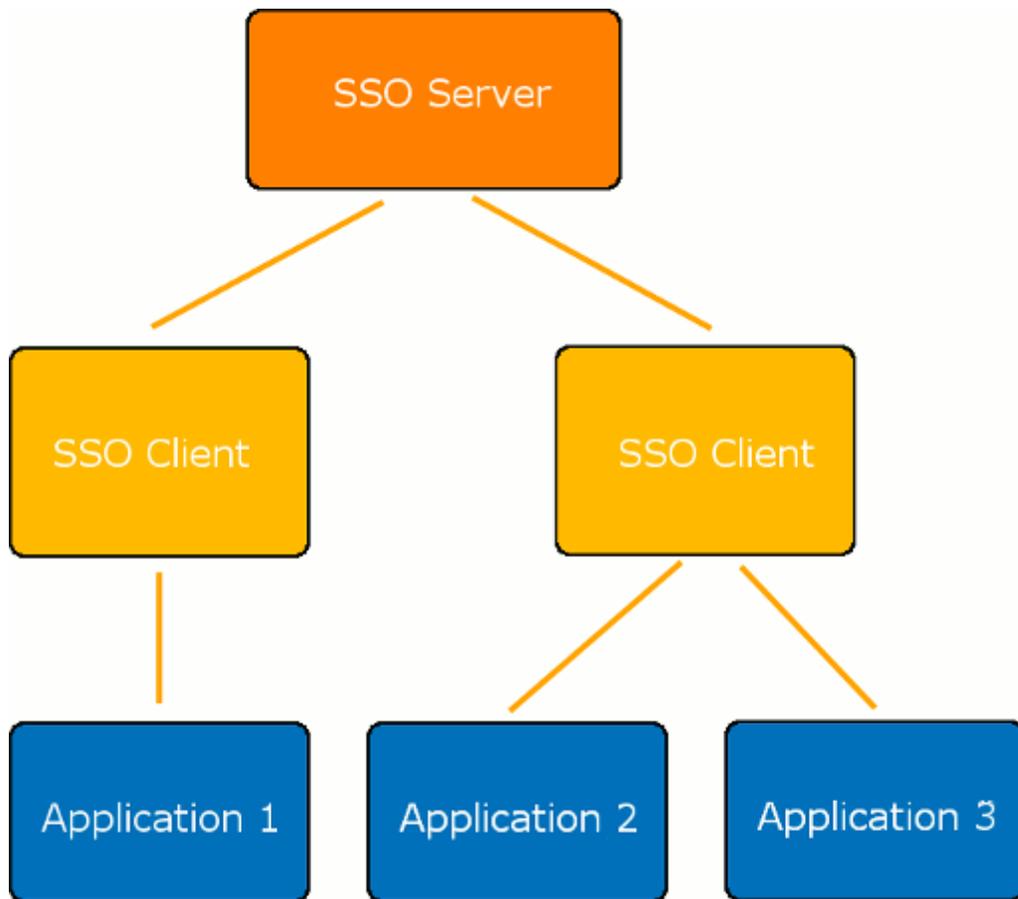
3.2.8 Single Sign-On

General Concept

Single sign-on (SSO) is a user authentication process that permits a user to enter one name and password in order to access multiple applications. The process authenticates the user for all the applications they have been given rights to and eliminates further prompts when they switch applications during a particular session. That is, having entered a login and password once on a central SSO server a user will be automatically logged into other applications, like, issue tracker, source control system, code review system and so on.

Note: *Single sign-on authentication is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)*^[3]

Typically Single Sign-On solutions consist of several components - a SSO server and a number of SSO clients. A SSO server is a component that performs authentication, issues and validates tokens and so forth. SSO clients are intermediate components that can be integrated with various software platforms and applications in order to communicate with the SSO server via some authentication protocol. Most SSO solutions also provide Single Logout functionality - that is they allow users to log out from the application and from the SSO server simultaneously.



The authentication process will consist of the following steps:

1. A user tries to access a Collaborator server.
2. Collaborator recognizes that the user is not logged-in and redirects them to the SSO server.
3. The SSO server authenticates the user, adds some security assertion parameters and redirects back to the Collaborator server.
4. Collaborator detects the security assertion parameters and logs the user in.
5. If a user with the specified credentials is not found, Collaborator creates a new user.

The logout process will consist of the following steps:

1. A user tries to logout from the Collaborator server.
2. Collaborator sends logout request to the SSO server.

3. The SSO server logs the user out and sends the response back to the Collaborator server.
4. Collaborator logs the user out.

Single Sign-On Implementations in Collaborator

Currently, Collaborator supports single sign-on authentication for [web client](#)^[286]. Single sign-on authentication for [desktop clients](#)^[423] (GUI Client, Command-Line Client, IDE plug-ins) is not supported.

There are several ways to enable single sign-on authentication:

- **via SAML protocol:** If your SSO vendor supports Security Assertion Markup Language (SAML) standard, then you can configure the SSO server and the Collaborator server to use SAML protocol for authentication. Read [Configuring SSO via SAML](#)^[126] for detailed instructions.
- **via Crowd OpenID protocol:** If you use Atlassian Crowd server, then you can configure it and the Collaborator server to use OpenID protocol for authentication. Read [Configuring SSO via Crowd OpenID](#)^[134] for detailed instructions.
- **via Java Servlet:** If your SSO vendor provides SSO Client application in the form of Java servlets, then you can install it to Collaborator server and configure it to redirect Collaborator users to SSO server for authentication. Read [Configuring SSO via Java Servlet](#)^[138] for detailed instructions.

3.2.8.1 Configuring SSO via SAML

This topic describes how to establish single sign-on between an SSO server and Collaborator using Security Assertion Markup Language (SAML) protocol. To learn general principles of how single sign-on operates, see [Single Sign-On](#)^[124].

In SAML terms, SSO server will act as Identity Provider (IdP) and Collaborator will act as Service Provider.

Below we describe how to establish single sign-on between Collaborator and [OneLogin](#) SSO server. Integration with Single Sign-On servers of other vendors is performed in a similar manner.

[Enable HTTPS Connections](#)^[127]

[Install and Configuring SSO Server](#)^[127]

[Configure Collaborator Server](#)^[127]

[Troubleshooting](#)^[133]

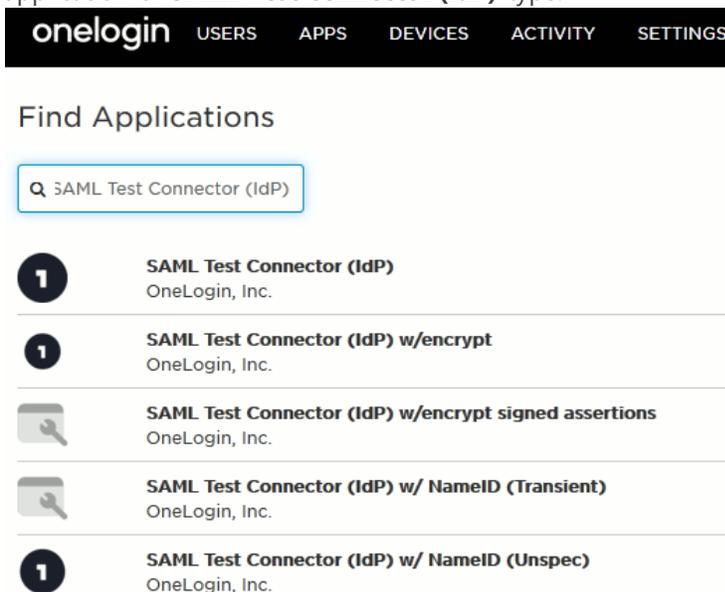
[Known Issues With OneLogin Server](#)^[133]

(Optional) Enable HTTPS Connections

Single sign-on servers mostly use HTTPS connections, thus you will likely need to enable it for Collaborator server as well. For instructions, please see, [Configuring HTTPS](#)^[17]. Do not forget to restart the Collaborator server to apply changes.

Install and Configure SSO Server

1. Install your preferred SSO server. In this instruction we will use [OneLogin](#) SSO server.
2. Log in to your SSO server as Account owner or Super user.
3. Add new application integration: Select **Apps | Add Apps** from the main menu and search for application of **SAML Test Connector (IdP)** type.



4. Specify application display name and optionally its icons and click **Save**.
5. Switch to the **Configuration** tab and specify the following data:

Audience The URL of the entity that is expected to receive the SAML message. In our case, this will be the URL of your Collaborator server. For instance: `https://yourcollabserver.com`

Important. Your Collaborator server must be accessible to SSO server. Configure a firewall or enable tunneled connections to do so.

ACS (Consumer) URL The URL of Assertion Consumer Service (ACS) where the SAML response will be sent to.
 Collaborator servers have this service at the following endpoint:
`https://yourcollabserver.com/services/saml/acs`

ACS (Consumer) URL Validator The regular expression to validate ACS URL.
 For instance: `^https://\./yourcollabserver\.\com/services\saml/acs/$`

Single Logout URL The URL of endpoint where the logout request will be sent to.
 Collaborator servers have the following logout endpoint: `https://yourcollabserver.com/services/saml/logout`

- Switch to the **Parameters** tab and append two assertion parameters with names: **FirstName** and **LastName**. For both parameters enable the *Include in SAML assertion* option. These parameters will contain the users first and last name, respectively. Optionally, modify the *NamID* parameter to pass username rather than e-mail address as primary user identifier. Also you can use the *NamID* parameter or add one more parameter to store LDAP user name for synchronizing group membership via LDAP or Active Directory. See "[Synching User Group Membership with LDAP/Active Directory](#)"^{13†} below.

Credentials are

Configured by admin Configured by admins and shared by all users

SAML Test Connector (IdP) Field	Value	Add parameter
FirstName	First Name	custom parameter
LastName	Last Name	custom parameter
NamID (fka Email)	Username	

Important: Please ensure, that parameters are named exactly as **FirstName** and **LastName**, since Collaborator would expect these parameter names in the assertion response.

- Click **Save** to confirm application configuration changes.

8. Assign users to the created Collaborator SAML Connector application: Select **Users | All Users** from the main menu, click the desired user, switch to the **Applications** tab and click the plus sign to assign an app to the user.

← John Smith MORE ACTIONS ▼ SAVE USER

User Info Authentication **Applications** Activity

Roles	Applications
Admin	<div style="border: 1px solid #ccc; padding: 5px;"> <p style="margin: 0;">Applications +</p> <p style="margin: 0;"> ▶ Collaborator SAML Connector (IdP) jsmith Admin-configured </p> </div>
Default	
simple_user	

Important:

- 1) Ensure that you have matching user accounts in Collaborator server and in OneLogin (the OneLogin username must be identical to the Collaborator username).
 - 2) Ensure that you have created at least one OneLogin user account matching the account of Collaborator administrator. Logging in with this account via SSO will log you into Collaborator server as its administrator.
9. Select **Apps | Company Apps** from the main menu, click Collaborator SAML Connector application and switch to the **SSO** tab.

Info Configuration Parameters Rules **SSO** Access Users

Enable SAML2.0

Sign on method
SAML2.0

X.509 Certificate

[Change](#) | [View Details](#)

SAML Signature Algorithm

Issuer URL

SAML 2.0 Endpoint (HTTP)

SLO Endpoint (HTTP)

This tab holds SAML metadata that you must provide to your Collaborator server to complete the integration.

Configure Collaborator Server

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Single Sign-On**
3. In the **New SSO Configuration** section select **SAML SSO** configuration type and click **Create**. This will display the configuration settings.

Service Provider:
The URL of service provider

SSO login endpoint URL:
The URL where to redirect users for single sign-on

SSO logout endpoint URL:
The URL where to redirect users for single logout

X.509 certificate:
Public certificate to establish trust between SSO server and Collaborator server

Enable AD/LDAP group sync:
Do you want to retrieve user membership in groups from the LDAP/Active Directory?

LDAP NameIDPolicy format:
The format of LDAP NameIDPolicy for Auth requests

Username parameter:
The LDAP response parameter that contains AD/LDAP username

MAKE ACTIVE **SAVE** **REVERT**

4. Specify the setting values:

Service Provider

The URL of the entity that is expected to receive the SAML message. In our case, this will be the URL of your Collaborator server. For instance: `https://yourcollabserver.com`

Important. Your Collaborator server must be accessible to SSO server. Configure a firewall or enable tunneled connections to do so.

SSO login endpoint URL

The URL where to redirect users for single sign-on procedure, if a session is not already established.

This should be the value from the SAML 2.0 Endpoint (HTTP) setting of Collaborator SAML Connector application on OneLogin server.

SSO logout endpoint URL

The URL where to redirect users for single logout procedure.

This should be the value from the SLO Endpoint (HTTP) setting of Collaborator SAML Connector application on OneLogin server.

X.509 Certificate	<p>The public certificate that establishes trust between SSO server and Collaborator server.</p> <p>This should be the value from the X.509 Certificate setting of Collaborator SAML Connector application on OneLogin server.</p> <p>To copy the X.509 certificate, click View Details and then click the Copy to Clipboard icon.</p>
SAML NameIDPolicy Format	<p>Specifies the format of the NameIDPolicy parameter in the authentication requests.</p>
Enable AD/LDAP lookup	<p>Specifies whether Collaborator should retrieve user membership in groups from the LDAP/Active Directory. See "Synching User Group Membership with LDAP/Active Directory"¹³¹ below.</p>
Username parameter	<p>Defines the name of SAML response parameter that contains LDAP username. See "Synching User Group Membership with LDAP/Active Directory"¹³¹ below.</p> <p>If the parameter name is not specified, or the parameter returns empty value the synchronization is not performed.</p>

- After you specified the values, click **Save**. This will create a SAML SSO configuration.
- If you have multiple configurations, press **Make Active** to mark current configuration as active.
- Scroll the **Admin > Single Sign-On** screen up to the **Single Sign-On (SSO) Status** section and change the **Enable Single Sign-On** setting to **Yes**.

Now the integration between Collaborator and single sign-on server is configured and running. Further attempts to log into Collaborator server will be processed by the sign-on server.

Synching User Group Membership with LDAP/Active Directory

While using single sign-on server to manage users, you may additionally configure user and group synchronization between Collaborator and the LDAP directory or Active Directory. In this case, Collaborator will perform the following action:

- When user logs in, sign-on server sends SAML response with some pre-configured parameters.
- Collaborator receives the response, extracts the parameter which holds LDAP username, and sends this username to LDAP directory or Active Directory.
- LDAP directory or Active Directory searches for groups this user belongs to and returns them to Collaborator.

4. Collaborator checks if the specified user and group(s) exist, creates them if needed, and adds the user to the group(s).
5. Collaborator server logs the user in.

Configuration for LDAP/AD Synchronization

In order to enable synchronization of group membership via LDAP or Active Directory, you need to perform the following actions:

1. Select/Create an SAML assertion parameter in user info section that will store user's username. This could be any existing parameter, like NameID, FirstName or LastName, or some dedicated parameter.
2. Modify Collaborator server's Root.xml (`<collab server install dir>/tomcat/conf/Catalina/localhost/ROOT.xml`) to use the Combined Realm element:

```
<Realm className="org.apache.catalina.realm.CombinedRealm" >
  <Realm allRolesMode="strictAuthOnly" className="org.apache.catalina.
realm.DataSourceRealm" dataSourceName="/jdbc/collabserver"
localDataSource="true" roleNameCol="user_admin"
userCredCol="user_password" userNameCol="user_login"
userRoleTable="user" userTable="user">
    <CredentialHandler className="org.apache.catalina.realm.
MessageDigestCredentialHandler" algorithm="md5" />
  </Realm>

  <Realm allRolesMode="strictAuthOnly" className="org.apache.catalina.
realm.JNDIRealm"
    connectionURL="ldap://ldap.example.com:389"
    userPattern="uid={0},dc=example,dc=com"
    roleBase="dc=example,dc=com"
    roleSearch="( &amp;(objectClass=groupOfUniqueNames)
(uniqueMember={0}))"
    connectionName="cn=read-only-admin,dc=example,dc=com"
    connectionPassword="password"
  />
</Realm>
```

The `roleSearch` parameter above defines the pattern used to identify user membership in a group. It uses standard LDAP query format syntax.

3. Verify that the `collaborator-authentication` parameter remains `true` as for regular authentication:

```
<Parameter description="Is the Collaborator database used for authentication?" name="collaborator-authentication" override="false" value="true"/>
```

4. In **Admin > Single Sigh-On** screen locate the desired SAML SSO configuration, set the **Enable LDAP lookup** setting to "Yes" and in **Username parameter** field specify the name of SAML assertion parameter that contains the LDAP username.

Technical details of LDAP/AD Synchronization

For mapping user membership in groups Collaborator uses the group's fully qualified domain name (FQDN) retrieved from the LDAP or AD. It checks if some of existing [user groups](#)^[212] has matching FQDN and adds the user to this group on success. Otherwise, it creates a new group and adds the user to the new group.

To name the new group Collaborator uses the first entry of group's fully qualified domain name (FQDN). For example, a group having the "ou= ccusers,dc=example,dc=com" FQDN will have the `ccusers` title. If some other group already has the same title, Collaborator will append the ordinal number to the group title: `ccusers1`, `ccusers2` and so on.

On every login Collaborator checks existing groups created via LDAP or Active Directory synchronization and actualizes user membership in those groups. Such algorithm allows to keep a consistency between Collaborator and LDAP or Active Directory.

Troubleshooting

If you experience troubles with single sign-on authentication and cannot login to your Collaborator server (wrong redirect URLs, cannot login as admin and so on), you can disable SAML single sign-on authentication via the `-Dcom.smartbear.server.sso.disable=true` [Java VM option](#)^[1093].

Known Issues With OneLogin Server

When users log out from OneLogin server, they still remain logged in Collaborator server. For some reason OneLogin server does not trigger Collaborator's SLO endpoint when user logs out directly from OneLogin server. However, when users log out from Collaborator server, they will be logged out both from Collaborator server and from OneLogin server.

3.2.8.2 Configuring SSO via Crowd OpenID

This topic describes how to establish single sign-on between an Atlassian Crowd OpenID server and Collaborator. To learn general principles of how single sign-on operates, see [Single Sign-On](#) ^[124].

[Enable HTTPS Connections](#) ^[134]

[Install and Configuring Crowd Server](#) ^[134]

[Configure Collaborator Server](#) ^[136]

[Troubleshooting](#) ^[137]

(Optional) Enable HTTPS Connections

Single sign-on servers mostly use HTTPS connections, so you will likely need to enable it for Collaborator server as well. For instructions, please see, [Configuring HTTPS](#) ^[117]. Do not forget to restart the Collaborator server to apply changes.

Install and Configure Crowd Server

1. Install Atlassian Crowd server.
2. Log in to your Crowd server as an administrator.
3. Add new application integration: Select **Applications** from the main menu and then click **Add Application**. This will display the application settings.

The screenshot shows the 'Add application' form in the Atlassian Crowd web interface. The navigation bar at the top includes 'Crowd', 'Applications', 'Users', 'Groups', 'Directories', and 'Audit log'. The 'Applications' menu is active. On the left, there is a search bar for applications and an 'Add application' button. The main form area is titled 'Add application' and contains the following fields:

- Application type***: A dropdown menu set to 'Generic Application'. Below it is a note: 'Are you connecting JIRA to Crowd, or perhaps Confluence or Bamboo?'
- Name***: A text input field containing 'Collaborator'. Below it is a note: 'The unique name that the application will use to authenticate against the Crowd framework as a client.'
- Description**: A text input field containing 'A SSO integration with Collaborator'. Below it is a note: 'A short description of the application. Often a URL is helpful.'
- Password***: A password input field with masked characters.
- Confirm password***: A confirm password input field with masked characters.

At the bottom of the form are two buttons: 'Next' (highlighted in blue) and 'Cancel'.

4. Specify the setting values:

Application type	The type of application you are adding to Crowd. For Collaborator integration select the Generic Application option.
Name	The name of the client application. Must be unique across the server.
Description	A short description of the application.
Password and Confirm password	A password application will use when it authenticates against the Crowd server. Retype the password to confirm it.

Click **Next**

- Specify the URL and the remote IP address of your Collaborator server. Specify port number, if you are not using a proxy.

You can click **Resolve IP Address**, which prompts Crowd to resolve the IP address for your application.

Important. Your Collaborator server must be accessible to SSO server and vice versa. Configure a firewall or enable tunneled connections to do so.

Add application - collaborator

URL *

The URL where this application resides, e.g. https://jira.atlassian.com

Remote IP address *

The IP address for the application, e.g. 127.0.0.1

Click **Next**

- Select one or more directories that this application can use for authentication and authorization:

Add application - collaborator

Please select the directories you are going to let this application use for authentication and authorisation.

- ACME Crowd server
Crowd Internal Directory

Click **Next**

- Specify the users who are authorized to access the application. Do one one of the following: either select **Allow all users to authenticate**, to grant application access to all users defined in the directory, or select one or more groups you wish to have access, and click **Add Group**.

Add application - collaborator

Either 'allow all' users access from a given directory to the 'collaborator' application, or choose the specific groups from each directory.

Directory – ACME Crowd server

Allow all users to authenticate
Let all users in this directory authenticate against the 'collaborator' application.

Directory groups

Click **Next**

- Confirm the details for your application and click **Add Application**.
- If you use proxy server, switch to the **Remote addresses** tab of application settings and add the proxy server's IP to the list.

Configure Collaborator Server

- Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
- In Collaborator, go to **Admin > Single Sigh-On**
- In the **New SSO Configuration** section select **Crowd SSO** configuration type and click **Create**. This will display the configuration settings.

OpenID endpoint URL:	<input type="text" value="https://crowd.acme.com:8095/openidserver/op"/>
	<small>The URL where to redirect users for single sign-on</small>
Crowd server URL:	<input type="text" value="https://crowd.acme.com:8095/crowd"/>
	<small>The URL of Crowd Server</small>
Crowd application name:	<input type="text" value="collaborator"/>
	<small>The name that Collaborator server will use to authenticate against the Crowd server as a client</small>
Crowd application password:	<input type="password" value="••••••••"/>
	<small>The password that Collaborator server will use to authenticate against the Crowd server as a client</small>
Enable Crowd group sync:	<input type="checkbox"/> <small>False</small>
	<small>Do you want to retrieve user membership in groups from the Crowd server?</small>
Automatic group creation filter:	<input type="text"/>
	<small>A Java-style regular expression used to filter Crowd groups before automatic group creation. Any group name that does not match the pattern will be excluded</small>

- Specify the setting values:

OpenID endpoint URL	<p>The URL where to redirect users for single sign-on procedure, if a session is not already established.</p> <p>The endpoint typically has the following format: <i>http(s)://yourcrowdserver:8095/openidserver/op</i></p>
Crowd server URL	<p>The URL of your Crowd server (including port number).</p> <p>The Crowd server URL typically has the following format: <i>http(s)://yourcrowdserver:8095/crowd</i></p>
Crowd application name and Crowd application password	<p>The name and password of Crowd application for Collaborator integration.</p> <p>This is the application that we have created on the Crowd server earlier ^[134].</p>
Enable Crowd group sync	<p>Specifies whether Collaborator should synchronize its native groups with group information from the Crowd server.</p> <p>Once enabled, on every logging-in, Collaborator will check user membership in groups on the Crowd server, create new groups (if needed), and automatically add this user to the corresponding groups on the Collaborator server. This operation could be time-consuming, if there are multiple groups on your Crowd server. If you have any problems, check the server log.</p>
Automatic group creation filter	<p>A Java-style regular expression used to filter Crowd groups before automatic group creation. Any group name that does not match the pattern will be excluded.</p>

- After you specified the values, click **Save**. This will create a Crowd OpenID configuration.
- If you have multiple configurations, press **Make Active** to mark current configuration as active.
- Scroll the **Admin > Single Sign-On** screen up to the **Single Sign-On (SSO) Status** section and change the **Enable Single Sign-On** setting to **Yes**.

Now the integration between Collaborator and Crowd OpenID server is configured and running. Further attempts to log into Collaborator server will be processed by the sign-on server.

Troubleshooting

If you experience troubles with Crowd OpenID single sign-on authentication, please check the following:

- Ensure that Crowd home directory is specified in `{CROWD_INSTALL}/crowd-webapp/WEB-INF/classes/crowd-init.properties` file. Check that this directory is writable.
- Check that CrowdID add-on is installed and configured. By default, it is installed and configured during the installation of Crowd server using the Crowd Setup Wizard. If you have skipped those steps, then install and configure it as described in [Atlassian Documentation](#).
- If all user attempts to log-in to Collaborator server are always redirected to `http(s)://yourcrowdserver:8095/openidserver/` (even when they are already logged-in on Crowd server), please verify that the **OpenID endpoint URL** ^[137] value is specified correctly. Namely, that the URL ends with `/openidserver/op`

If the problem persists, you can disable single sign-on authentication via the `-Dcom.smartbear.server.sso.disable=true` [Java VM option](#) ^[1093].

3.2.8.3 Configuring SSO via Java Servlet

This topic describes how to establish single sign-on between an SSO server and Collaborator using Java servlet for Tomcat. To learn general principles of how single sign-on operates, see [Single Sign-On](#) ^[124].

Below we describe how to establish single sign-on between Collaborator and [Aperio Central Authentication Service](#) (CAS). Integration with Single Sign-On servers of other vendors is performed in a similar manner.

[Enabling HTTPS Connections](#) ^[138]

[Installing SSO Server and Client Components](#) ^[139]

[Adding Filters to Collaborator's Tomcat Server](#) ^[139]

[Configuring Collaborator Server VM Options](#) ^[141]

[Configuring CAS Properties for Logout Requests](#) ^[142]

[Restarting the Collaborator Server](#) ^[142]

[Known Issues With CAS Server](#) ^[143]

Enabling HTTPS Connections

Most Single Sign-On servers use HTTPS connections, thus you will likely need to enable it for Collaborator server as well. For instructions, please see, [Configuring HTTPS](#) ^[117]. Do not forget to restart the Collaborator server to apply changes.

Installing SSO Server and Client Components

In Apereo Central Authentication Service, SSO server component is implemented as a Java servlet, and SSO clients are provided for different platforms and technologies (Java, .NET, PHP, Python and so on). Since Collaborator is a Java application, we will use Java CAS client.

Notes : To simplify the example, we will install both CAS server and CAS client on the same instance of Tomcat server.

Not all versions of CAS server and CAS client are compatible with each other. For example, CAS server 4.0 does not work with CAS client 3.3. In this integration, will use CAS server 3.5.2 and CAS client 3.1.12.

1. Download [CAS server archive](#) and unzip it to temporary folder.
2. Copy `modules\cas-server-webapp-3.5.2.war` file to `<collab server install dir>\tomcat\webapps` folder.
3. Download [CAS client archive](#) and unzip it to another temporary folder.
4. Copy all files from `cas-client-3.1.12\modules\` folder to `<collab server install dir>\tomcat\webapps\ROOT\WEB-INF\lib` folder.

Adding Filters to Collaborator's Tomcat Server

In this step we will add several filters to Tomcat server. These filters would detect unauthenticated users, redirect them to SSO server, validate users and perform single sign-out. To learn more about filter configuration, see "[The Essentials of Filters](#)" on Oracle's website.

Open `<collab server install dir>\tomcat\webapps\ROOT\WEB-INF\web.xml` file and append the following lines to it:

```
<filter>
  <filter-name>CAS Authentication Filter</filter-name>
  <filter-class>org.jasig.cas.client.authentication.
AuthenticationFilter</filter-class>
  <init-param>
    <param-name>casServerLoginUrl</param-name>
    <param-value>https://yourcollabserver:8443/cas-server-webapp-3.5.2/
login</param-value>
  </init-param>
  <init-param>
```

```
<param-name>serverName</param-name>
<param-value>https://yourcollabserver:8443</param-value>
</init-param>
<init-param>
<param-name>gateway</param-name>
<param-value>>false</param-value>
</init-param>

</filter>
<filter-mapping>
<filter-name>CAS Authentication Filter</filter-name>
<url-pattern>/ui/*</url-pattern>
<url-pattern>/go/*</url-pattern>
</filter-mapping>

<filter>
<filter-name>CAS Validation Filter</filter-name>
<filter-class>org.jasig.cas.client.validation.
Cas20ProxyReceivingTicketValidationFilter</filter-class>
<init-param>
<param-name>casServerUrlPrefix</param-name>
<param-value>https://yourcollabserver:8443/cas-server-webapp-3.5.2/
</param-value>
</init-param>
<init-param>
<param-name>serverName</param-name>
<param-value>https://yourcollabserver:8443</param-value>
</init-param>

</filter>
<filter-mapping>
<filter-name>CAS Validation Filter</filter-name>
```

```
<url-pattern>/*</url-pattern>
</filter-mapping>

<filter>
<filter-name>CAS HttpServletRequest Wrapper Filter</filter-name>
<filter-class>org.jasig.cas.client.util.
HttpServletRequestWrapperFilter</filter-class>
</filter>
<filter-mapping>
<filter-name>CAS HttpServletRequest Wrapper Filter</filter-name>
<url-pattern>/*</url-pattern>
</filter-mapping>

<filter>
<filter-name>CAS Single Sign Out Filter</filter-name>
<filter-class>org.jasig.cas.client.session.SingleSignOutFilter
</filter-class>
</filter>
<filter-mapping>
<filter-name>CAS Single Sign Out Filter</filter-name>
<url-pattern>/*</url-pattern>
</filter-mapping>
<listener>
<listener-class>org.jasig.cas.client.session.
SingleSignOutHttpSessionListener</listener-class>
</listener>
```

Remember to change "yourcollabserver" with the actual URL of your Collaborator server

Configuring Collaborator Server VM Options

In this step we need to change server's VM options to enable SSL connections between the Collaborator and CAS servers and to specify the logout redirect URL.

Open `<collab server install dir>/ccollab-server.vmoptions` file and add the following lines to it:

```
-Djavax.net.ssl.keyStore=<collab server install dir>/tomcat/conf/collab.ks
-Djavax.net.ssl.keyStorePassword=<the keystore password>
-Djavax.net.ssl.trustStore=<collab server install dir>/tomcat/conf/cacerts
-Djavax.net.ssl.trustStorePassword=<the truststore password>
-Dsmartbear.ccollab.sso.logout.redirect.url=https://yourcollabserver
:8443/cas-server-webapp-3.5.2/logout
```

The latter VM option specifies the URL to which users will be redirected when they press "Logout" link in the Collaborator's web-interface.

Alternatively, you can remove the "Logout" link in Collaborator's Web Client by setting the VM option as:

```
-Dsmartbear.ccollab.sso.logout.redirect.url=hide
```

In that case, users would manually perform logging out from the SSO server.

Restart the Collaborator server to apply changes in VM options.

Configuring CAS Properties for Logout Requests

In this step we will configure how CAS server should handle logout requests.

1) Open Collaborator [Web Client](#)^[286].

2) Open the `<collab server install dir>\tomcat\webapps\cas-server-webapp-3.5.2\WEB-INF\` folder and wait until a file with name `cas.properties` is created in this folder. (The `cas.properties` file is deployed from the `cas-server-webapp-3.5.2.war` web application archive, so it can take some time til it is created.)

3) Open `<collab server install dir>\tomcat\webapps\cas-server-webapp-3.5.2\WEB-INF\cas.properties` file and set the value of `cas.logout.followServiceRedirects` property to true:

```
# Specify whether CAS should redirect to the specified service
parameter on /logout requests
cas.logout.followServiceRedirects=true
```

Restarting the Collaborator Server

In order to apply all the changes we need to restart the Collaborator server.

Known Issues With CAS Server

- Currently, CAS server settings only allow to have coinciding login/password values. That is, the password must have the same value as the login.
- Because of [cookie handling issues](#), CAS server's Single Logout functionality may not work correctly with Collaborator web clients. Namely, logging out from Collaborator web client will not terminate a session on a CAS server. As a result, the subsequent attempts to open any of Collaborator web client's /ui pages will not be redirected to CAS server login page but will open the Collaborator's native login page instead. This issue does not affect /go pages of web client, however major part of Collaborator web client pages are /ui pages and are affected. To workaround the problem:

- 1) Open <collab server install dir>\tomcat\webapps\cas-server-webapp-3.5.2\WEB-INF\spring-configuration\ticketGrantingTicketCookieGenerator.xml file and set the value of p:cookieSecure property to false:

```
<bean id="ticketGrantingTicketCookieGenerator" class="org.jasig.cas.web.support.CookieRetrievingCookieGenerator"
p:cookieSecure="false"
p:cookieMaxAge="-1"
p:cookieName="CASTGC"
p:cookiePath="/cas" />
```

- 2) Logout from Collaborator Web Client and logout from CAS server.
- 3) Clear browser cookies.

Alternatively, you can disable the "Logout" link in Collaborator Web Client and perform logout from the CAS server. See [above](#)^[142] for instructions.

3.2.9 JMX Monitoring

You can monitor many aspects of the Collaborator server via JMX, Java's standard, built-in network monitoring system.

Setting up a basic JMX system

To enable JMX you must add Java properties to the server startup script. To do that, edit the file `ccollab-server.vmoptions` which is found inside the server installation directory.

Inside this file, add the following lines:

```
-Dcom.sun.management.jmxremote=true
```

```
-Dcom.sun.management.jmxremote.port=54321  
-Dcom.sun.management.jmxremote.authenticate=false  
-Dcom.sun.management.jmxremote.ssl=false
```

The first line enables JMX. The second line sets the TCP/IP port number for the JMX protocol, and of course you can use a value other than the example 54321. The last two lines disable JMX authentication and security.

Note: You must restart the Collaborator server before these settings take effect.

You can now use any JMX console software to access the Collaborator JMX variables. Sun's Java installation ships with a simple JMX console which can be found in [Java-Install-Dir]/bin/jconsole.exe. If you use Sun's console, select the "Remote" tab in the connection dialog and specify the host name, the port given in the configuration above. Leave "User Name" and "Password" blank.

Supported JMX data

There are various things you can monitor with JMX, and this manual cannot cover them all.

The data specific to Collaborator can be found under "MBeans," then under the root tree node "com.smartbear.collab". Under there you will find one child tree node for each installation of Collaborator, named by the web page it is installed under. The default is just a simple forward slash. Under that node is various data.

Of particular note is "ApplicationStateCache" and "ServletState". This contains basic information about logins, licensing, versioning, and product usage.

More complex JMX server configurations

A full description of how to configure JMX is outside the scope of this manual. It is completely standardized and documented on Sun's web site. A good resource to get you started is this:

<http://java.sun.com/j2se/1.5.0/docs/guide/management/agent.html>

3.2.10 Technical Specifications

This section describes the technical aspects of the Collaborator server. This information is not generally needed for server administration.

Server Technology

The web server is [Apache Tomcat v8.5.24](#). Collaborator itself is a collection of standard J2EE servlets, packaged in the standard WAR format that can be used inside any J2EE servlet container. Tomcat is the only servlet container specifically supported by SmartBear.

Tomcat is a sophisticated, scalable stand-alone web server with support for [HTTPS](#)^[117], [LDAP authentication](#)^[108], advanced HTTP protocol options, database pools, load-balancing, and more.

For more information about how Collaborator is configured under Tomcat, see [Tomcat Configuration Reference](#).

Starting and Stopping the Server

Windows

The server is a Windows Service. This means you can start, stop and restart the server just like any other service. The typical way is through the "Services" Control Panel. You can also use " `net start ccollab-server`" and " `net stop ccollab-server`" from the command-line.

Unix

The server is a shell script in the installation directory called `ccollab-server`. You can use the usual "start" and "stop" directives, which also means the script can be used directly in an `init.d` system.

If you encounter the error "Error 1: Incorrect function" when starting the server as a service on Windows, or the server fails to start with no error, possible remedies are:

- free up memory for the service by removing `-Xmx` or `-Xms` in the `ccollab-server.vmoptions` file.
- confirm a valid Java version/environment by running ' `java -version`' in you Java bin directory.

Data Storage

Collaborator stores almost all data in the [database](#)^[99] initially set up for it. It also uses file [content storage](#)^[98] – a local folder that keeps copies of uploaded files.

Recommended Hardware

For trials, you can use any hardware available. We have lots of customers who have done pilots on "servers" such as laptops and regular workstations. For small groups (30 users or less) doing small reviews, the server is not demanding on CPU, memory, disk access, or database access; if you run the server on a workstation, you will never know it is there.

For permanent installations, and to support hundreds or thousands of users, please review our hardware recommendations in the [System Requirements](#)^[57] section.

We run our own scalability tests using similar hardware. Our standard "smoke test" is 500 caffeinated users, most hitting [Review Summary](#)^[316] and [Side-by-Side](#)^[351] pages, a few in [administrative](#)^[169] and [reporting](#)^[407] pages. This represents far more activity than 500 real users.

Performance Tuning

General tips for making the server run as fast as possible:

- Use the latest version of the server and client.
We are constantly improving speed bottlenecks as they are reported. Upgrade to the latest version, or scan the [version history](#)^[876] to see if any speed improvements were made.
- Increase the "[chat refresh interval](#)^[173]" setting. This will make the chat pane update more slowly but can reduce stress on the server by many times. The default value is 5 seconds, but 15, 30, or even 60 seconds can work and reduce server load.
- Make sure nothing else is running on the Collaborator Server.
Often another server or process running on the same machine as our server will take up CPU cycles or slam the hard drive. For small installations it is quite common (and appropriate) for Collaborator to share a server, but for larger installations or when you are trying to squeeze out more performance you should dedicate a server.
- Increase the number of allowed database connections (instructions [here](#)^[165]).
Even if you are not getting errors on the web page about running out of connections, the web server threads might still be waiting for database connections to become available. (Error messages do not appear until those waits start timing out.)
- Increase the speed of the connection between the database server and the Collaborator Server.
Collaborator makes many small database queries, so decreasing network latency should improve performance. We recommend that Collaborator and the database server be connected via gigabit ethernet.
- Increase the number of server threads (instructions [here](#)^[165]).
Just as with database connections, more server threads means less waiting for browser connections on a busy server.

- Increase the max number of simultaneous connections in your browser. Both Internet Explorer and Firefox default to just two simultaneous connections to a server. You can increase this to 4 or more. This will not help if you have a very slow connection (for example, a modem), because slow connections are probably already maxed out.
- Make sure caching is enabled in your browser. Sometimes a browser's static cache is disabled; make sure it is enabled (at least for connections to our server). We have lots of styles, Javascript, and images that normally are cached.
- Tune the memory settings for Collaborator Server (instructions [here](#)^[1092]). More memory will often improve performance, but large documents in particular require a great deal of it, and often also require to change your Garbage Collector settings. If your users perform document reviews frequently, visit this section.

Monitoring

You can monitor our application like any other. Like many enterprise-ready Java applications, you can monitor [using JMX](#)^[143].

3.2.11 High Availability Best Practices

The Collaborator server is generally very stable and resilient. In most environments it is appropriate to simply try configuration changes or upgrades in-place ([backup](#)^[96] first, of course).

However if the server is in constant use by a large number of users, or if Collaborator is vital for your business processes, it may be a good idea to be more cautious. To ensure that a change will not cause a problem on your production Collaborator server, it is best to try it first on a test server.

Creating a Test Server

A test server should mirror your production server as closely as possible so that the results of the change are reproducible. Follow these steps to create a test server:

- 1) Provision a machine - this should be physically different hardware than the machine that is running your production Collaborator server, and ideally it should have the same specifications. It does not have to be a perfect match, but the closer you get it to the production server the more confident you will be when testing the change.
 - a) Hardware - this is not that important to get exactly identical unless you are concerned about performance issues.
 - b) Operating System - this is important. Make sure you install the same operating system version, especially if you are using Windows.

- c) Java Virtual Machine - this is vitally important. Make sure that you install exactly the same version of Java.
- d) Network Configuration - this is usually not that important unless your change involves communicating with an external system like [LDAP](#)^[106], a database service running on a different machine, or configuring [https](#)^[117].
- e) Database - this is very important, especially when testing upgrades to new versions of Collaborator.

Warning: The test server *must* have its own database. Do not run the test server with your production database!

2) Install the Collaborator server

- a) [Download the installer](#) for *exactly* the same version as your production server.
- b) Run the installer. You can click "next" through all the screens and accept the default settings, because those will be overwritten anyway in [step 4](#)^[148].
- c) When you click "Finish" in the installer it will open a browser to a page that says "Initialize database". DO NOT press the button, instead close the browser.
- d) Shut down the Collaborator server.

3) Copy your content-cache - this directory stores the content of the files being reviewed and can become very large. The directory is configured in the `installation-directory/tomcat/conf/Catalina/localhost/ROOT.xml` file and defaults to `installation-directory/tomcat/collaborator-content-cache`. Copy the entire directory to the test server in the same location.

- a) You can skip this step and your content-cache will simply be empty. Everything will work except when you look at the content of files in old reviews you will see a message " *This content has been archived by the Administrator*".
- b) Another option is to use a network share to your production server's content-cache, mounted to the test server's file system. While not ideal this is fairly safe because Collaborator only ever writes to the content-cache, never deletes.

4) Copy your configuration

- a) Copy the following files from your production server to your test server:

```
installation-directory/ccollab-server.vmoptions
installation-directory/tomcat/conf/collab.ks (may not exist)
installation-directory/tomcat/conf/Catalina/localhost/ROOT.xml
```

- b) Edit the "*installation-directory*/tomcat/conf/Catalina/localhost/ROOT.xml" file using a text editor and change the database information (url, username, password) to point to the test database.
- 5) Copy your database data - migrate a copy of the data from your production database to your test database as described in [Backup/Migration](#)^[95].
 - 6) Start up Collaborator.
 - a) Immediately [disable email notifications](#)^[190] so that your users do not get double notifications from your production server and your test server.
 - b) Click around and make sure everything works. Note that licensing is not an issue - since you have migrated your database your license will work on the test server.

Testing a Change

Once you have set up your test server you can use it to test any change you are considering to Collaborator, especially upgrades to new versions or global configuration changes.

3.2.12 Variable Substitution

In a few areas of server configuration ([Notification templates](#)^[262], [Collaborator triggers](#)^[190], [Perforce triggers](#)^[701]) you are allowed to use variable substitution to insert useful live data into a text-based template.

This section details those variables and how they work.

Syntax

Variable substitution is indicated with a dollar sign followed by curly braces surrounding the variable name. For example, to access the `review.creator.name` variable you would use this:

```
${review.creator.name}
```

When embedding in other text, variables are inserted into the text wherever they should be replaced. An example that is commonly used in the [changelist-update Perforce trigger](#)^[701] is:

```
ID ${review.id}: "${review.title}" by ${review.participants.rolename}
```

Context

Not all of the substitution variables are applicable in all contexts. In general, [notification templates](#) ^[262] use `#{review.*}`, `#{role.*}`, `#{actor.*}` for the sender and `#{user.*}` for the recipient. The [Review Created trigger](#) ^[197] uses `#{review.*}` and `#{user.*}` is the review creator. The [Review Phase Changed trigger](#) ^[197] uses `#{review.*}` and `#{user.*}` (not `#{actor.*}`). The [Added File trigger](#) ^[197] uses `#{review.*}`, `#{changelist.*}` and `#{files.paths}`. The [Notifications Sent trigger](#) ^[197] uses `#{review.*}` and `#{user.*}`. The [Defect Activity trigger](#) ^[197] uses `#{actor.*}` and `#{defect.*}`. The [User Created trigger](#) ^[197] uses `#{user.*}`. And the [Role Changed trigger](#) ^[197] uses `#{review.*}`, `#{user.*}` and `#{role.*}`, where `#{role.*}` stands for the new current role.

Also, pay your attention that not all of the variables are available at the moment the trigger fires. In this case they will return "Not available" instead of their value.

Reference

The following table lists all the variable substitutions.

Variable	Description
<code>#{review.id}</code>	The numeric ID of a review. Example: 4235
<code>#{review.title}</code>	The title field of a review. This variable is not available for the Review Created trigger.
<code>#{review.workflow}</code>	The name of the workflow (template) this review is currently in. If you change the template name in workflow configuration ^[230] this text changes too, so be careful of scripts which depend on this value.
<code>#{review.phase}</code>	The name of the phase this review is currently in, for example, "Inspection" or "Completed" or "Canceled".
<code>#{review.phase.previous}</code>	The name of the previous phase of the review. Valid only in the context of a phase change.
<code>#{review.creator.*}</code>	User information corresponding to the creator of the review. The asterisk should be replaced by a user-specific variable (described elsewhere). So for example, the user's full name would be <code>#{review.creator.name}</code> .
<code>#{review.author.*}</code>	User information corresponding to the primary author assigned in the review. The asterisk should be replaced by a user-specific variable (described elsewhere). So for example, the user's full name would be <code>#{review.author.name}</code> .
<code>#{review.custom.*}</code>	The value of one of the review custom fields ^[235] . The final variable component should be the full title of the custom field, including whitespace and so forth.

	<p>If this review does not have this field because the user has not entered it yet, if there is a default value it will be returned. If this review does not have this field because the workflow does not include the field, you will get an error message.</p> <p>If you supply the name of a custom field that does not exist, you will get an error message to that effect including the list of valid custom field names. You can use this fact to create an error on purpose to get the list of valid custom fields.</p>
<code>\${review.datecreated}</code>	The date when the review was created.
<code>\${review.deadline}</code>	The date when the review should be completed.
<code>\${review.group.title}</code>	Title of the group associated with the review.
<code>\${review.group.guid}</code>	GUID of the group associated with the review.
<code>\${review.participants.rolename}</code> <code>\${review.participants.rolelogin}</code>	List of role/user pairs of the people assigned to the review. In the <code>rolename</code> case the user's full names are used; in <code>rolelogin</code> the user's system login names are used. Roles are named by the display name as configured ^[253] ; be careful when writing scripts that depend on this text, and remember that different workflows can define different text for the role name.
<code>\${review.changesummary}</code>	A multi-line summary of the changes in the review, lines (+add, *mod, -del) for each file.
<code>\${review.shortchangesummary}</code>	A short summary of the changes in the review, total lines (+add, *mod, -del) for all the files in the review.
<code>\${review.defectlog}</code>	The log of all defects in a review.
<code>\${user.id}</code>	The unique ID of the user in our own database.
<code>\${user.login}</code>	The system login for the user. If LDAP authentication ^[100] is being used, this is the user's LDAP login. The login is unique for every user in the system.
<code>\${user.name}</code>	The user's full name, as they configured it themselves. This is not guaranteed to be unique in the system.
<code>\${user.email}</code>	The user's email address, or blank if it is not configured.
<code>\${user.phone}</code>	The user's phone number field, exactly as they configured it themselves.

<code>\${files.paths}</code>	A set of file paths, in no particular order, separated by the pipe symbol. This is typically a set of paths in the SCM server style, not local file paths. This variable is not available for the Review Created trigger.
<code>\${changelist.paths}</code>	Same as <code>\${files.paths}</code> . This variable is not available for the Review Created trigger.
<code>\${changelist.scmid}</code>	The ID of this changelist according to the SCM system. For example, Perforce changelist ID or Subversion revision number. This variable is not available for the Review Phase Changed trigger.
<code>\${changelist.author}</code>	The author of the changelist according to the SCM system. Note that although this username <i>might</i> correspond to a user in Collaborator, this is not required. Further note that because this is a simple text field and not a user object, you cannot continue with other sub-fields like email or phone number.
<code>\${changelist.comment}</code>	The comment given in the SCM system for this changelist.
<code>\${defect.id}</code>	The unique ID of this defect in our own database.
<code>\${defect.creator.*}</code>	User information corresponding to the creator of the defect. The asterisk should be replaced by a user-specific variable (described elsewhere). So for example, the user's full name would be <code>\${defect.creator.name}</code> .
<code>\${defect.file}</code>	The full path to the file this defect is attached to, or a blank string if the defect was review-wide.
<code>\${defect.line}</code>	The line number in the file where this defect is attached, or 0 if this defect is attached to the overall file, the overall review, or something else that's not relevant to a specific line. Note that this line number refers to the file at the time of review; in the future the file can change and line numbers can change with it.
<code>\${defect.text}</code>	The text entered in the comment field for this defect. This can be long and multi-lined.
<code>\${defect.isfixed}</code>	Boolean text "true" if the defect is currently marked fixed, "false" if the defect is currently open.
<code>\${defect.isexternal}</code>	Boolean text "true" if the defect is currently marked external, "false" if the defect is currently marked as internal.
<code>\${defect.externalname}</code>	The external name specified when the defect was marked external.

<code>\${defect. custom.*}</code>	<p>The value of one of the defect custom fields^[235].</p> <p>The final variable component should be the full title of the custom field, including whitespace and so forth.</p> <p>If this defect does not have this field because the workflow does not include the field, you will get an error message.</p> <p>If you supply the name of a custom field that does not exist, you will get an error message to that effect including the list of valid custom field names. You can use this fact to create an error on purpose to get the list of valid custom fields.</p>
<code>\${role.title}</code>	The title of the role assigned to the user in the review
<code>\${role. description}</code>	The description of the role assigned to the user in the review
<code>\${actor.*}</code>	The user responsible for triggering this action. The asterisk should be replaced by a user-specific variable (described elsewhere).

3.2.13 Archiving Reviews

Collaborator can pack reviews to an external Zip archive.

You can use this feature to keep historical records of the reviews (for instance, because of regulatory requirements), or to export review information to a non-proprietary format.

Note: This feature is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)^[3].

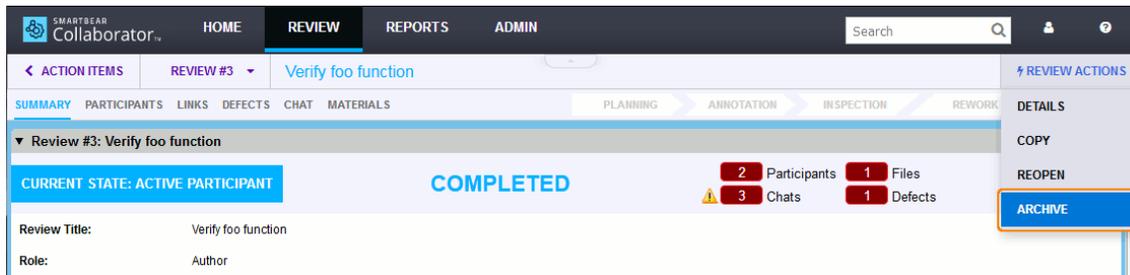
Creating Archives

There are two ways to archive reviews: from the Web Client and from the command-line.

To archive a review from the command-line call the `collab admin archive` command. See command description for its syntax and examples.

To archive a review from within the Web UI:

1. Open the desired review in the [Review Summary screen](#)^[316]. To find the reviews, you may use Collaborator's [search](#)^[398] and [reporting](#)^[407] systems.
2. Select **Review Actions > Archive** in review header:



This will invoke a standard Save As dialog where you can specify the location for the archive.

Creating Archives Automatically

You may use Collaborator server triggers to archive reviews automatically. The general idea is to install the Command-Line Client on a server machine and call the `ccollab admin archive` command via the server's [phase change trigger](#)¹⁹⁶. Below are the detailed steps of how to achieve this:

1. Install the [Collaborator client](#)⁴²⁵ on the same machine where Collaborator server is installed.
2. Specify the [connection parameters](#)⁴³² for the client.
3. Create a directory to store the archived reviews. In this example that will be `c:\archived-reviews` on Windows platforms and `/archived-reviews` on Unix platforms.
4. Login to the Collaborator web interface as an administrator.
5. Go to the [Admin->Triggers](#)¹⁹⁶ page
6. Find the "Review Phase Changed" trigger, and configure it as follows:

Windows platforms	Unix platforms
<p>Executable: <code>c:\program files\collaborator client\ccollab.exe</code></p> <p>Parameters: <code>admin archive \${review.id} --zip-path c:\archived-reviews</code></p>	<p>Executable: <code>/usr/local/ccollab_client/ccollab</code></p> <p>Parameters: <code>admin archive \${review.id} --zip-path /archived-reviews</code></p>

You may need to change paths to the Collaborator command line client and to the archives folder as necessary.

Note: In the example above the trigger does not check if the phase has transitioned to completed, cancelled or rejected. Since the `ccollab admin archive` command ignores in-progress reviews (by default) you can simply call it on every phase changed event. If your team is using the tool heavily, then you should create a shell script or batch file, and check the review phase before calling the `ccollab admin archive` command. This will result in improved performance, but is not really necessary for small or medium sized installations.

The Archive Contents

For each review a separate archive is created. Generated files have the names in the format "review-*ID*-archive.zip", where *ID* stands for the identifier of the review.

Each archive contains the following information about the review:

- The `ReviewDetails.pdf` file contains a PDF version of the [Review Detail Report](#)^[407].
- The `material_conversations` subfolder contains all comments, defects and conversations that were made during the review. For each of the commented files a separate PDF version is created that holds the contents of the file and the comments and defects related to this file.
- Review materials.
 - If the archive was created from Web UI, it contains all revisions of the materials that were uploaded to the review. If a file was uploaded multiple times (as it typically happens during rework), the archive will contain a copy of each file revision.
 - If the archive was created with the `ccollab admin archive` command, the amount of review materials is specified by the `--zip-option` parameter.

The naming structure of subfolders that store review materials, depends on how the materials were uploaded. For changes uploaded via version control system, the folder name will contain the name of SCM, the name of the repository and (if available) the ID of the changeset ("git-git.example.com_foo_repo.git-85d2f5ccb7f27e1628c09e4d1373f"). For uploads of arbitrary files, the folder names will contain the "upload-file-" portion followed by the date and time ("upload-file-2015-08-18-02-58-59").

Remarks:

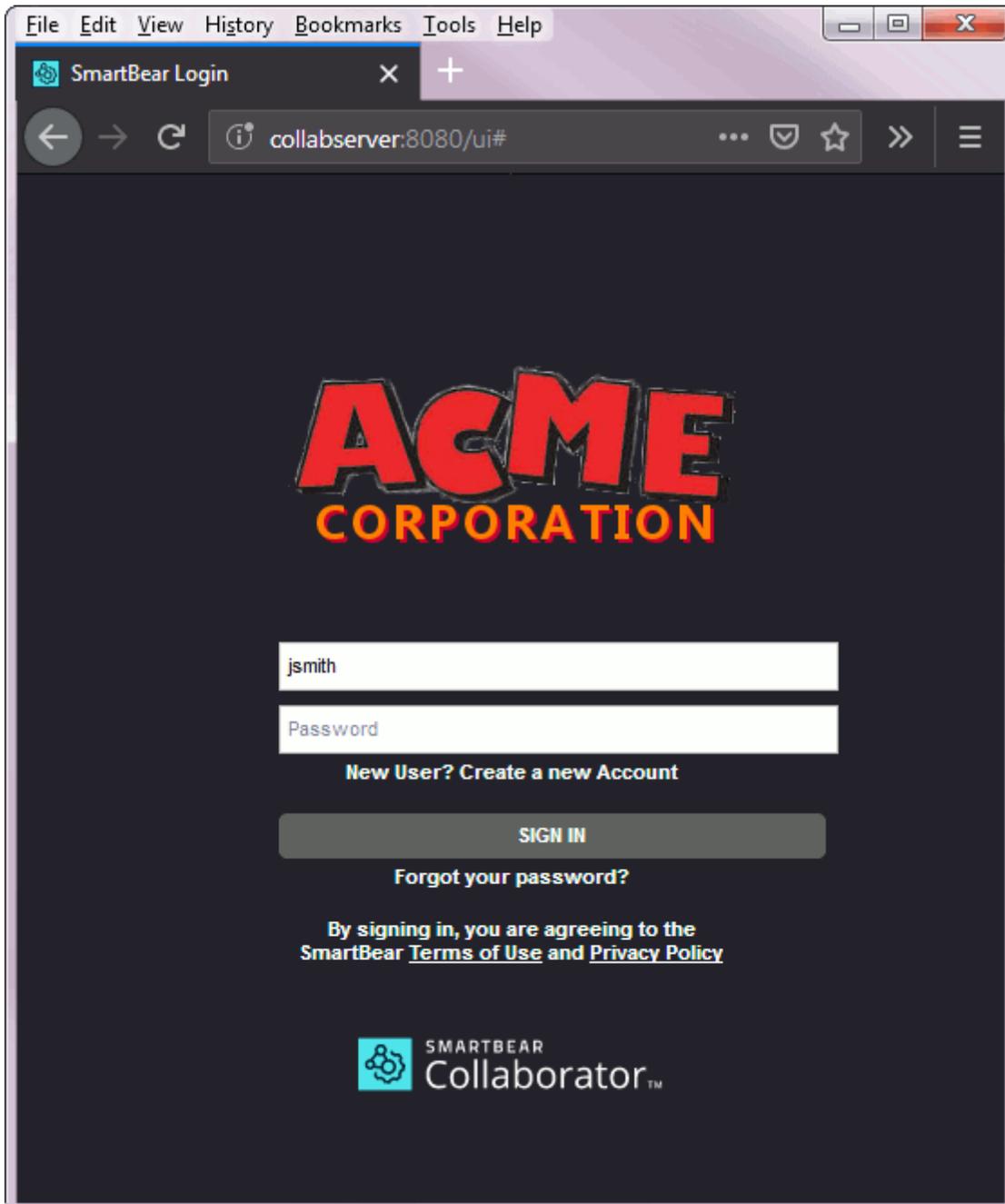
- The "[Allow Archive to zip](#)"^[177] setting controls who can use this feature. The possible values are: [administrators](#)^[210], [group administrators](#)^[217], or all users (considering the [access permissions](#)^[176] of the chosen review).
- By default, only the reviews in the [Completed, Cancelled or Rejected phases](#)^[17] can be archived. Yet, the "[Allow Archive to Zip for Open Reviews](#)"^[177] setting may allow to archive reviews on any phase.

- The built-in PDF viewer of Windows 8, 8.1 and 10 do not support overlay layers in PDF files. Collaborator uses such layers to render [coordinate comments \(pushpins\)](#)^[382] in PDF versions of review materials for archived reviews. Because of this, pushpins will not be displayed if the PDF file from the archive is opened in the built-in PDF viewer of Windows 8, 8.1 and 10. As a workaround, please install the Adobe Acrobat Reader or any other full-featured PDF viewer.

3.2.14 Branding Your Server

Administrators of Collaborator Enterprise servers can add custom company logotypes to server's Web interface. Namely, they can enable logos on [Login](#)^[289], [Home](#)^[287] and [Review Summary](#)^[316] screens.

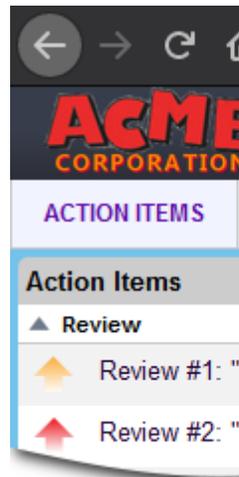
Note: Ability to display your company logos on Login and Home screens is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)^[3].



Login screen with customized logo

Preparing Company Logos

Collaborator uses two image files for displaying your company logo: one for the Login screen and another for Home and Review Summary screens. You may have a separate image for each screen, or use the same image file for both screens.



The company logo images must be in PNG format. Transparent background is recommended. Image resolution is not limited. Large images will be resized to fit into 640x480 area on Login screen and into 250x50 area on Home and Review Summary screens.

Technical Details

Custom logo files are stored in the `logos` sub-folder of server's `content storage` (`installation-directory/tomcat/collaborator-content-cache/logos`). Thus, they will be retained when `backing up/migrating` your server together with content storage.

Login Screen Branding

To display custom logo on Login screen

1. Open `System` category of administrator settings,
2. Switch to the Display tab,
3. Enable the `Company Logo on Login` setting,
4. Click the placeholder/current logo and upload image with your company logo.
5. Click **Save** button to apply the changes.

Home Screen Branding

To display custom logo on Home and Review Summary screens:

1. Open `System` category of administrator settings,
2. Switch to the Display tab,
3. Enable the `Company Logo on Home` setting,
4. Click the placeholder/current logo and upload image with your company logo.
5. Click **Save** button to apply the changes.

3.2.15 Logging

Log Files

Collaborator server logs messages to several files.

Log File	Description
<code><installation-directory>/tomcat/logs/collab.log</code>	Captures application level logging and (if enabled ¹⁶⁰) license usage events, such as user login and logout. Configurable.
<code><installation-directory>/tomcat/logs/remoteSystem.log</code>	Captures actions of remote repository integrations. Configurable.
<code><installation-directory>/tomcat/logs/remoteSystemAPI.log</code>	Captures all outgoing API calls and usage statistics of API cache. Configurable.
<code><installation-directory>/output.log</code>	Captures the standard out stream from the application libraries. Non-configurable.
<code><installation-directory>/error.log</code>	Captures the standard error stream from the application libraries. Non-configurable.

Note: Normally, Collaborator does not write to standard out or error, but some of the libraries that it uses do. Occasionally, output.log and error.log could be helpful for debugging issues in one of those libraries.

Configuring Logging Using Configuration Files

Collaborator uses a sophisticated logging system, log4j, to manage the logging. Because of the breadth of configuration options available in log4j, it is not possible to document everything here (the log4j documentation is available at <http://logging.apache.org/log4j/1.2/manual.html>). However, in this section, we will cover some common scenarios.

The configuration file for the `collab.log`, `remoteSystemAPI.log` and `remoteSystemAPI.log` files can be found at `<installation-directory>/tomcat/webapps/ROOT/WEB-INF/classes/log4j.properties`. The file is a plain text Java properties file and can be edited with any text editor. Changes will take effect when the server is restarted.

Note: Edits to the log4j.properties file will not be saved between updates to Collaborator. Upon editing this file, it is a good idea to save a backup of the file in a location outside the Collaborator installation tree.

Basic Debug Logging

The most common configuration change that system administrators will make is to turn on debug logging. This can be useful when working with SmartBear technical support to resolve issues (though this is not always required). To enable debug logging, find the first non-comment line in the file:

```
log4j.rootLogger=info, CodeCollaborator
```

This line configures the base level logging to "info" level and attaches an appender named "CodeCollaborator" that will be configured later in the file. To enable debug logging, simply replace "info" with "debug" and restart the server. Do not change the name of the appender as this will result in the log configuration not being available via [JMX](#)^[16]. Running a production system at debug logging level can cause performance issues, so it is not recommended unless specifically directed by SmartBear technical support.

Log Rolling

By default the collab.log file is rolled when it reaches 10Mb and saves 10 generations of files, for a total of 110Mb of disk space potentially consumed. Both of these values can be configured in the log configuration file. The following lines specify these values:

```
log4j.appender.CodeCollaborator.MaxFileSize=10MB  
log4j.appender.CodeCollaborator.MaxBackupIndex=10
```

System administrators may change these values as necessary to capture additional logging information or conserve disk space as necessary.

Enabling License Logging

Collaborator can log license events (users logging in and out) to help you understand your license consumption. By default this is disabled as it is normally not necessary. The [system status](#)^[20] page includes graphs which are helpful for understanding the total license consumption. However, drilling down to find what users are using the system when requires turning on license logging.

To enable license logging:

1. Open the <installation-directory>/tomcat/webapps/ROOT/WEB-INF/classes/log4j.properties file.

2. Locate the `log4j.logger.com.smartbear.ccollab.license` line and change the license logging level from "warn" to "debug":

```
log4j.logger.com.smartbear.ccollab.license=debug,  
CodeCollaboratorLicense
```

3. Restart the Collaborator server to apply changes.

The license log appender is also configured to roll like the `collab.log` and this configuration can be changed in a similar manner. However, it is important that you not change the appender name from "CodeCollaboratorLicense" as this will result in the log configuration not being available via [JMX](#)¹⁶¹.

Enabling Remote System Logging

To diagnose issues with repository hosting integrations, you may enable detailed logging of remote repository actions and/or logging of outgoing API calls and usage statistics of API cache. By default those are disabled as it is normally not necessary.

To enable detailed logging of remote repository actions:

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations**
3. Set the **Enable detailed logging** option to **Yes**.
4. Click **Save**.

To enable logging of outgoing API calls and usage statistics of API cache:

1. Open the `<installation-directory>/tomcat/webapps/ROOT/WEB-INF/classes/log4j.properties` file.
2. Locate the `log4j.logger.rsApiLog` line and change the license logging level from "warn" to "debug":

```
log4j.logger.rsApiLog = debug, RemoteSystemAPI
```

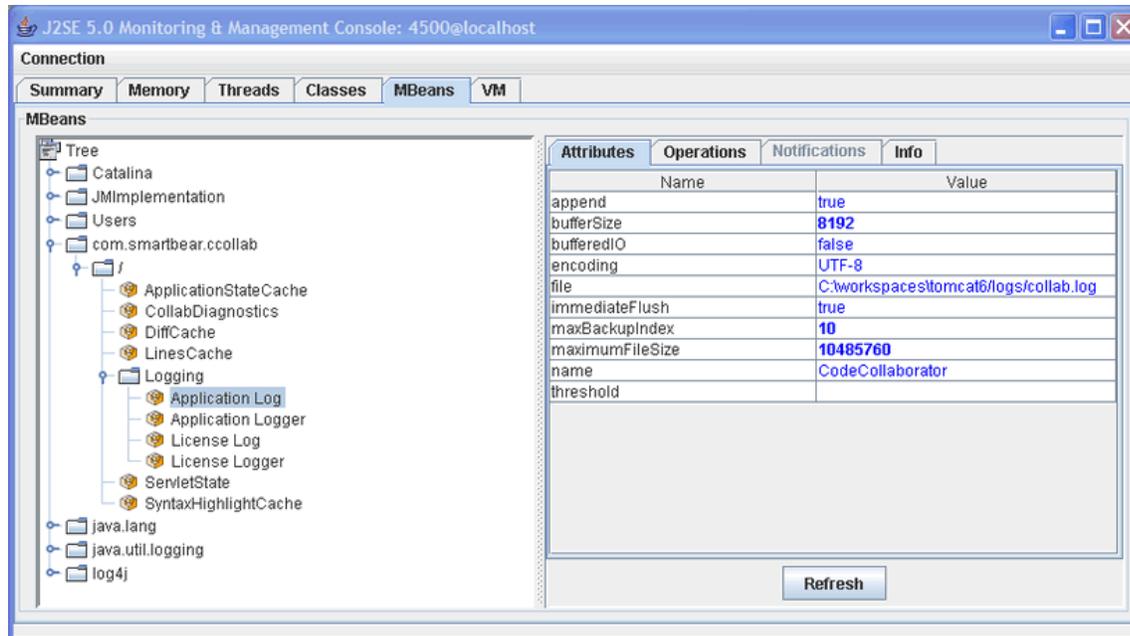
3. Restart the Collaborator server to apply changes.

Controlling Logging with JMX

If the Collaborator server has [JMX management enabled](#)¹⁴³, the logging level can be changed at runtime. All of the log configuration MBeans are available at `com.smartbear.ccollab:/Logging`. Changing the "priority" on "Application Logger" or "License Logger" will change the base level of logging for the application and the license log respectively.

The appenders are found under the names "Application Log" and "License Log". The max size, number of backups, and even the file names, can be changed in JMX. The changes will not take effect until the "activateOptions" operation is invoked. In jconsole operations are found in a separate tab.

Note: Changes to logging made via JMX are not persisted across server restarts.



Editing the Application Log Configuration in jconsole

3.2.16 Troubleshooting

When something goes wrong, refer to this section.

Known Issues

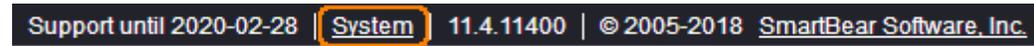
Check the [Known Issues Appendix](#)^[872] to see whether SmartBear already knows about this issue.

Version History

Check the [Version History](#) on the SmartBear website to see if this issue has been resolved in a later release.

Getting server information

To get debugging information about the server, go to the Collaborator web server and click the System link at the bottom of the screen:



Downloading server dumps for SmartBear technical support

Sometimes it will be useful for SmartBear technical support to get a "dump" of your server configuration and database data. You do this by filling out the form at the top of the System page.

Server Backup/Debugging Dump

Use this form to produce a Zip file containing all server data, useful for backup or debugging.

Data Format:	Normal <input type="button" value="v"/> <small>Selecting "obfuscated" will cause all file content, user names, file paths, and other potentially sensitive information to be replaced with gibberish or generic text (e.g. User1, User2). Normally you shouldn't use this mode, but it can be useful when creating data dumps that will be sent to SmartBear technical support if there is a security concern.</small>
Server Logs:	Include server logs <input type="button" value="v"/> <small>Warning: including all server logs increases how long it takes to generate the dump file and will increase the size of the dump file.</small>
File Contents:	No file content <input type="button" value="v"/> <small>Warning: including all file content can result in a multi-gigabyte dump file.</small>
Which Data:	Complete database dump <input type="button" value="v"/> <small>Getting just the system configuration is useful if you want to "start over" with the same basic configuration but with no reviews.</small>

DOWNLOAD DUMP FILE

Data Format

You can dump the entire database in a normal format, or set the "Data Format" field to "Obfuscated," which will dump the data after passing through a filter that converts potentially sensitive information into unhackable text. For example, users are renamed "user1," "user2," and changelist text is replaced by the MD5 of that text. If file contents are included in the dump, each line of file content is replaced with the MD5 of that line to enable us to reproduce exactly the right line numbers and diffs you are seeing. This can be used to send us data when you are worried there might be sensitive information.

If you are worried about whether we are really cleaning all the data, you can check out the dump file yourself. It is just a ZIP file containing XML with information, so it is easy to inspect. In fact, if you still see some data you would like to change or delete, you can just do that in the XML, re-zip the file, and send it to us.

Server Logs

You can choose to include all server logs or none at all.

File Contents

You can choose to include all file content or none at all.

Which Data

Here you can choose whether you would like to perform a complete database dump or just include the system configuration.

One Review Dumps

If just one review is broken, you can send us a dump of just the one review. To do that, **first go to the review in question**, then click the **System** link as before. Now you will see an additional field in the form for downloading review data (which includes all the file content as well).

Server Backup/Debugging Dump

Use this form to produce a Zip file containing all server data, useful for backup or debugging.

Data Format:	Normal <input type="button" value="v"/>	Selecting "obfuscated" will cause all file content, user names, file paths, and other potentially sensitive information to be replaced with gibberish or generic text (e.g. User1, User2). Normally you shouldn't use this mode, but it can be useful when creating data dumps that will be sent to SmartBear technical support if there is a security concern.
Server Logs:	Include server logs <input type="button" value="v"/>	Warning: including all server logs increases how long it takes to generate the dump file and will increase the size of the dump file.
File Contents:	Include all file content <input type="button" value="v"/>	Warning: including all file content can result in a multi-gigabyte dump file.
Which Data:	Complete database dump <input type="button" value="v"/>	Getting just the system configuration is useful if you want to "start over" with the same basic configuration but with no reviews.
Restrict to One Review:	Only data from Review ID 25936 <input type="button" value="v"/>	Dump just this review if you're creating a dump for debugging purposes.

One User Dumps

If reviews of some particular user are broken, you can send us a dump with reviews of this particular user. To do that, **first go to the [Admin | Users](#)** ²⁰⁶ **section**, then click the [Review data] link next to the desired user. Now you will see an additional field in the form for downloading review data for that particular user (which includes all their reviews and all the file content as well).

Server Backup/Debugging Dump

Use this form to produce a Zip file containing all server data, useful for backup or debugging.

Data Format:	Normal <input type="button" value="v"/>
	Selecting "obfuscated" will cause all file content, user names, file paths, and other potentially sensitive information to be replaced with gibberish or generic text (e.g. User1, User2). Normally you shouldn't use this mode, but it can be useful when creating data dumps that will be sent to SmartBear technical support if there is a security concern.
Server Logs:	Include server logs <input type="button" value="v"/>
	Warning: including all server logs increases how long it takes to generate the dump file and will increase the size of the dump file.
File Contents:	No file content <input type="button" value="v"/>
	Warning: including all file content can result in a multi-gigabyte dump file.
Which Data:	Complete database dump <input type="button" value="v"/>
	Getting just the system configuration is useful if you want to "start over" with the same basic configuration but with no reviews.
Restrict to One User:	All review data for user Clive Sindair <input type="button" value="v"/>
	Dump all reviews for this user if you're creating a dump for debugging purposes.

The server is running slowly

Check out our [performance tuning](#)^[146] suggestions and use [recommended hardware](#)^[146].

Large files consistently fail to upload or render

In order to review large artifacts, we recommend increasing the memory available to Collaborator server (instructions [here](#)^[1092]).

Email is not working

If email is not working, here are some things to try:

- Make sure the SMTP Host and SMTP Port [settings](#)^[189] are correct.
- Try sending a [test email](#)^[189]. Look in the [server logs](#)^[166] for error messages.
- If you just performed a [database migration/restore](#)^[96], email is automatically disabled. You need to enable it in the [settings](#)^[189].

Getting "Idle Timeout Waiting for Object" Error

This error is shown when the database connection pool runs out of connections to the database.

The fix is to increase the number of connections allowed in the pool. The server is capable of running with many more connections than the default; we keep the default fairly low so that in smaller installations we are not taking up too many database resources.

Fix this by going into the Tomcat servlet context XML file located here:

```
installation-directory/tomcat/conf/Catalina/localhost/ROOT.xml
```

Edit the property called `maxTotal` and increase the number of connections. Even doubling this number is normal. A rule of thumb is to have 3 times the database connections (and server threads) as the number of simultaneous users you have under the biggest load.

The Collaborator server must restart for this change to take effect. You do not need to do anything to your database server.

Warning: Modifying the `ROOT.xml` file will cause Tomcat to dynamically reload the Collaborator application, terminating any active sessions. Changes to `ROOT.xml` should be done in the context of stopping and restarting the Collaborator service (that is, in a production environment coordinating the restart with user activity), regardless of whether the service itself is actually stopped and restarted, or just reloaded by Tomcat.

Frequently this problem also implies that you should have more web server threads in addition to more database connections. To increase that, edit the `maxThreads` property from this XML file:

```
installation-directory/tomcat/conf/server.xml
```

Stop and restart the server to load new settings from the `server.xml` file.

"NoHttpResponseException: The server ... failed to respond" Error

This error can occur if a client connection times out after the default 20 seconds. A heavily loaded Collaborator server or limited resources can be the root of this problem, and investigating the server performance and network connectivity may be warranted. Regardless, the connection timeout can be increased by editing the millisecond value of the `connectionTimeout` variable in the `server.xml` file described above. For example, for a timeout of 60 seconds, use:

```
connectionTimeout="60000"
```

The Server Log

Collaborator is configured by default to perform a very limited amount of logging. The primary purpose of the logs is to record information about error conditions that could potentially arise. When working with SmartBear Technical Support to diagnose issues often it will be helpful to send the logs (or a portion thereof) for investigation.

The logs are located in the following directory:

```
installation-directory/tomcat/logs
```

Enable server-side debug logging

To enable verbose server-side logging, edit this file:

```
<installation-dir>/tomcat/webapps/ROOT/WEB-INF/classes/log4j.  
properties
```

At the bottom you will find a line called:

```
log4j.logger.com.smartbear=info
```

Change the "info" to "debug". You will have to restart the server for changes to take effect. Remember to revert these changes after reproducing the problem and copying off the log file because this creates a large number of logging messages and degrades server performance.

Change the settings so the server can be accessed remotely

To change the Windows Firewall settings:

Start > All Programs > Accessories > System Tools > Security Center

Click the "Manage security settings for: Windows Firewall" link. On the General tab, make sure the "do not allow exceptions" box is not checked. On the Exceptions tab, click "Add Port" For "Name", use "Collaborator", for "Port number", 8080. Leave TCP selected. If you want, you can click the "Change scope" button to get more options about who can and cannot connect to the port. Click "OK" in each dialog to save the settings and try connecting again.

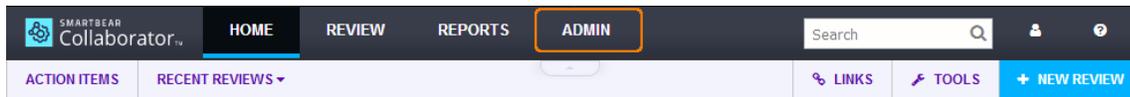
Contacting Technical Support

For technical support and general inquires, [contact us](#) .

3.3 Collaborator Settings

As a system administrator, you can configure Collaborator's settings to however you would like. This may be useful in better managing users and how they perform reviews.

These settings can be found and changed by simply clicking on "Admin" at the top menu bar. This button is available to users that are Collaborator administrators and to users with [advanced user permissions](#) . Administrators can modify all administrative settings, while users with advanced permissions could modify a limited number of settings depending on what permissions they have.



The administrative settings are grouped into a number of categories:

- The [System](#)^[163] category holds system-wide settings that control Collaborator look and feel, abilities and behaviour.
- The [Email](#)^[189] category holds SMTP server settings and other settings related to e-mail notifications of review activity.
- The [Version Control](#)^[194] category allows to integrate Collaborator with your version control system.
- The [Triggers](#)^[196] category configures Collaborator to run an external script or application when certain events occur.
- The [Licensing](#)^[198] category manages Collaborator licenses.
- The [System Status](#)^[201] category displays various data about server, database, connection and allows to perform server backup and debugging.
- The [Single Sign-On](#)^[203] category allows to establish integration between Collaborator and [single sign-on authentication services](#)^[124].
- The [Remote System Integrations](#)^[204] category allows to establish integration with third-party systems, like JIRA, GitHub, GitLab or Bitbucket.
- The [Users](#)^[206] category allows to create users, view user statistics and edit user accounts.
- The [Groups](#)^[212] category allows to create and organize user groups. Groups of users are used for reporting, filtering and for assigning reviews to multiple users.
- The [Review Templates](#)^[230] category allows to create and manage review templates: sets of roles, custom fields, and other options that determine the behavior and rules of a review.
- The [Custom Fields](#)^[236] category allows to create your own fields for users to annotate reviews, participants and defects with necessary information.
- The [Checklists](#)^[250] category allows to create and manage a list of items that should be checked in every review.
- The [Roles](#)^[253] category allows to specify the rights and privileges of review participants.
- The [Automatic Links](#)^[260] category specifies regular expression patterns to treat certain text fragments as links.
- The [Notification Templates](#)^[262] category allows to customize the content of notification e-mails that Collaborator sends to review participants.

- The [Archive](#)^[273] category allows to archive content cache files which are no longer used.
- The [Savings Report](#)^[275] category displays how much money you have saved by using Collaborator compared to non-code reviewed process.
- The [Syntax Highlighting](#)^[277] category allows you add, manage and delete syntax highlighting schemas for various computer languages.

3.3.1 System

General system settings are organized into the following tabbed sections:

- [Settings](#)^[169]
- [Display Options](#)^[171]
- [Access Restrictions](#)^[174]
- [Review Process](#)^[178]
- [Electronic Signatures](#)^[182]
- [Bug-Tracking Integration](#)^[184]
- [External Clients](#)^[184]
- [File Types](#)^[186]
- [LDAP Settings](#)^[188]

Settings Tab

This tab contains settings that affect the entire system.

System

External URL:

TEST

URL to the main page of this web server as seen by external clients.
Used everywhere from notification emails to reporting.

SAVE

REVERT

External URL The URL to use as the valid externally accessible URL of the Collaborator server. If the port number is other than default 8080, then specify it as well.

This URL will be reported to clients, used in notification emails, webhooks and so forth.

! The server's External URL should be accessible to all Collaborator clients, database server, repository hosting services, issue-trackers and other remote systems. You may need to configure your firewall or enable tunneled connections to expose it.

System-wide Message

System Message:	
<small>Message to be displayed throughout the system.</small>	
<div style="display: flex; justify-content: center; gap: 10px;"> SAVE REVERT </div>	

System Message

Administrators can optionally insert a message to be displayed throughout the system.

This can be useful for reminders, Collaborator announcements, or general information.

Extra Home Page Links

Name:	Try It
Extra Dashboard Links:	Agile Testing - http://smartbear.com/agile-testing?ga_source=PRC&ga_campaign=agile API Testing - http://smartbear.com/api-testing?ga_source=PRC&ga_campaign=API ALM - http://smartbear.com/products/software-development/application-lifecycle-management-tool?ga_source=PRC&ga_campaign=ALM
<small>Please follow the format: LinkTitle - link</small>	
<div style="display: flex; justify-content: center; gap: 10px;"> SAVE REVERT </div>	

Name

A caption for the block of extra links.

Extra Dashboard Links

List of additional links to be displayed on the Home page. One link per line. Links should be specified in the following format: LinkTitle - LinkURL

Fun Facts

Show System Fun Facts:	<input type="text" value="Show"/> ▼ <small>On the user's home page, should automatic system-generated fun facts be included in the rotation? If this is hidden and there are no custom fun facts, the "Fun Facts" feature will be completely disabled.</small>
Extra Fun Facts:	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div> <small>Additional "Fun Fact" text to include in the rotation, one fact per line.</small>

Show System Fun Facts

Fun facts are lines of information displayed on the home page. Collaborator rotates through a number of internal facts based on aggregate review metrics.

If this is set to "Hide" and there are no extra fun facts listed, this feature is completely disabled.

Extra Fun Facts

Additional lines to be displayed can be entered in this field.

Display Options Tab

This tab contains settings that affect the visual appearance of web-interface, its labels, prompts and so forth.

Display Options	
Company / Unit:	<input type="text" value="ACME"/>
User Login Prompt:	<input type="text"/>
	Text to display on the login page above the "User Name" input field.
Global "Create User":	Show <input type="button" value="v"/>
	Should the "Create New User" form be displayed on the Collaborator Enterprise log-in screen?
Default Tab Width:	<input type="text" value="4"/>
	Default width of a tab, in spaces, to use when displaying source code for all users.
Chat Refresh Interval:	<input type="text" value="15"/>
	The minimum time (in seconds) to wait before auto-updating conversations.
Name Abbreviation Length:	<input type="text" value="2"/>
	The minimum number of letters to use when abbreviating user names during a review. Typically 2 or 3.
Defect Label (singular):	<input type="text" value="defect"/>
	User-visible label for "defect" (lower case), e.g. "Marked defect fixed".
Defects Label (plural):	<input type="text" value="defects"/>
	User-visible label for "defects" (lower case), e.g. "Can not finish because there are open defects".
Group Label (singular):	<input type="text" value="Group"/>
	User-visible label for "Group", e.g. "This Review is associated with that Group".
Groups Label (plural):	<input type="text" value="Groups"/>
	User-visible label for "Groups", e.g. "Select one of the Groups to associate with this Review".
Compact View:	Disabled <input type="button" value="v"/>
	Choose Compact View to make the UI use less vertical space
Allow Users to Move Comments:	Disabled <input type="button" value="v"/>
	[BETA] Allow users to move comments in MS Word documents (.doc and .docx), PDFs and images. Supported in Chrome and Firefox only.
Company Logo on Login:	Yes <input type="button" value="v"/>
	
	Current logo is shown above. Click the logo to upload a new image file (.png).
Company Logo on Home:	No <input type="button" value="v"/>
	Whether to display your company logo on Home screen.
Select default WebUI theme:	Classic <input type="button" value="v"/>
	Specifies the default theme of WebUI. Individual users may select their own WebUI theme via User Preferences.
Display list of logged in users when denied access:	No <input type="button" value="v"/>
	Show usage license list when access denied based on insufficient licenses.
Show active(floating-seat) users list in the license page:	No <input type="button" value="v"/>
	Shows report as a table of active(floating-seat) users with info of their activities on the license page.
	<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>

Company / Unit

Arbitrary text that will be displayed at the top of the Collaborator web page. This distinguishes the server from other servers. This personalizes the server and also makes it easy for users to distinguish between different installations you might have.

User Login Prompt

The text to display on the front page when the user logs in. This text is displayed just below the "Username" field.

The default text suggests using the same login as the version control system, however you might want to change this to be more specific, or in the case of [LDAP authentication](#)^[100], you could instruct the user to use that login.

Global "Create User"	<p>If you are not using LDAP authentication^[106], every user in the system must be explicitly created. The system administrator can create users at any time, but an easier technique is to allow users to create their own accounts from the "Login" screen^[288].</p> <p>When this option is enabled, this create-account form is displayed, otherwise it is hidden.</p> <p>This option does not make sense if you are using LDAP authentication because in that case user accounts are created automatically when a user first successfully authenticates on the Login screen.</p>
Use Global Tab Width	<p>If 'Yes' all users will use the same tab width. If 'No' each user can configure their own preference (the global setting is the default).</p>
Global-Tab Width	<p>Width of a tab (in spaces) for all users to use when displaying reviewed files^[353].</p>
Chat Refresh Interval	<p>The minimum time (in seconds) to wait before auto-updating chat conversations^[388] in the Diff Viewer^[351].</p> <p>If increase the refresh time, new chat display will become less responsive, but server load will decrease. This also reduces contention for connections on the browser side because most modern browsers limit the number of simultaneous server connections to 2.</p>
Name Abbreviation Length	<p>The minimum number of letters to use when abbreviating user names during a review.</p>
Defect Label (singular)	<p>User-visible label for "defect" (lower case). Shows in phrases, like "Marked defect fixed". If the word 'defect' has a negative connotation in your environment, specify a different word (for instance, "item" or "finding" and so on).</p>
Defects Label (plural)	<p>User-visible label for "defects" (lower case). Shows in phrases, like "Can not finish because there are open defects". If the word 'defects' has a negative connotation in your environment, specify a different word (for instance, "items" or "findings" and so on).</p>
Group Label (singular)	<p>User-visible label for "Group". Shows in phrases, like "This Review is associated with that Group".</p>
Group Label (plural)	<p>User-visible label for "Groups". Shows in phrases, like "Select one of the Groups to associate with the Review".</p>
Compact View	<p>When this option is enabled, some user interface elements will be collapsed to occupy less vertical space.</p>

Allow Users to Move Comments	[BETA] Allow users to move comments in MS Word documents (.doc and .docx) ^[358] , PDFs ^[375] and images ^[372] . Supported in Chrome and Firefox only.
Company Logo on Login and Company Logo on Home	<p>Whether to display your company logo on Login screen and on Home and Review Summary screens, respectively. See Branding Your Server^[156].</p> <p>Once enabled, click on the placeholder/current logo and upload new image with your company logo.</p> <p>The company logo images must be in PNG format. Transparent background is recommended. Image resolution is not limited. Large images will be resized to fit into 640x480 area on Login screen and into 250x50 area on Home and Review Summary screens.</p> <p>Note: Ability to display your company logos on Login and Home screens is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the comparison page^[3].</p>
Select default WebUI theme	Specifies the default pre-defined theme of WebUI client ^[286] . The specifies the visual style of Web client for new and existing users (unless they explicitly specify their own preferred WebUI theme ^[296] in User Preferences).
Display list of logged in users when denied access	Whether to display a list of currently logged-in users on the Login page ^[289] when a new user fails to login because of insufficient licenses.
Show active (floating-seat) users list in the license page	Whether to display a list of active floating-seat users on the Licensing page ^[198] .

Access Restrictions Tab

This tab contains settings that control different types of access restrictions.

Access Restrictions	
Allow Regular Users to Perform System Dump:	No <input type="button" value="v"/> Give users the option to show system debugging information. This may be helpful if individuals need to contact SmartBear customer support to resolve an issue. However, some administrators may not wish to give individual users access to all the system information.
Reports Access:	Enabled for everyone <input type="button" value="v"/> Selects which users are allowed to see the "Reports" section of the user interface.
Allow Regular Users to Access Web UI Debugging:	Yes <input type="button" value="v"/> Gives the users the option to access the Web UI debugging link 'Report Error' located at the bottom of the Home and Review Summary pages
Subscriptions Access:	Users <input type="button" value="v"/> Select whether subscriptions are editable only by administrators, or editable by all users
Subscriptions Mode:	Mandatory Enforce Role <input type="button" value="v"/> Select whether subscriptions are mandatory with an enforced role, or are mandatory but allow role changes, or are suggested and can be removed by the author, or are disabled
Allow Subscriptions as Moderator:	Allow <input type="button" value="v"/>
Allow Subscriptions as Reviewer:	Allow <input type="button" value="v"/>
Allow Subscriptions as Observer:	Allow <input type="button" value="v"/>
Restrict Access to Fix Defect:	No <input type="button" value="v"/> Should the system restrict the participants that can mark a defect fixed. If set to Yes, only the creator of the defect and administrators will be able to mark a defect fixed. Otherwise, all roles that are allowed to mark a defect fixed will have such a privilege.
Allow Create Review to:	Everyone <input type="button" value="v"/> By default, every user can create a review. If set to "Group members only", only users that belongs to a group other than "All Users" will be able create reviews.
Restrict Access to Review:	Anyone <input type="button" value="v"/> [Explain] Restrict who can access a review, based on group membership and/or review participation.
Restrict Uploads to / Deletes from Review:	No <input type="button" value="v"/> By default, should the system restrict uploads to and deletes from reviews. If set to Yes, only review creator, authors, and administrators will be able to upload files to or delete files from the review. Otherwise, all participants will be able to upload to or delete from the review. This option can be overridden by the creator of the review.
Search:	Allow searching of all text. <input type="button" value="v"/> Note: Limiting search to review numbers only will increase performance.
Allow Invite by Email?:	Yes <input type="button" value="v"/> Allow users to invite others using the email-regex configurable below?
Restrict Email Invite:	. * <input type="text"/> To limit this feature to email addresses that can be invited to reviews, enter the regular expressions here. E.g. '*@company.com'. To prevent emails from being sent through this feature, select 'No' for "Allow Invite by Email" above.
Allow Archive to zip:	Administrators <input type="button" value="v"/> Restrict who can use review archive functionality, based on user role.
Allow Archive to Zip for Open Reviews:	No <input type="button" value="v"/> Should it be possible to archive a review in any phase. Otherwise only completed, cancelled or rejected reviews can be archived.
Allow duplicate group names:	Don't Allow <input type="button" value="v"/> Should it be possible to have two or more groups with the same name.
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Allow Regular Users to Perform System Dump

Should regular users be allowed to perform system dump?

Selecting "Yes" will give users, as well as administrators, access to the system debugging information.

Reports Access

Who should be allowed to view the "Reports" section of the user interface? You can choose everyone, everyone but with review permissions applied, only administrators, or disabled (no one).

Enabled for everyone: Everyone will see the "Reports" section; no restrictions are enforced on what information is returned.

Respect permissions: Everyone will see the "Reports" section; users can only see report content for reviews that they can access. Note that since administrators can always access all reviews, this setting does not affect the content of their reports.

Administrators only: Only administrators will see the "Reports" section.

Disabled: No one will see the "Reports" section.

**Subscriptions
Access**

Selecting "Users" will allow users, as well as administrators, access to edit subscriptions. Choose "Administrators" to give access to only administrators.

**Subscriptions
Mode**

Mandatory Enforce Role: Subscribed users must be participants in a review, and they must use the role specified on their subscription page.

Mandatory do not Enforce Role: Subscribed users must be participants in a review, however they can change their role once added to the review.

Requested: Subscribed users are automatically added to a review but can be manually removed.

Disabled: Subscriptions are not used.

**Allow
Subscriptions
as ...**

The Administrator can choose whether users that subscribe to a review can subscribe as a Moderator, Reviewer, or Observer by choosing "Allow" or "do not Allow" from the drop downs below.

**Restrict
Access to Fix
Defect**

Should the system restrict the participants that can mark a defect fixed?

If set to Yes, only the creator of the defect and administrators will be able to mark a defect fixed. Otherwise, all roles that are allowed to mark a defect fixed will have such a privilege.

**Allow Create
Review to**

Specifies who is able to create new reviews. By default, every user can create a review. If set to "Group members only", only users that belongs to a group other than "All Users" will be able create reviews.

**Restrict
Access to
Review**

Should the system always restrict access to review such that only certain users are allowed to view the review? In each review^[31] the review creator can select to further restrict access. Administrators can always access all reviews.

Anyone: No global restrictions on who can access reviews

Group Based: Users must have access to the review's associated group^[21] to access reviews

Participants: Users must be participants in the review to access reviews

Participants and Group Based: Users must be participants in the review and currently have access to the review's associated group to access reviews

	<u>Participant or Group Based</u> : Users may be participants in the review or have access to the review's associated group to access reviews
Restrict Uploads to / Deletes from Review	<p>Should only creators of a review be allowed to upload files to and delete files from a review?</p> <p>If set to "yes," only review creators and administrators will be allowed to upload files to or delete files from the review. However, the option will be available on the Create Review screen^[309] to override at the review creator's discretion. If set to "no," all participants will be allowed to upload and delete files.</p> <p>Note: This feature is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the comparison page^[3]</p>
Search	Sets the limits on the Search feature. "Allow Searching of all text" enables unrestricted searching, while "Limit searches to review numbers only" limits the search feature to only allow searching for review ID numbers.
Allow Invite by Email?	Should it be possible to invite a colleague by e-mail ^[862] ?
Restrict Email Invite	Used for the "Invite a colleague" feature, the regular expression in this field is used to match email addresses that can be invited to Reviews. For example, '[\w\.-]+@company.com'.
Allow Archive to zip	<p>Should the system restrict access to archiving of reviews^[153]?</p> <p><u>Administrators</u>: Only users with administrator^[210] privileges can use this feature.</p> <p><u>Group Administrators</u>: Only users with administrator^[210] or group administrator^[217] privileges can use this feature.</p> <p><u>All users</u>: All users, who can access the review (based on the review permissions^[176]), can use this feature.</p>
Allow Archive to Zip for Open Reviews	Should it be possible to archive a review in any phase. Otherwise only completed, cancelled or rejected reviews can be archived.
Allow duplicate group names	Should it be possible to create groups having the same names?

Review Process Tab

This tab contains settings that control different aspects of review process.

Review Process Options

Allow System Administrator to Perform Reviews:	<input type="text" value="No"/> <p>Should the System Administrator account be allowed to create reviews? Normally the System Administrator account is reserved for managing licenses and configuring the server. However, in some cases, notably when LDAP authentication is used, the System Administrator may also need to create reviews</p>
Allow "Mark All Read":	<input type="text" value="Yes"/> <p>Should a user be able to "mark all comments read" without having to click on each one individually in the side-by-side view? This feature makes this operation faster but you run the risk of users not really reading all comments before marking them as "read."</p>
Allow Reopening Completed Reviews:	<input type="text" value="Don't Allow"/> <p>Once a review has completed, should participants be allowed to re-open the review just by making an additional comment? If not allowed, an administrator is still able to re-open a review by clicking a link.</p>
Allow Editing General Information of Completed Reviews:	<input type="text" value="Don't Allow"/> <p>Once a review has completed, should participants be allowed to edit the review title and custom fields? This setting does not apply to participant custom fields.</p>
Create a Commit Action Item for Completed Reviews:	<input type="text" value="Create"/> <p>When a pre-commit review has completed, should the review author(s) get an Action Item prompting to commit the changes?</p>
Allow Deleting/Canceling Reviews:	<input type="text" value="Allow"/> <p>Allow the review creator or author to cancel the review at any time, otherwise only an administrator can cancel a review. Other participants are never allowed to cancel a review.</p>
Allow Reject Review:	<input type="text" value="Administrators only"/> <p>Restrict who can reject a review. Administrators can always reject reviews, but Reviewers can only reject if specifically enabled through this option.</p>
Default Review Deadline:	<input type="text" value="0"/> days <p>If set to non-zero, this is the default number of days until reviews are due. If zero, users will not be prompted for a review deadline.</p>
Show Metrics:	<input type="text" value="Yes"/> <p>Should users be able to see that metrics are collected including time spent in review, number of defects, and so on? If disabled, metrics are still collected and can be retrieved from the database, however the information is not displayed to the user during review or in the reports section.</p>
Character Sets for Diff Viewer:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>UTF-8 UTF-16LE UTF-16BE ISO-8859-1 ISO-8859-15</p> </div> <p>Give users the option to view file contents in various character sets. Usually Collaborator's character set auto-detection will detect the correct character set, but when it does not, users will be able to select between these character sets for displaying the code. To avoid confusion, limit this list to the character sets that you expect your users to require. Supported Character Sets</p>
Enable User File Activity Log:	<input type="text" value="Yes"/> <p>Whether to enable logging of each file review action for each user, in order to create File Activity reports in the future.</p>

Allow System Administrator to Perform Reviews

Should the main system administrator be allowed to participate in reviews?

If you are using internal authentication the setting is typically "no" because the main "admin" account is special and should be used only for system configuration and not to actually do reviews.

If you are using [LDAP authentication](#)^[106] the setting is typically "yes" because the main administrator is usually an actual human being who will also want to participate in reviews.

This setting affects whether the system account is allowed to [create a new review](#)^[309] and whether it appears in, for example, drop-down lists for [review participants](#)^[311].

Allow "Mark All Read"

Should users be given the option to "mark all conversations read" in one click in the conversation area of the [Diff Viewer](#)^[388]?

This is a convenient operation, so most administrators leave this enabled. However this makes it easy for someone to not actually read a lot of comments because they are not forced to visit each conversation individually.

Allow Reopening Completed Reviews

Once a review has completed, should participants be allowed to re-open the review just by making an additional comment?

If not allowed, an administrator is still able to re-open a review by clicking a link.

Allow Editing General Information of Completed Reviews

Once a review has completed, should participants be allowed to edit the review title and custom fields? This setting does not apply to participant custom fields.

Create a Commit Action Item for Completed Reviews

By default, when a pre-commit review is completed, the author(s) are given an action item as a reminder to commit the changes to the underlying source control system. The author then has the option of using the Tray Notifier to commit the changes. In some workflows, this is not the correct behavior. In that case, choose "Do Not Create" to avoid this prompt.

Allow Deleting/ Cancelling Reviews

Should the review creator or author be able to cancel the review at any time?

If "do not allow" is selected, only an administrator will have the permissions to cancel a review. Other participants are never allowed to cancel a review.

Allow Reject Review Reject review allows a user to stop a review which has passed the planning state but yet in a terminal state such as completed or cancelled. Rejecting a review is different than cancelling or deleting because the administrator can require the user to specify a reason for the rejection. The reason values can be configured in the Review Custom Fields section of the administration pages.

Administrators can always reject reviews. Select Administrators and Reviewers to allow non-observer participants to reject reviews.

Default Review Deadline If set to non-zero, this is the default number of days until reviews are due. If zero, users will not be prompted for a [review deadline](#)^[310] when creating a new review.

Show Metrics Should users be able to see that metrics are collected including time spent in review, number of defects, and so on?

If set to "No", metrics are still collected and can be retrieved [directly from the database](#)^[807], however the information is not displayed to the user [during review](#)^[332] or in the [reports](#)^[407] section.

Character Sets for Diff Viewer Give users the option to view file contents in various character sets.

Usually Collaborator's character set auto-detection will detect the correct character set, but when it does not, users will be able to select between these character sets for displaying the file contents. To avoid confusion, limit this list to the character sets that you expect your users to require.

Click [Supported Character Sets] to view all supported character sets.

Enable User File Activity Log Specifies whether to log file activity of review participants. The gathered data is used when generating File Activity section of [Review Detail Reports](#)^[412].

Review Reject Reasons

Description:	List of reasons to choose from when rejecting a review. Le
Review Reject Reasons:	<div style="border: 1px solid #ccc; padding: 5px; min-height: 80px;"> No, thank you. Because I said so. It's not you, it's me. No, it's you. </div>

SAVE
REVERT

Review Reject Reasons List of reasons to choose from when rejecting a review^[318]. Leave this list empty if providing a reason is not required.

Review Hide Files Options

Who can hide files:	<input type="text" value="Authors"/> Select who can hide/unhide files at the review.
What phases can you hide/unhide files:	<input type="text" value="Planning only"/> Select phases when you can hide/unhide files at the review.
When a hidden file changes:	<input type="text" value="Keep the file hidden"/> What if we add a new changelist and the hidden file has changed?

Who can hide files Specifies who is able to hide and unhide files in reviews. Available options are: *Authors, Participants, Nobody*.

What phases can you hide/unhide files Specifies on what phases users could hide and unhide files. Available options are: *Planning only, Planning and Annotating* and *At any time*.

When a hidden file changes Specifies what action to perform in case the hidden file has been changed. Available options are: *Keep the file hidden* and *Un-hide the file*.

Electronic Signatures Tab

This tab holds settings that control electronic signature process.

Note: *Electronic Signatures are only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)*^[3].

Global Electronic Signatures Options	
Enable Electronic Signatures:	<input type="text" value="No"/> <p>Global based electronic signatures utilizes the below Review roles and adds an additional sign-off process for ALL reviews. Users in the selected roles will be required to sign or decline the review once it is completed. Template based electronic signatures are configured in Admin > Roles which are associated to a review template. This ensures that only the reviews that have selected a template with electronic signatures configured will require the selected roles to sign or decline the review once it is completed.</p>
Roles that are required to sign-off on Reviews:	<input type="text" value="Author"/> <p>These are the roles that are required to approve or decline each Review as part of the Electronic Signature process.</p>
Sign Review Prompt:	<input type="text" value="Sign this Review"/> <p>Text to display in the Review Summary Page to prompt the User to sign the Review.</p>
Decline Review Prompt:	<input type="text" value="Decline this Review"/> <p>Text to display in the Review Summary Page to prompt the User to decline the Review.</p>
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Enable Electronic Signature

Electronic Signatures allow users in the selected role(s) to either sign off on or decline to sign off on a completed review.

Global based electronic signatures adds an additional sign-off process for all reviews. Users whose roles were selected in the "[Roles that are required to sign-off on Reviews](#)"^[183] setting will be required to sign or decline the review once it is completed.

Template based electronic signatures add an additional sign-off process only to reviews with specific templates. Users whose roles were selected in the [Role Configuration](#)^[259] screen will be required to sign or decline the review once it is completed.

Roles that are required to sign-off on Reviews

Here, the admin can select one or more roles that will be prompted to sign off on Completed reviews.

This setting takes effect when global based electronic signatures are enabled.

Sign Review Prompt

This is the text that will appear on the review summary screen next to the Sign button.

**Decline
Review
Prompt**

This is the text that will appear on the review summary screen next to the Decline button.

Bug-Tracking Integration Tab

This tab holds settings that allow create items in your bug tracking system directly from Collaborator reviews.

Bug-Tracking Integration

Create Bug URL:

URL to create a new bug. Optionally use BUGSUBJECT as the initial bug subject line.
Example using FogBugz:
<http://fogbugz.bugserver/?command=new&pg=pgEditBug&sTitle=BUGSUBJECT>
Example using Bugzilla:
http://bugzilla.bugserver/enter_bug.cgi

**Create Bug
URL**

The URL to your bug tracking system that creates a new bug. Optionally use the special text BUGSUBJECT as the starting subject line for the bug. This setting is used when the user is prompted to create a bug in your external issue tracking system.

To track a defect externally, the user must first create the defect in Collaborator, then select and edit that defect to choose the 'Track Externally' option.

Below are examples of URL, for some popular bug tracking systems:

FogBugz: <http://bugserver/default.php?command=new&pg=pgEditBug>

Bugzilla: http://bugserver/enter_bug.cgi

JIRA: <http://bugserver/secure/CreateIssue!default.jspa>

External Clients Tab

This tab holds settings that relate to Web Client, Command-Line Client, GUI Client and other desktop clients.

External Clients	
Client Installer Link:	<input type="text" value="https://support.smartbear.com/downloads/collaborator/"/> <input type="button" value="TEST"/> <p>URL to the version of the client installers that you want presented to users of the system. This is typically redirected to an Intranet page maintained by the administrator. The main Collaborator Enterprise download site is: https://support.smartbear.com/downloads/collaborator/</p>
Minimum Client Build:	<input type="text" value="12000"/> <p>Minimum build number acceptable for the following clients: - ccollab command-line client - p4collab Perforce integration client - ccollabgui GUI client - Eclipse plugin The oldest stable, compatible client build number is 12000 and the most recent build is 12000.</p>
Login Ticket Time-To-Live:	<input type="text" value="0"/> hours <p>The number of hours a login ticket should remain valid. A value of '0' indicates that the ticket remains valid for 30 days.</p>
Clear login cookie on session termination:	<input type="checkbox"/> False <p>If enabled, login cookies will be stored in browser session and will be cleared when the browser is closed. Otherwise, login cookies will be stored in browser cache. In either cases, users will be logged out from server and license will be released after 60 minutes of inactivity or after pressing logout button.</p>
Secure authentication cookies:	<input type="checkbox"/> False <p>Specifies how to handle login cookies over HTTPS and HTTP connections. - If server uses HTTPS and the setting is enabled, cookies will be sent over HTTPS, otherwise they will be sent over HTTP. - If server uses HTTP and the setting is enabled, cookies will be cleared when the browser is closed, otherwise they will be kept in browser cache. In all cases, users will be logged out from server and license will be released after 60 minutes of inactivity or after pressing logout button.</p>
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Client Installer Link

URL to the version of the client installers that you want presented to users of the system.

This is typically redirected to an intranet page maintained by the administrator.

Minimum Client Build

Minimum allowable build number for the various client applications including the [Command-Line Client](#)^[443], the [GUI Client](#)^[435], the [Tray Notifier](#)^[533], and [IDE Clients](#)^[463].

Use this to ensure your clients are reasonably up to date. This is especially important if there is a feature or bug-fix you know is necessary for your system.

The help text in the GUI will identify the oldest stable, compatible build number and will list the most recent known build number for your reference.

Login Ticket Time-To-Live

Defines how long a login ticket should remain valid. A value of '0' indicates that the ticket remains valid for 30 days.

Clear login cookie on session termination

If enabled, login cookies will be stored in browser session and will be cleared when the browser is closed. Otherwise, login cookies will be stored in browser cache.

In either cases, users will be logged out from server and license will be released after 60 minutes of inactivity or after pressing logout button.

Secure authentication cookies

Specifies how to handle login cookies over HTTPS and HTTP connections.

- If server uses HTTPS and the setting is enabled, cookies will be sent over HTTPS, otherwise they will be sent over HTTP.
- If server uses HTTP and the setting is enabled, cookies will be cleared when the browser is closed, otherwise they will be kept in browser cache.

In all cases, users will be logged out from server and license will be released after 60 minutes of inactivity or after pressing logout button.

File Types Tab

This tab controls how Collaborator server should treat certain types of files: images, binary, executables.

Restricted Files

Restricted File Types: *.exe, *.bat, *.msi, *.dmg, *.sh

Comma-separated list of filename matching expressions used to restrict upload of file types. Wildcard characters '*' and '?' are valid.
Example: *.ppt, *.pptx

SAVE **REVERT**

Restricted File Types

Specifies which files cannot be uploaded to reviews (to avoid malicious file uploads). By default Collaborator blocks the following file types: executable files (.exe), batch files (.bat), Windows Installer files (.msi), Mac OS disk images (.dmg) and Unix script files (.sh).

Filename matching is done using the '*' and '?' wildcards characters. '*' matches 0 or more contiguous characters, and '?' matches exactly one character. The character matching is case-insensitive on Windows platforms and case-sensitive on all other platforms.

Binary Files

Binary File Types:	*.cdr, *.dwg, *.psd
<p>Comma-separated list of filename matching expressions used to designate binary file types. Wildcard characters '*' and '?' are valid. Example:</p>	
<div style="display: flex; justify-content: center; gap: 10px;"> SAVE REVERT </div>	

Binary File Types

Binary files attached to reviews are not displayed in the [Diff Viewer](#)^[357], and instead must be opened by external applications. Here you can configure which files are to be treated as binary.

Filename matching is done using the '*' and '?' wildcard characters. '*' matches 0 or more contiguous characters, and '?' matches exactly one character. The character matching is case-insensitive on Windows platforms and case-sensitive on all other platforms.

Image Files

Image File Types:	*.gif, *.jpg, *.jpeg, *.png
<p>Comma-separated list of filename matching expressions used to designate image file types. Wildcard characters '*' and '?' are valid. Example: *.gif, *.png, *.jpg</p>	
<div style="display: flex; justify-content: center; gap: 10px;"> Save Revert </div>	

Image File Types

Image files are reviewed in the browser in the Diff Viewer using a special [image Diff Viewer](#)^[369]. Here you can configure which files are treated as images. By default, GIF, JPEG, and PNG images are handled as images. The content of the files must be renderable by the users' browsers for images to actually be reviewable. Images that require special software to view should be treated as [Binary Files](#)^[187] so they can be rendered by that software.

Filename matching is done using the '*' and '?' wildcard characters. '*' matches 0 or more contiguous characters, and '?' matches exactly one character. The character matching is case-insensitive on Windows platforms and case-sensitive on all other platforms.

LDAP Settings Tab

This tab is visible only if [LDAP or Active Directory authentication](#)¹⁰⁶⁾ is enabled.

This tab specifies whether Collaborator should retrieve user settings and group members from the LDAP or Active Directory and defines the mapping between Collaborator user settings and LDAP/AD scheme attributes. For LDAP directories, mapping users requires additional configuration, as described in [LDAP or Active Directory Authentication](#)¹¹³⁾.

LDAP/AD attribute mapping	
Enable LDAP mapping:	<input type="button" value="Yes"/> <input type="button" value="v"/> Do you want to enable LDAP mapping?
Display name:	<input type="text" value="{displayName}"/> Mapping of your LDAP/AD scheme attributes to the Display name
First name:	<input type="text" value="{givenName}"/> Mapping of your LDAP/AD scheme attributes to the First name
Last name:	<input type="text" value="{sn}"/> Mapping of your LDAP/AD scheme attributes to the Last name
Phone:	<input type="text" value="{telephoneNumber} mobile: {mobile}"/> Mapping of your LDAP/AD scheme attributes to the Phone
Department:	<input type="text" value="{company} {department}"/> Mapping of your LDAP/AD scheme attributes to the Department
Email:	<input type="text" value="{mail}"/> Mapping of your LDAP/AD scheme attributes to the Email
Enable LDAP groups synchronization:	<input type="button" value="Yes"/> <input type="button" value="v"/> Do you want to enable LDAP group synchronization?
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Enable LDAP mapping

Specifies whether Collaborator should retrieve user settings from the LDAP or Active Directory?

Once enabled, Collaborator will automatically populate user settings when a user logs into the server.

Display name	Defines the mapping between the respective user settings ^[29] and the LDAP or Active Directory scheme attributes.
First name	
Last name	
Phone	May contain attribute placeholders (attribute names enclosed in curly braces) and plain text: "{telephoneNumber} mobile: {mobile}".
Department	
Email	Placeholders will be replaced with the matching attribute values for the particular user: "+1987456 mobile: +28467913". If the attribute does not exist, or its value is not specified for some particular user, the placeholder will be replaced with blank value: "+1987456 mobile: ". To learn about possible LDAP and Active Directory attributes, see this comprehensive list
Enable LDAP groups synchronization	Specifies whether Collaborator should synchronize its native groups with group information from the LDAP or Active Directory? Once enabled, Collaborator will check user membership in groups in the LDAP/Active Directory and automatically add this user to the corresponding groups on the Collaborator server. If a group with the specified name does not exist, Collaborator will act according to the "Automatically create new groups" setting below. See Syncing Groups ^[22] for details.
Automatically create new groups	Specifies whether to create new groups on the Collaborator server when a group with the specified name does not exist. If enabled, Collaborator will create new group, if disabled Collaborator will only synchronize membership of existing groups.
Automatic group creation filter	A Java-style regular expression used to filter LDAP groups before automatic group creation. Any FQDN that does not match the pattern will be excluded.

3.3.2 Email

This category holds SMTP server settings and other settings related to out-going notifications of review activity.

In order to establish e-mail, poke and calendar notifications for Collaborator users, administrator must properly configure the SMTP server settings below. Otherwise, notifications cannot be sent.

Configuration	
Automatic Periodic Notification	
Email All Users	
Email Configuration	
Enable Email Notifications:	Yes <input type="checkbox"/> If enabled, users will have the option to receive notifications of review activity via email.
SMTP Host:	mail Address of the SMTP server for sending out-going email. Changes to the SMTP host require restarting Collaborator Enterprise.
SMTP Port:	25 (default: 25) Port number for the SMTP server for sending out-going email. Changes to the SMTP port require a server reboot to take effect.
SMTP Username:	collabnotifications User Name for the SMTP server for sending out-going email. If this field is left blank, behavior will default to anonymous SMTP.
SMTP Password: (again to confirm) Password for the SMTP server for sending out-going email.
Send email as User:	Always use the default email address Emails sent by Collaborator Enterprise can appear to come from specific users or from the default email address above.
Default "From" Address:	collaborator@mycompany.com The default "from" email address for all out-going mail. This has to be a real email address on the mail server. Typically this is the system maintainer's email address.
Subject Prefix:	[Collaborator Enterprise] Prefix to prepend to email subject lines to facilitate mail filtering.
Notification List:	 A single email address, usually of an email list, that will receive all notification emails. If blank, no emails will be sent to the list.
Tech Support Address:	support@smartbear.com The email address to use for technical support questions, e.g. for the link in the page footer. By default this is SmartBear Customer Support at support@smartbear.com, but often this really should be the system maintainer's email address.
Use iCal organizer:	Enabled Populate the "Organizer" field of the iCal invitations with the actor who triggered the invite. This may confuse some non-Microsoft e-mail clients, and the iCal may show up as an attachment.
Test Email Address:	 If set, send a test email to this address.
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Enable Email Notifications

Email notifications are now optional. If enabled, users will have the option to receive notifications of review activity via email.

SMTP Host

The domain name or IP address of the server to use to send SMTP messages. This machine must be configured to accept mail from the server on which Collaborator is installed.

If your email server is Exchange you will need to get your Exchange administrator to enable anonymous SMTP.

If this setting is not established properly, no emails will be sent.

SMTP Port	<p>The port number to connect on when sending SMTP messages, typically 25. The port number might be different if a spam filter is set up in front of the primary server; in this case you probably want to bypass the spam machine, or else put a rule on the spam machine to allow Collaborator to send messages.</p> <p>If this setting is not established properly, no emails will be sent.</p>
SMTP UserName and SMTP Password	<p>User name and password to use for SMTP servers that require authentication. If this field is left blank, behavior will default to anonymous SMTP.</p> <p>Do not specify these values if your SMTP server uses secure connection but does not require authentication. Otherwise an error will occur.</p>
Send Email as User	<p>Determines which user will be listed in the "From Address" in emails sent by Collaborator.</p> <p>If you select to use the "default address," emails will come from the default address given elsewhere in this configuration screen. Otherwise the system will attempt to send email from the user that caused the message to be sent. For example, if a user causes a "new review" notification to be sent, that user's email address will be used as the "from" address.</p> <p>Some messages cannot be associated with a particular user and will still be sent from the default address.</p>
Default "From" Address	<p>The email address to use in the "From Address" field in notification emails. Typically this is the system maintainer's email address.</p>
Subject Prefix	<p>This text will be pre-pended to the subject line of any email sent by Collaborator. This assists end users with mail filtering and helps to train or configure spam-filters to identify Collaborator notifications as non-spam.</p>
Notification List	<p>Specifies an e-mail address or mailing list that will receive a copy of <i>every notification</i> ⁽³⁰²⁾ that Collaborator sends. This field can be blank.</p>
Tech Support Address	<p>The email address to use for technical support questions. For example, this is used in the [Support] link in the web page footer.</p> <p>By default this is the email address for Collaborator Technical Support, but often the system maintainer wants to get these emails first for internal resolution.</p>

Use iCal organizer

Specifies whether to populate the Organizer field in [iCalendar invitations](#)³³⁶. If enabled, the user who has pressed "iCal Everyone" will be set as organizer. Otherwise, the Organizer field will be blank.

Important: Populating the Organizer field may confuse some non-Microsoft e-mail clients, and may result in iCalendar invitations be interpreted as file attachments.

Test E-Mail Address

Usually left blank; if an address is supplied here a test message will be sent to this address when the form is submitted. This is used to test the email system. The email address is not saved.

Note: If the E-Mail address includes non-Latin symbols, type it inside quotation marks. For example, if you need to use the `äaddress@example.com` address, input it as `"äaddress"@example.com`.

Automatic Periodic Notification

On this tab you can set-up email notifications about stalled reviews.

Configuration	Automatic Periodic Notification	Email All Users
Automatic Periodic Notification		
Stalled Review Threshold:	<input type="text" value="72"/> hours <small>When a review is in progress and a reviewer hasn't marked the review complete <i>and</i> hasn't made a comment in this number of hours, send a special notification to that reviewer. To disable stalled review notifications, set this value to zero (0).</small>	
Stalled Review Alert Repeat:	<input type="text" value="24"/> hours <small>If a reviewer is stalling a review (see above), repeat the notification this often (in hours) if the review continues to be stalled.</small>	
Stalled Review Check Interval:	<input type="text" value="10"/> minutes <small>The system will check for reviews being stalled at this regular interval. Too short of an interval could result in performance issues.</small>	
Review Deadline Threshold:	<input type="text" value="72"/> hours <small>When an in progress review is within this many hours of its deadline, send a special notification. To disable approaching deadline notifications, set this value to zero (0).</small>	
Review Deadline Alert Repeat:	<input type="text" value="24"/> hours <small>When an in progress review is approaching its deadline (see above), repeat the notification this often (in hours) until the review completes.</small>	
Review Deadline Check Interval:	<input type="text" value="10"/> minutes <small>The system will check for reviews approaching the deadline at this regular interval. Too short of an interval could result in performance issues.</small>	
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>		

Stalled Review Threshold

When a review is in progress and a reviewer has not marked the review complete and has not made a comment in this number of hours, send a special notification to that reviewer. To disable stalled review notifications, set this value to zero (0).

**Stalled
Review
Alert
Repeat** If a reviewer is stalling a review (see above), repeat the notification this often (in hours) if the review continues to be stalled.

**Stalled
Review
Check
Interval** Specifies how often to check for stalled reviews.

**Review
Deadline
Threshold** When an in progress review is within this many hours of its deadline, send a special notification. To disable approaching deadline notifications, set this value to zero (0).

**Review
Deadline
Alert
Repeat** When an in progress review is approaching its deadline (see above), repeat the notification this often (in hours) until the review completes.

**Review
Deadline
Check
Interval** Specifies how often to check for reviews approaching deadline.

Bulk-Email Facility

The Email All Users tab allows the administrator to send an email to [all users](#)^[206] in the system. This is easier than maintaining a separate email mailing list for users.

A typical use is to broadcast scheduled maintenance of the system, especially before and after a [system upgrade](#)^[81].

Email All Users

Use this form to send an email to all users who have configured their email settings. Users who have not configured their email address in User Preferences will not receive an email.

Subject:

Message:

SEND

3.3.3 Version Control

Collaborator integrates closely with your version control server to select which files to review. The administrator can configure the Collaborator server to be able to connect directly with version control. This allows users to select checked-in changelists to review from the web UI without having to install and configure client-side tools. Users can also configure their connection to the various version control servers using the [client tools](#)^[424] so they can review changes before committing them.

If you use more than one version control server Collaborator recognizes this and displays the files from the different servers separately.

Configuring Version Control Server Templates

Each version control system that Collaborator supports for server-side integration has a configurable "template". The configuration in this template is copied in to a version control server entry when you click **Create** in the **Configure a new version control server** form, or when a version control server entry is created automatically because a client uploaded files from a server that does not [map](#)^[196] to any of the existing version control server entries.

Version Control Server Templates	
	SCM System
[Edit]	ClearCase
[Edit]	Git
[Edit]	Perforce
[Edit]	Rational Team Concert
[Edit]	Subversion

Each version control system that supports server-side version control integration includes different options in the Version Control Server Template:

- [Git](#)⁵⁶⁵
- [Perforce](#)⁶⁸⁰
- [Subversion](#)⁷¹²
- [ClearCase](#)⁵⁸⁵
- [Rational Team Concert](#)⁶¹⁵

Configuring Servers

Next tab lists all currently configured servers, or shows a message if you have not created any yet:

Version Control Server Templates		Version Control Servers
Version Control Servers		
	Title	Type
[Edit] [Delete]	SB Git Server Configuration	Git
[Edit] [Delete]	Jason's Perforce Server	Perforce

Entries in this table are created automatically when one of the client tools uploads files from a server that does not [map](#)¹⁹⁶ to any of the servers we currently know about. You can edit or delete entries in this list. A form to create a new entry always appears at the bottom of the screen:

Configure a new version control server

Configuring a version control server here allows Collaborator Enterprise to integrate directly with the version control system, allowing changelists to be uploaded through the web UI. If your version control system is not in this list, that's OK! You'll want to use the typical approach of installing the Collaborator Enterprise client software to create your reviews instead.

SCM System:

CREATE

Editing Server Configuration

The exact fields you need to configure the connection to a version control server depends on the version control system:

Most of the version control server entries have at a minimum these two fields:

Title:	<input type="text" value="Version control at MyCompany"/>
Attach changelists from browser:	<input type="text" value="Enabled"/> <small>Allow users to attach committed changelists from this server to a review directly from the Web UI, without having to install any client programs.</small>

Title	The title is used to indicate this version control server to other users of Collaborator, so it should be something that everyone will understand, even if they are going through proxies, VPNs, or other such things.
Attach changelists from browser	If enabled, this feature lets users select committed changelists to review directly from the web browser, without having to install any client programs.

All of the version control systems also require that you specify the path to the command-line client executable for that system. This is a good example of something you might want to specify in the [version control server template](#)^[194], since it is probably going to be the same for all the version control server entries you configure.

If you want to enable the [Attach changelists from browser](#)^[196] feature, then the server will also require some sort of authentication. This is the version control server account that Collaborator should use when querying that version control server. Note that Collaborator will use this account no matter who is logged in!

You can click **Test Connection** at the bottom of the form to make sure that Collaborator can successfully communicate with the server. NOTE: This test simply verifies that specified server appears to be a valid repository; it does NOT verify that your username and password can update the repository.

Client Configuration Mapping

An unfortunate thing happens when client tools are separately configured for version control access: they can have different names for the same physical version control server. It is hard or impossible for the Collaborator server to automatically figure out whether these two names represent the same server or two different version control servers.

The administrator can fix this using the **Client Configuration Mapping** section of the server configuration form. You can configure [Java-style regular expressions](#) to match against each of the fields that our client tools upload. If the version control server entry was created automatically then these fields are already filled out and you probably do not need to change them. The fields available are different for each version control system:

When you submit this form, the list of configurations updates to indicate which configurations match and which do not match the current patterns. This makes it easy to iterate until you have covered exactly the right cases.

3.3.4 Triggers

Collaborator can execute an external script or application when certain events occur. This is useful when integrating Collaborator with other systems such as issue-tracking, ALM, or builds.

Note: This feature is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)^[31]

Possible uses of triggers include:

- Mirror defects created in Collaborator into an external issue-tracking system.
- Set a flag in a system when a review completes.
- Intercept all notifications sent from Collaborator to log them or to send the notification in a way other than standard email or RSS.
- Send notifications to a mailing list when certain events occur.

The Triggers section of the Administration page lets you configure the various triggers:

- **Review Created** - Review created. No files or participants yet.
- **Review Phase Changed** - Review phase changed. For instance from "Planning" to "Inspection" or from "Inspection" to "Canceled".
- **Added Files** - Files and/or changelists attached to a review.
- **Notifications Sent** - A email, RSS or other type of notification was sent to someone.
- **Defect Activity** - A defect was added, modified, or marked open/fixd. Use the defect unique ID to determine the difference.
- **User Created** - A new user was created. This runs whether or not the creation was automated or manual.
- **Role Changed** - A participant's role has changed. For instance, a participant was added to a review, removed from a review or promoted from one role to another.



The screenshot shows a configuration form for the 'Review Phase Changed' trigger. The form has a title bar 'Review Phase Changed' and a subtitle 'Review phase changed, e.g. Planning -> Inspection or Inspection -> Canceled.' Below the subtitle, there are two main input fields: 'Executable:' and 'Parameters:'. The 'Executable:' field is a text input with a placeholder 'Specify full path to the executable. Max 1024 characters.' The 'Parameters:' field is a larger text area with a placeholder 'Specify parameters for the executable. Max 2048 characters.' At the bottom of the form, there are two buttons: 'SAVE' and 'REVERT'.

The Executable field specifies the application to run. If this is a script, use the script executable here (for example, Perl, PHP, Python). This must be an absolute path to the application; the form will complain if the file cannot be found or executed.

The `Parameters` field is a list of arguments to supply to the executable. If this is a script, the absolute path to the script itself is typically the first argument.

The `Executable` field could be up to 1024 characters long, and the `Parameters` field could be up to 2048 characters long. However if your character encoding system uses more than 1 byte per character, the file path/parameters could be shorter (to fit into 1024/2048 bytes).

There are many special arguments you can supply that will be replaced by Collaborator when the application is executed. For example, `${review.title}` will be replaced by the title of the review associated with the given triggering event. See the [Variable Substitution](#)¹⁴⁹ chapter for details.

Please note, that not all of the variables are available at the moment the trigger fires. In this case they will return "Not available" instead of their value. For example, the `${review.title}` is not available for the Review Created trigger as the review does not yet has a title when the trigger fires.

3.3.5 Licensing

This category holds information on your current Collaborator license and allows you to configure your license.

The licensing is done by the administrator on the Collaborator server. Collaborator client software doesn't have to be licensed.

Current License

On this tab, you can see information about your current Collaborator license.

The screenshot shows the 'Current License' configuration page. It includes the following information:

- Product:** Collaborator Enterprise
- Seats:** 100 fixed-seat licenses purchased. Currently using 3 seats.
- Seats Expire On:** 2019-09-17 00:00:00 UTC
- Upgrades Expire On:** 2019-09-17 00:00:00 UTC
- Node ID:** [Redacted]
- Company Key:** trial
- Users Denied Access:** 1 users denied access in last 30 days.

Below this information is a table titled 'Active(floating-seat) users list':

User ID	User Name	Source	Last Login	Last Activity
2	jsmith	WebUI login	07-02-2019 16:15:33	07-02-2019 16:33:06
3	hector	WebUI login	07-02-2019 16:36:10	07-02-2019 16:36:11
4	lynn	json api	07-02-2019 16:34:16	07-02-2019 16:34:20

Product The Collaborator [edition](#)³ the license applies to.

Seats	<p>The number and type of seats available under the license and the number of seats currently consumed.</p> <p>SmartBear offers fixed-seat and floating-seat licenses for Collaborator. See Licensing^[87] for more information on the types of licenses and license consumption.</p>
Seats Expire On	The date and time when the license expires.
Upgrades Expire On	The date and time when license upgrades expire.
Node ID	<p>A unique identifier of your Collaborator server. All the licenses issued for the server are linked to the Node ID.</p> <p>During server migration^[88], the server's Node ID is carried over, and so are all the licenses linked to it.</p>
Company Key	<p>The company key supplied by SmartBear after purchasing the license.</p> <p>The company key is "trial" for temporary licenses and a word or phrase for permanent ones.</p>
Users Denied Access	<p>The number of login attempts failed due to licensing reasons^[89] in the last 30 days.</p> <p>The number is not incremented if a login attempt fails due to the user having been disabled^[210] or entering incorrect login or password.</p>

Additionally, this tab can display a list of active floating-seat users. To display it, you need to enable the [Show active\(floating-seat\) users list in the license page](#)^[174] setting.

Once enabled, it will display information about floating-seat users who are currently logged-in: their ID, username, source of license consumption, as well as date and time of last login and last activity.

Configuration

On this tab, you can configure your Collaborator license. See [this topic](#)^[91] for instructions on how to configure your license.

The screenshot shows the 'Configuration' page of the SmartBear software. The page has a blue header with two tabs: 'Current License' and 'Configuration'. The 'Configuration' tab is active. Below the header, there is a section titled 'Configuration'. On the left side of this section, there are two labels: 'Company Key:' and 'License Codes:'. The 'Company Key' field contains the text 'trial'. Below it, there is a text box with the text 'Company key supplied by SmartBear after purchase. Leave blank for trials.' The 'License Codes' field is a large text area containing a blurred list of license codes. Below this field, there is a text box with the text 'The complete list of license codes provided to you by SmartBear. This will be the same list for all of your server installations.' Below the text box, there is a button labeled 'UPDATE FROM SMARTBEAR'. Below the button, there is a text box with the text 'If your server has an external Internet connection, you may press this to request updated licenses directly from SmartBear'. Below the text box, there is a button labeled 'SAVE'. Below the 'SAVE' button, there is a button labeled 'GENERATE NEW SERVER NODE ID'. Below the button, there is a warning message: 'WARNING: Do not use this function unless you've been instructed to do so by SmartBear sales or technical support.' Below the warning message, there is a text box with the text 'Generates and stores a new server Node ID. This invalidates all existing licenses for this server, including trial licenses. After regenerating the Node ID you will need to contact the SmartBear sales team to get a new license code.'

Company Key The company key supplied by SmartBear after purchasing the license.

The company key is "trial" for temporary licenses and a word or phrase for permanent ones.

License Codes The list of 32-character license codes for the Collaborator server provided by SmartBear.

If you have the license set up, you can use the **Update from SmartBear** button to request a license update directly from the SmartBear license server.

! In order for this feature to work, your computer must have a functioning Internet connection, and proxies and firewalls in your network should allow connection to the Collaborator license server (URL <http://licensing.codecollaborator.com>, port 80).

Once you are finished editing the license configuration, select **Save** to save changes.

Generate New Server Node ID

To generate a new server Node ID, you can use the **Generate New Server Node ID** button.

! Do not use this function unless you've been instructed to do so by SmartBear sales or technical support. It invalidates all the existing licenses for the server, including trial licenses. After generating a new Node ID, you will need to contact the SmartBear sales team to get a new license code.

3.3.6 System Status

Collaborator system status reports can be found on the System Status page.

Graphs

The "Peak Usage" chart plots the maximum number of simultaneous users, measured by day. The "Active Users" chart displays the total number of users during the day:



This is most useful when determining the number of floating seats necessary to handle your Collaborator traffic. In the example above, 5 floating seats would be sufficient.

To learn more about Collaborator licenses: difference between fixed-seat and floating seat licenses, how Collaborator server counts license consumption and so on, see [Collaborator Licensing](#) ⁸⁷.

Server Backup/Debugging Dump

This tab allows you to create and download a whole system dump:

Server Backup/Debugging Dump

Use this form to produce a Zip file containing all server data, useful for backup or debugging.

Data Format:	Normal	<input type="text"/>
Selecting "obfuscated" will cause all file content, user names, file paths, and other potentially sensitive information to be replaced with gibberish or generic text (e.g. User 1, User2). Normally you shouldn't use this mode, but it can be useful when creating data dumps that will be sent to SmartBear technical support if there is a security concern.		
Server Logs:	Include server logs	<input type="text"/>
Warning: including all server logs increases how long it takes to generate the dump file and will increase the size of the dump file.		
File Contents:	No file content	<input type="text"/>
Warning: including all file content can result in a multi-gigabyte dump file.		
Which Data:	Complete database dump	<input type="text"/>
Getting just the system configuration is useful if you want to "start over" with the same basic configuration but with no reviews.		

DOWNLOAD DUMP FILE

It contains the following settings:

1. **Data Format:** Normal - Selecting "Normal" will leave the data as is.

Obfuscated - Selecting "Obfuscated" will change the data to conceal sensitive information.

2. **Server Logs:** Include server logs - Selecting this will include server logs in dump. Note: If you are creating a dump file to send to technical support, it is important to include the server logs.

do not include server logs - Selecting this will not include server logs in the dump file.

3. **File Contents:** No file content - Selecting "No file content" will not include file content.

Include all file content - Selecting this will include all file content, but this will also cause a longer download.

4. **Which Data:** Complete database dump - This must be selected for a whole system dump.

System configuration only - no review data - Selecting this will only save the system settings.

Once you have filled out the form, click the "**Download Dump File**" button to download the database dump file. This is a ZIP file containing all your database data in a platform- and database-independent XML format, plus additional files that describes your server environment.

To learn more about creating system dumps, see [Server Backup and Migration](#)^[9].

System Information

Other tabs of System Status page contain multiple server parameters which can be useful when debugging problems. These tabs will be mainly used to gather system information for our Technical Support when trouble should arise.

3.3.7 Single Sign-On

These settings allow to configure integration between Collaborator and [single sign-on authentication services](#)^[124].

Note: *Single sign-on authentication is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)*^[3].

Single Sign-On (SSO) Status

Enable Single Sign-On:

Enables single sign-on authentication using the currently active SSO configuration.

These are your existing SSO configurations. You may use this screen to make changes.

New SSO Configuration

SSO configuration type:

SSO Configurations:

	Configuration
[Edit] [Delete]	CROWD SSO (Active)

The **Single Sign-On (SSO) Status** section indicates current state of single sign-on integration and allows to enable or disable pre-configured SSO configurations.

! If you experience troubles with single sign-on authentication and cannot login to your Collaborator server (wrong redirect URLs, cannot login as admin and so on), you can also disable single sign-on authentication via the `-Dcom.smartbear.server.sso.disable=true` [Java VM option](#)^[1093].

The **New SSO Configuration** section allows creating new SAML or Crowd OpenID configurations. You can have only one configuration of each type. On the **SSO Configurations** section you can edit or delete your existing SSO configurations.

Check the following sections to learn how to configure single sign-on services:

- [Configuring SSO via SAML](#) ^[126]
- [Configuring SSO via Crowd OpenID](#) ^[134]

3.3.8 Remote System Integrations

This section indicates which of remote system integrations are currently operating and allows to enable or disable pre-configured integrations.

The screenshot shows a web interface with two main sections. The top section, titled "Integration Status", contains six rows of configuration options, each with a label, a dropdown menu, and a descriptive text. The options are: "Enable JIRA Integration with Collaborator:" (Yes), "Enable TFS Integration with Collaborator:" (No), "Enable GitHub Integration with Collaborator:" (Yes), "Enable GitLab Integration with Collaborator:" (Yes), "Enable Bitbucket Integration with Collaborator:" (Yes), and "Enable JIRA Legacy Integration with Collaborator:" (No). A "SAVE" button is located below these options. The bottom section, titled "Detailed logging", contains one row with the label "Enable detailed logging:", a dropdown menu set to "No", and a descriptive text: "Enable detailed logging for GitHub, GitLab and/or Bitbucket integrations. The log will be saved to the remoteSystem.log file located in the tomcat/logs directory. Detailed logging is not typically needed." A "SAVE" button is located below this section.

Besides, in this section you can enable detailed logging of remote system actions. If enabled, Collaborator will generate logs and store them to the `<Collaborator Server>/tomcat/logs/remoteSystem.log` file.

To create new integrations or configure existing integrations, switch to the [Repository Hosting Services](#) ^[204] or [Issue-Tracking Services](#) ^[205] setting pages.

3.3.9 Repository Hosting Services

These settings allow to configure integration between Collaborator and the remote repository hosting services like [GitHub, Bitbucket, Bitbucket Server or GitLab](#) ^[733].

On the **Configure Remote Systems** tab you can edit your existing integrations. You can have multiple configurations for remote repository services.

The screenshot shows the 'Configure Remote Systems' interface. At the top, there are two tabs: 'Configure Remote Systems' (selected) and 'Easy Add Repository'. Below the tabs is a green informational box with text: 'These are your existing remote system integrations for pull requests. You may use this screen to make changes. The best way to add the pull request code review workflow to a new repository is the Easy Add Repository wizard tab at the top of this screen.'

Below the green box is the 'New Remote System Configuration' section. It features a 'Remote System:' dropdown menu with 'GitHub' selected and a 'CREATE' button.

Below that is the 'Remote System Configurations List' section, which contains a table with the following data:

	Configuration
[Edit] [Delete]	JohnSmithSB/HelloWorldApp
[Edit] [Delete]	JohnSmithSB/my-awesome-project
[Edit] [Delete]	Bitbucket Server (On-Premise)
[Edit] [Delete]	JohnSmithSB/TestRepoForCollaborator

To create a new configuration for a remote system, use either the **Easy Add Repository** tab or the New Remote System Configuration section of the **Configure Remote Systems** tab.

The screenshot shows the 'Easy Add Repository' wizard. At the top, there are two tabs: 'Configure Remote Systems' and 'Easy Add Repository' (selected). Below the tabs is a green informational box with text: 'This wizard allows you to easily configure code reviews for pull requests. It will configure Collaborator, and the webhooks on the repository for you. You can specify whether to add all repositories or only the selected repositories. The on-premise server host name should be provided if applicable. Webhooks for the remote repositories will always point to the external URL, as configured in the System->Settings section of Collaborator. Additional settings, such as branches to track, and what happens when a review completes will be applied to all selected repositories. You may adjust these settings by running this wizard again, or editing the associated entry on the Configure Remote Systems tab above.'

Below the green box is the 'Add repository for:' dropdown menu with 'GitHub' selected and a 'NEXT' button.

Read the following sections to learn how to create and configure remote system integrations:

- [Configuring GitHub Integration](#) ⁷⁴⁸
- [Configuring Bitbucket Cloud Integration](#) ⁷⁵⁷
- [Configuring Bitbucket Server Integration](#) ⁷⁶⁴
- [Configuring GitLab Integration](#) ⁷⁶⁹

3.3.10 Issue-Tracking Services

These settings allow to configure integration between Collaborator and remote issue-tracking services like [JIRA](#) and [TFS](#) ⁷⁷⁸.

On the **Configure Remote Systems** tab you can create new configurations and edit your existing integration configurations. You can have multiple configurations for multiple issue-tracking services.

Configure Remote Systems

These are your existing remote system integrations for issue tracking systems like JIRA, TFS Work Items. You may use this screen to make changes.

New Remote System Configuration

Remote System: JIRA

Remote System Configurations List

	Configuration
[Edit] / [Delete]	JIRA
[Edit] / [Delete]	TFS
[Edit] / [Delete]	TFS server 2

Read the following sections to learn how to create and configure remote system integrations:

- [Configuring JIRA Integration](#)^[782]
- [Configuring TFS Work Item Integration](#)^[784]
- [Configuring JIRA Legacy Integration](#)^[791]

3.3.11 Users

The user management page lets you add, disable, and manage user accounts.

Statistics

The statistics tab shows information about users and usage of Collaborator:

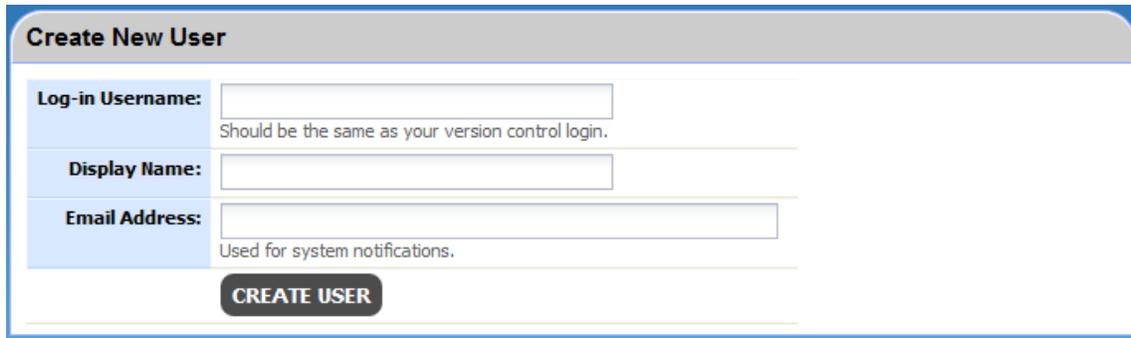
Statistics	
Registered users: 87	Have logged in: 28
Disabled users: 57	Administrators: 18
Active in past 30 days: 22	Active in past 24 hours: 9
Logged in now: 2	

[\[Graphs\]](#)

This can help monitor your usage and determine how many seats are necessary.

Creating New Users

This form lets you create new users in Collaborator. If you are using [LDAP authentication](#)^[106] you will not see this form because users are created automatically when they first log into the system.



Create New User

Log-in Username:
Should be the same as your version control login.

Display Name:

Email Address:
Used for system notifications.

CREATE USER

Login names must be unique in the system; Collaborator will not allow you to create a second user with the same login. The display name is used to denote the user in the interface. Typically, display name contains the user's full name, but may include any other information: initials, nickname, position, department, and so on. Email address is used for sending notification messages.

Note: If the E-Mail address includes non-latin symbols, type it inside quotation marks. For example, if you need to use the `äaddress@example.com` address, input it as `"äaddress"@example.com`.

Important: When creating new user accounts, it is a good idea to make the login name identical to the user's version control login. One advantage is that the user does not have to remember a new login. Another advantage is that certain features are enabled in Collaborator because it can correlate users from version control changelists with Collaborator users. Finally cross-system reporting becomes much easier when the logins are the same.

After you create a user you are returned to the same screen. This makes it easy to add multiple users quickly.

The User List

The user list shows every user in the system along with key information about each:

User List

 Normal User
  Administrator
  Disabled
 Group Administrator
  Logged in Now
  Active in past 30 days

Sort By: Login
 Filter: Hide disabled users
 Search by Login:
 Items per page: 100
 Prev: <
 Pages: 1...1
 Next: >

		Login	Display Name	Phone	Last Activity	Review Dump
1	[Edit]	  addison	Addison Gonzales		2018-04-20 17:43:25	[Review data]
2	[Edit]	 admin	Administrator		(never logged in)	[Review data]
3	[Edit]	 alana	Alana Mooney		(never logged in)	[Review data]
4	[Edit]	 carissa	Carissa Page		(never logged in)	[Review data]
5	[Edit]	  clive	Clive Sinclair		2018-04-25 11:37:57	[Review data]
6	[Edit]	 danielle	Danielle Chandler		(never logged in)	[Review data]
7	[Edit]	 haley	Haley Burke		(never logged in)	[Review data]
8	[Edit]	  hector	Hector Patton		2018-04-23 14:41:20	[Review data]
9	[Edit]	 hedy	Hedy Skinner		(never logged in)	[Review data]
10	[Edit]	 jeremy	Jeremy Anderson		(never logged in)	[Review data]
11	[Edit]	 jordan	Jordan Savage		(never logged in)	[Review data]
12	[Edit] [Log Off]	  jsmith	John Smith	+13264655	2018-05-16 12:34:47	[Review data]

You can sort the user list by:

- Login
- Display Name
- Last Activity (oldest first)
- Last Activity (most recent first)

You can filter the user list by:

- Show all users
- Hide disabled users
- Show only logged-in users
- Show only administrators
- Show users missing name
- Show users missing email
- Show users missing phone number

Also, you can search for user logins that contain the specified letters.

When your server has multiple users, the user list is divided into several pages. The controls above and below the user list allow to select how many items will be displayed per page and navigate to next and previous pages.

The [Edit] link allows you to update any [user setting](#)^[209] from basic contact information to personal display and notification settings. The [Log Off] link allows you to immediately [log off a logged-in user](#)^[209]. The [Review data] link allows to generate a [dump with reviews of this particular user](#)^[164].

The first column of icons tells you several things about the user's recent activity and how the user is counting towards [server licensing](#)^[87].

Icon	Logged in?	Consuming floating-seat license?	Consuming fixed-seat license?
	Yes	Yes	Yes
	No	No	Yes
(none)	No	No	No

The second column of icons tells you about the user's access rights:

Icon	Description
	User with full administrator privileges
	User with group administrator ^[217] privileges
	Regular user
	Disabled user. (Not allowed to log in and don't count in licensing.)

You will notice that the **admin** account never counts towards licensing. This is one of the special characteristics of the [System Administrator Account](#)^[217].

Log User Off

Administrators also have the ability to force a user to log out of Collaborator to make a seat available. To do so, just click the [Log Off] link that will appear to the left of the logged in username. This feature should be used carefully as the user will immediately be logged off. Once a user is forced out, the next time they access Collaborator, they will be required to reenter their username/password to gain access.

Deleting & Disabling Users

You cannot delete users in Collaborator because the user record is necessary for reporting and for viewing old reviews that they were a part of.

However you can *disable* a user. Disabling a user does several things immediately:

- The user can no longer log in.
- If the user is already logged in, he is automatically and immediately logged off.
- The user does not show up in standard user lists, like in list for inviting to a review.
- The user will not receive any notifications or [broadcast messages](#)^[189].
- The user immediately does not count towards either floating-seat or fixed-seat [licensing](#)^[87].

The user will continue to appear in the general user list at the end, and an administrator can re-enable a user at any time.

To disable or enable a user, click the [Edit] link next to that user on the user list and change the "Is Enabled" flag:

Is Enabled:	Disabled <input type="button" value="v"/>
Disabled users are not allowed to log in and don't count in licensing. You cannot delete a user because the record is needed for reports and to view old reviews; disabling a user is the only way to remove from the system.	

Administrative Access

Users with administrative access are allowed to access the "Admin" menu from the menubar and all screens therein. They also have a variety of other permissions described elsewhere in this manual, including but not limited to:

- Administrators can look at *all* reviews, regardless of whether they have been [marked restricted](#)^[309].
- Administrators can do anything with defects in *any* review: create, delete, edit, externalize, and mark fixed, regardless of their role or even non-participation in that review.
- Administrators can edit characteristics of *any* review including changing custom field content, changing the list of participants, and canceling the review.

To set or clear a user's administrative access, click the [Edit] link next to that user on the user list and change the "Is Administrator" flag:

Is Administrator:

Warning: Be careful if you are an administrator and you are editing your own user information. If you say that you are not an administrator, you are not from that point forward! If you do this by accident it can be remedied by another administrator, or the System Administrator in particular (see below).

The Special "System Administrator" Account

One user account is special: The System Administrator Account. How do you know which account is this special one? If you are using internal authentication, the System Administrator Account is always called `admin` (this cannot be changed). If you are using [LDAP authentication](#)^[106], the account is determined [during installation](#)^[68].

The System Administrator Account has the following special properties:

- There can be only one. One to rule them all.
- The System Administrator is *always* an administrator; administrative access cannot be revoked. (This is prevented in the user interface so you cannot revoke access, even by mistake.)
- The System Administrator can *always* log in. Even if the server license has been exceeded, this account is *still* allowed to log in.

Advanced User Permissions

Additionally to giving users full-fledged administrator privileges, you may grant some users with elevated permissions. Users with elevated permissions may perform some of administrative tasks: manage user groups, templates, custom fields, checklists, roles, automatic links.

To assign a user as [group administrator](#)^[217], open [Groups](#)^[212] category, click the [Edit] link next to the desired user group, scroll to the Group Administrators section and add the user to the list of group administrators.

Group Administrators of this Group

Group Admins:

Available Users Hide Disabled Users

Addison Gonzales (addison)
 Administrator (admin)
 Alana Mooney (alana)
 Carissa Page (carissa)
 Danielle Chandler (danielle)
 Halee Burke (halee)
 Hector Patton (hector)
 Hedy Skinner (hedy)
 Jeremy Anderson (jeremy)
 John Smith (jsmith)
 Jordan Spence (jordan)

Current Users

Jeremy Anderson (jeremy)

ADD >
 ADD ALL >>
 < REMOVE
 << REMOVE ALL

1 - 22 of 22 1 - 1 of 1

Group administrators are regular (not full administrator) users who are allowed to administer this group. Group administrators can edit group settings, add or remove [user members](#)^[218] of the group.

To set or clear a user's elevated permissions, click the [Edit] link next to that user on the user list and change the appropriate flags:

Can Edit Templates:	No <input type="button" value="v"/>
Can Edit Custom Fields:	No <input type="button" value="v"/>
Can Edit Checklists:	No <input type="button" value="v"/>
Can Edit Roles:	No <input type="button" value="v"/>
Can Edit Automatic Links:	No <input type="button" value="v"/>
Can Create Child Groups:	No <input type="button" value="v"/> This setting only applies for the Group Admin!

Once enabled, the user will become able to modify the respective categories of administrative settings.

3.3.12 Groups

User "Groups" is an optional feature that allows you to define groups of users within your organization, so reviews can be associated with a group. Groups can be used to model your organization's hierarchy and/or project assignments. Each group can contain multiple users and can also contain other groups. Each user can be in more than one group. You can specify group administrators who are able to maintain individual groups.

The word "Group" is configurable in the [General Settings](#)^[169], so you could change it to "Team", or "Project", or whatever else.

Note: User groups are only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)^[3].

In this section:

- [Association With Reviews](#)^[213]
- [Restricting Access](#)^[214]
- [Group Hierarchies](#)^[214]

- [Maintaining Groups](#)^[214]
- [Review Pool Subscriptions](#)^[218]

Association With Reviews

If a user is a member of a single group that [can be associated with a review](#)^[217], reviews created by that user are automatically associated with that group. If a user is a member of more than one group that [can be associated with a review](#)^[217], an additional field is displayed when creating a review:

The screenshot shows a review creation form for 'Verify foo function'. At the top, it indicates 'YOU ARE NOT A PARTICIPANT IN THIS REVIEW.' and 'PLANNING' status. Statistics show 0 Participants, 0 Files, 0 Chats, and 0 Defects. A 'DONE EDITING' button is present. The form fields are: Review Title (Verify foo function), Role (not participating), Created (on 2018-04-18 at 16:50 by John Smith), Group (All Users), Template (dropdown menu with options: All Users, Developers - Core, Developers - UI, Documentation Reviewers), Deadline (N/A), Completed On (N/A), and Restrict Access (Anyone).

The list of groups to select from is calculated by first creating a list of all groups that contain the review creator as a member. All groups in that list are then checked to see if they are a child group of any other group(s). Parent groups are added to the list recursively.

In the settings for a group there is an option to [disallow associating that group with reviews](#)^[217]. This is useful for creating groups that are used for reporting or filtering only. When a group and all its sub-groups cannot be associated with reviews, then this group is not displayed in the Group list. When a group cannot be associated with reviews, but some of its sub-groups can be associated with reviews, then the parent group is displayed in the Group list, but cannot be selected.

Associating a group with a review makes it easier to select participants for that review because the Person list can optionally be filtered by group. The filter is calculated by starting with the users that are members of the selected group. If the selected group also contains child groups, then the users that are members of those child groups will also be added. The search for child groups is done recursively.

Changing the Group being used in a review

We **do not recommend** changing a group on phases other than Planning phase. Changing a group will remove existing participants that do not belong to a new group. If participants belong both to existing group and to new group, they will be retained.

Restricting Access

Groups can be used to limit access to reviews by setting **Restrict Access to Review Content**^[175] in the general settings. When the group access restriction feature is used, the list of users who have access to the review is calculated by starting with the users that are members of the group that is associated with the review. If that group also contains child groups, then the users that are members of those child groups will also be added. The search for child groups is done recursively. Finally, if the group associated with the review is a child of any other group(s) then the users that are members of those parent groups will also be added. The search for parent groups is done recursively.

Group Hierarchies

It may be difficult to understand how best to use groups based on the rules given above. We have provided a few examples of how they are usually used:

- [Using Groups for Organizational Hierarchy](#)^[224]
- [Using Groups for Projects](#)^[225]
- [Using Groups for Organizational Hierarchy and Projects](#)^[227]

Maintaining Groups

Groups can be created and modified in one of two ways: manually (with the web user interface - see the sections below, starting with **Creating New Groups**^[215]), or with the command-line scripting command `collab admin group create`) or automatically via the command-line scripting `collab admin group sync` command.

If you have only a few groups it is easiest to manage them manually. If you have many groups or if you are mirroring them from an external system like LDAP, it is best to manage them automatically using the "sync" command.

The command-line "sync" command interface is provided to make it easy to mirror group definitions in to Collaborator from an external system. The `collab admin group sync` command uses the contents of an XML file ([schema](#)) to update Collaborator's group definitions. See the [Syncing Groups](#)^[220] topic for more information.

Collaborator tracks which groups were created manually and which were defined via ccollab admin group sync. Groups that were defined manually are not overwritten as a result of using ccollab admin group sync. See the [Using Groups for Organizational Hierarchy and Projects](#)²²⁷ example to see how this can be useful.

Creating New Groups

To create a new user group, first specify its display name, then click **Create Group**.

Once a group is created, the group will appear in the Group List. Group administrators will only see groups listed that they can administer.

	Display Name	Reviews	Associate with Reviews	Review Pool Participant	Disabled	Description
[Edit/Delete]	Developers - Core	0	Yes	No	No	
[Edit/Delete]	Developers - UI	0	Yes	No	No	
[Edit/Delete]	Documentation Reviewers	0	Yes	No	No	
[Edit/Delete]	QA	0	Yes	No	No	
[Edit/Delete]	UX	0	Yes	No	No	

You can sort and filter group list, also, you can search for groups that contain the specified letters.

When your server has multiple groups, the Group List is divided into several pages. The controls above and below the list allow to select how many items will be displayed per page and navigate to next and previous pages.

In the Group List, you can edit the configuration details or delete the group by clicking the appropriate link. The Group List also shows the number of reviews associated with the group, whether or not the group can be associated with reviews, whether or not the group is enabled, and any descriptions given to the group.

Deleting a Group

To delete a group, click the [Delete] link next to the group's title in the Group List. You can only delete a group if it is not associated with reviews. If the group is associated with reviews, you must first associate those reviews with a different group before deleting it; alternatively, you could instead disable the group in order to prevent future reviews from being associated with it.

Group administrators are further restricted to only being able to delete groups that they are group administrators of and that have no child groups. This restriction is to prevent group administrators from indirectly creating top-level groups.

Editing Group Properties

To edit a group, click on the [Edit] link next to the group's title in the Group List. You will be directed to the "Edit Group" page.

General		Review Subscriptions	File Subscriptions	Template Subscriptions
Edit Group				
Title:	<input type="text" value="Development"/>			
Guid:	e7b0bf29acc15fd1b03cb3daa944896b <small>Globally Unique ID - used to identify this group in scripts.</small>			
FQDN:	<input type="text" value="CN=Development,OU=Groups,DC=ad,DC=acme"/> <small>Fully Qualified Domain Name</small>			
Description:	<input type="text" value="Main development team"/>			
Associate with Reviews:	Yes <input type="button" value="v"/> <small>Should users be allowed to associate this group with reviews?</small>			
Review Pool Participant:	No <input type="button" value="v"/> <small>Should this group be available for selection as a Review Pool participant?</small>			
Status:	Enabled <input type="button" value="v"/>			
<input type="button" value="SAVE"/>				

Title	Human-readable title for the group, used in drop-down menus and other UI elements. This does not have to be unique across all groups.
Guid	Machine-readable ID for group, unique across all groups. If the group was created using the Web Client, this is generated automatically. If the group was created using the sync command, this ID is supplied in the XML file.
FQDN	Fully qualified domain name (FQDN) of the group. This name is used when synchronizing groups ^[113] with LDAP or AD.
Description	Human-readable description for the group. This is displayed on the " New Review " ^[310] page when associating a group with a review ^[213] .

Associate with Reviews

If this is set to "Yes", this group is selectable from the Group drop-down list when [associating a group with a review](#)^[213]. If "No", this group will be hidden or disabled in the Group list. For an example, see [Using Groups for Organizational Hierarchy and Projects](#)^[227].

Review Pool Participant

Specifies whether this group is a [Review Pool](#)^[863], that is it could be selected as a participant of a review.

Status

Specifies whether the group is enabled or disabled. Groups can be disabled when they are no longer in use. Disabled groups still show up in reports because reviews may be associated with them.

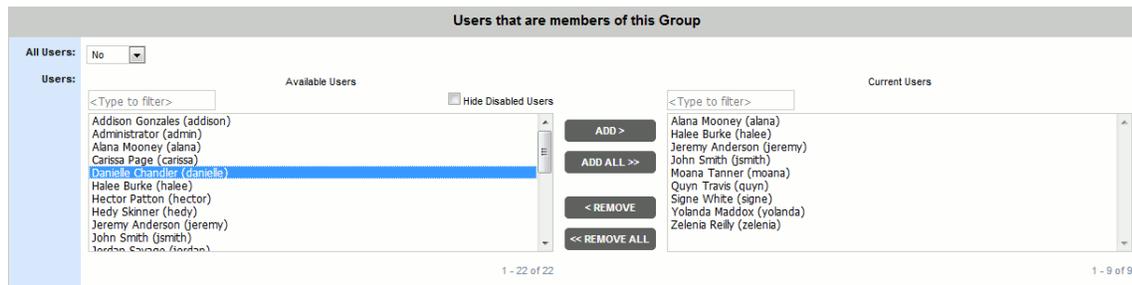
Group administrators are regular (not full administrator) users who are allowed to administer this group. Group administrators can [edit](#)^[216] all of the fields of the group.

Group administrators can add or remove group administrators for the group, even themselves, but they can not remove the last group administrator from the group.

Group administrators can add or remove [user members](#)^[218] of the group. Users that are group administrators may or may not also be regular members of the group.

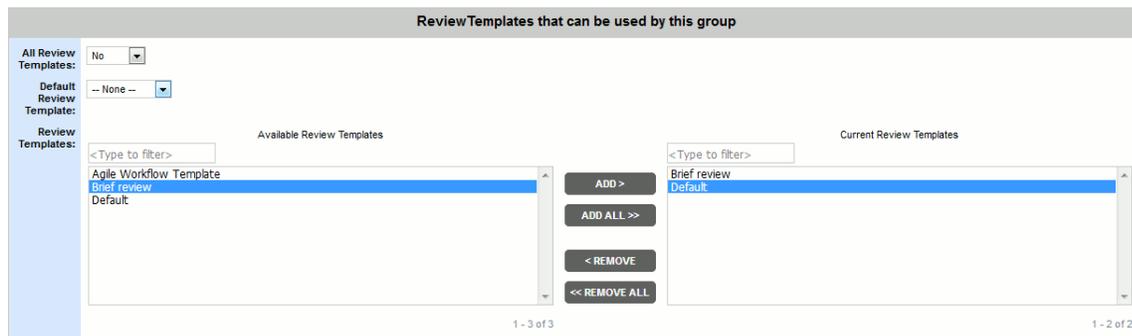
Group administrators are not allowed to directly edit the list of child groups of the group, also they cannot create top-level groups. If the "[Can Create Child Groups](#)^[217]" option is enabled for the respective user, group administrator can create new child groups of the group. The group administrator that has created a child group automatically becomes a group administrator of that child group.

You can add multiple groups to be children of the group. This may be helpful if a group is constituted by a number of sub-groups. The "group hierarchy" created by Group -> Child Group relationships is important for the [associate with review](#)^[213] and [access control](#)^[214] algorithms.



Groups can have specifically named member users, or they can automatically contain all users as members. Group membership is important for the [associate with review](#)^[213] and [access control](#)^[214] algorithms.

You can also configure which [review templates](#)^[230] can be used by this group. That is, specify which workflows, sets of roles, rules will become available to group members when creating reviews. To make all review templates available to the group, set the **All Review Templates** option to Yes. To define a specific list of templates that should be available to the group, set the **All Review Templates** option to No and move the desired templates to the Current Review Templates list. The Default Review Template setting specifies the initial template that will be chosen when creating review (if set to "None", the first template in the list will be chosen).



Besides, on this page you can create child groups of the selected group:

Create Child Group

Display Name:

CREATE CHILD GROUP

Review Pool Subscriptions

When the group could be selected as a [participant of a review](#)⁸⁶³¹ (that is when the Review Pool Participant setting is set to Yes), administrators can also set-up review pool subscriptions. Once a review of particular author is created, or a review contains some particular files, or a review uses some particular template, Collaborator will automatically add a group to this review as participant.

Author Subscriptions

Author-based subscriptions allow a group to be automatically included in reviews of particular authors.

Under the "Review Author" field, select the login name of the user to whose reviews a group would be subscribed. If no authors are selected for a given review, the subscription will use the name of the review creator instead - unless the review creator is flagged as a system admin.

Select the desired role type of group members (**Reviewer**, **Observer**, or **Moderator**) and specify how many participants with this role type to add to the review. Keep in mind that actual role names may vary depending on your [role configuration](#)²⁵⁵¹.

File Subscriptions

File pattern subscriptions allow a group to be automatically included in reviews where particular files are under a review.

Select an [Ant-style expression](#) as the pattern to match the file(s) of interest. The expression will be matched to the file path and repository name; it will not look for matches in the complete repository path with URL and other server descriptions. Ant-style expressions can include "*" to match any substring within a given directory, or "***" to match any substring of any length, ignoring directory separators. If possible, avoid beginning the pattern with wildcard characters as it can significantly decrease the performance of subscription processing.

Select the desired role type of group members (**Reviewer**, **Observer**, or **Moderator**) and specify how many participants with this role type to add to the the review. Keep in mind that actual role names may vary depending on your [role configuration](#)^[255].

Template Subscriptions

Template subscriptions allow a group to be automatically included in reviews that use particular templates.

Under the "Review Template" field, select the name of the template to which the group would be subscribed.

Select the desired role type of group members (**Reviewer**, **Observer**, or **Moderator**) and specify how many participants with this role type to add to the the review. Keep in mind that actual role names may vary depending on your [role configuration](#)^[255].

3.3.12.1 Syncing Groups and Their Members

Collaborator provides a simple web UI for creating and managing groups, but when groups are used to [represent organizational hierarchy](#)^[224] for large companies the web UI becomes unmanageable. Such groups are usually already stored in an external system such as LDAP or Active Directory, so Collaborator provides the ability to synchronize its users and groups with external system.

Collaborator offers two ways to perform synchronization: you can setup user and group mapping from the administrator's Web interface or run the special command of command-line client. Once established, user and group mapping operates constantly (upon every login), however it supports only [LDAP and Active Directory](#)^[106] systems. Synchronizing through command-line interface accepts group data in XML format and thus is suitable for any system. However it requires more efforts to create the input XML file and the command should be executed periodically to keep the data synchronized.

[Syncing Users and Groups via Web Interface](#)^[221]

[Syncing Users and Groups via Command-line Interface](#)^[222]

Syncing Users and Groups via Web Interface

You may configure user and group synchronization between Collaborator and the LDAP directory or Active Directory. In this case, Collaborator will retrieve user properties (name, phone, email, and so forth) and their membership in groups when the users login. Additionally, you can select whether to create new groups automatically and specify regular expression for automatic group creation.

In order to enable synchronization on Active Directory systems, you will need to open the [LDAP Settings](#)^[188] tab of General settings, enable the respective properties and possibly adjust the attribute mapping configuration.

LDAP/AD attribute mapping	
Enable LDAP mapping:	Yes <input type="checkbox"/> Do you want to enable LDAP mapping?
Display name:	{displayName} Mapping of your LDAP/AD scheme attributes to the Display name
First name:	{givenName} Mapping of your LDAP/AD scheme attributes to the First name
Last name:	{sn} Mapping of your LDAP/AD scheme attributes to the Last name
Phone:	{telephoneNumber} mobile: {mobile} Mapping of your LDAP/AD scheme attributes to the Phone
Department:	{company} {department} Mapping of your LDAP/AD scheme attributes to the Department
Email:	{mail} Mapping of your LDAP/AD scheme attributes to the Email
Enable LDAP groups synchronization:	Yes <input type="checkbox"/> Do you want to enable LDAP group synchronization?
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

In order to perform synchronization on LDAP systems, you will need to configure the above-mentioned [LDAP Settings](#)^[188] and also need to modify the ROOT.xml. Namely, you will need to add the following fields: the `connectionName` and `connectionPassword` fields which define a user account the Collaborator will use to connect to LDAP to find the group membership user records, and the `roleBase` and `roleSearch` fields which define the base entry for the role search and the search filter for selecting role entries.

```
<Realm className="org.apache.catalina.realm.JNDIRealm"
  connectionName="cn=read-only-admin,dc=example,dc=com"
```

```
connectionPassword="xxxx"
connectionURL="ldap://xxxx.com:389"
userPattern="uid={0},dc=example,dc=com"
roleBase="dc=example,dc=com"
roleSearch="(&(objectClass=groupOfUniqueNames)(uniqueMember={0}))"
allRolesMode="strictAuthOnly"
/>
```

Technical details

For mapping user membership in groups Collaborator uses the group's fully qualified domain name (FQDN) retrieved from the LDAP or AD. It checks if some of existing [user groups](#)^[212] has matching FQDN and adds the user to this group on success. Otherwise, it can create new group (if automatic group creation is enabled and group name matches filter) and adds the user to the new group.

To name the new group Collaborator uses the first entry of group's fully qualified domain name (FQDN). For example, a group having the "ou= ccusers,dc=example,dc=com" FQDN will have the ccusers title. If some other group already has the same title, Collaborator will append the ordinal number to the group title: ccusers1, ccusers2 and so on.

On every login Collaborator checks existing groups created via LDAP or Active Directory synchronization and actualizes user membership in those groups. Such algorithm allows to keep a consistency between Collaborator and LDAP or Active Directory.

Syncing Users and Groups via Command-line Interface

The `ccollab admin group sync` command takes as input an XML file describing all the groups being synced, their relationships, and their member users. The XML format is simple and a full schema is provided: [group-sync-xml.xsd](#) (opens in a new window). For an example see [Using Groups for Organizational Hierarchy](#)^[224]. The Collaborator administrator should write a script that queries the external system (that is, LDAP) and creates this XML. For an example of this script, see the Examples section of the `ccollab admin group sync` command.

The Collaborator administrator should run the sync script periodically. Collaborator will examine the group sync xml and make the appropriate changes in the system. Processing the sync is not very resource intensive, so you probably do not need to worry about load on the Collaborator server.

Adding Users

The group sync xml describes which users are admins and/or members of which groups. There are two options if the XML describes users who do not yet have accounts in Collaborator, controlled by the `--create-user` option of the `ccollab admin group sync` command:

- **Create the member-user** - If the `--create-user` option is specified, a user account is created for the user. Note the user does not [consume a license](#)^[87] until they log in.
- **Ignore the member-user** - If the `--create-user` option is not specified (default behavior), the member-user is ignored and a user account is not created. This is useful if you have a large organization but only a small subset of the employees are using Collaborator.

Removing Groups

Groups may be removed from the external system. There are two options if the XML no longer describes a group which was created in an earlier sync, controlled by the `--delete-groups` option of the `ccollab admin group sync` command:

- **Delete the group** - If the `--delete-groups` option is specified, the group is deleted. However if the group [can not be deleted because it has associated reviews](#)^[215], an error is returned and the sync is canceled.
- **Disable the group** - If the `--delete-groups` option is not specified (default behavior), the group is marked disabled. This always works, regardless of whether there are reviews associated with the group.

Renaming groups

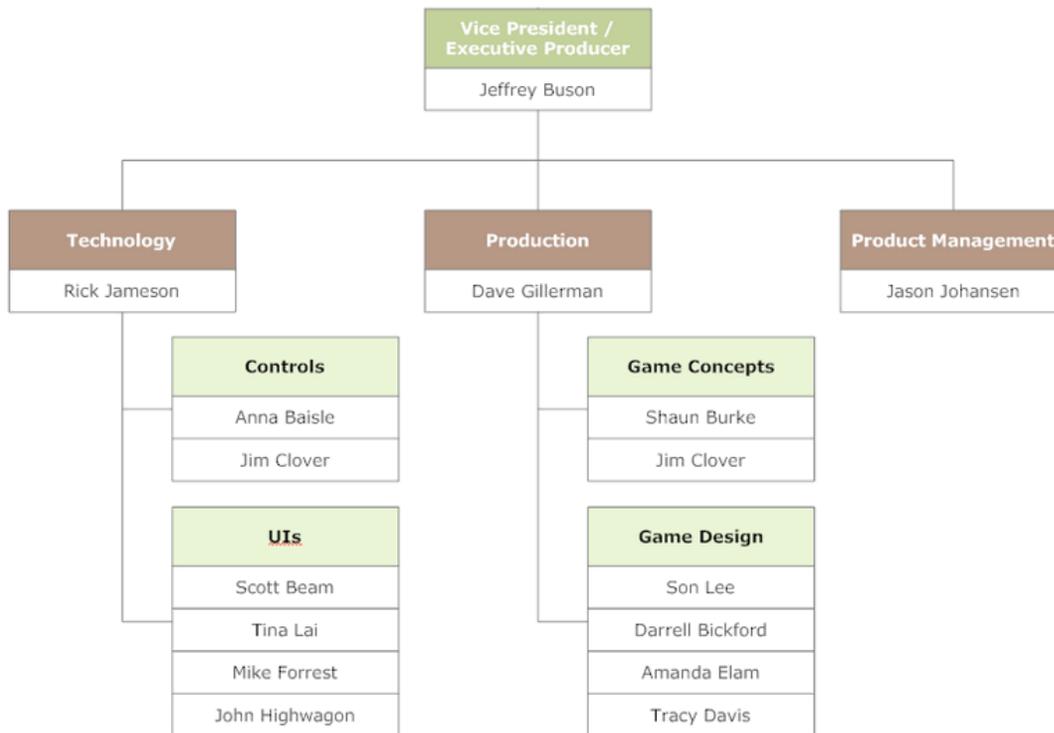
Groups are uniquely identified by a GUID which is specified in the group sync xml. To rename the group simply specify a group with the same GUID but a different title.

Groups that were created manually

Sometimes it is useful to sync groups with an external system but *also* manually specify some groups using the Web Client or the `ccollab admin group create` command. For an example see [Using Groups for Organizational Hierarchy and Projects](#)^[227]. Collaborator keeps track of which groups were created using sync and which groups were created manually. Manually created groups are not deleted or disabled on subsequent syncs just because they are not in the group XML. The web UI displays a warning when manually editing a group that was created by sync. Manually created groups can contain synced groups as children, but not vice-versa.

3.3.12.2 Using Groups for Organizational Hierarchy

The [Groups](#)^[212] feature is flexible enough to allow you to model any organization. As an example, suppose your company's **Action Games Division** org chart looked like this:



Companies this large typically store their org chart in an LDAP system. The Collaborator administrator can write a script that [synchronizes](#)^[220] Collaborator groups with the LDAP system.

For example, the XML to create the organizational structure shown above would look like this:

```

❏ Sample XML<groups>-<group guid="action-games-division" title="Action
Games Division" allow-associate-with-reviews="false"><member-group
guid="technology"/><member-group guid="production"/><member-group
guid="product-management"/><member-user
login="jbuson"/></group>-<group guid="technology" title="Technology"
allow-associate-with-reviews="false"><member-group
guid="controls"/><member-group guid="uis"/><member-user
login="rjameson"/></group>-<group guid="production"
title="Production" allow-associate-with-reviews="false"><member-group
guid="game-concepts"/><member-group guid="game-design"/><member-user
login="dgillerman"/></group>-<group guid="product-management"
title="Product Management"
allow-associate-with-reviews="false"><member-user
login="jjohansen"/></group>-<group guid="controls" title="Controls"
allow-associate-with-reviews="false"><member-user
login="abaisle"/><member-user login="jclover"/></group>-<group
guid="uis" title="UIs"
allow-associate-with-reviews="false"><member-user
login="sbeam"/><member-user login="tlai"/><member-user
login="mforrest"/><member-user login="jhighwagon"/></group>-<group
guid="game-concepts" title="Game Concepts"
allow-associate-with-reviews="false"><member-user
login="sburke"/><member-user login="jclover"/></group>-<group
guid="game-design" title="Game Design"
allow-associate-with-reviews="false"><member-user
login="slee"/><member-user login="dbickford"/><member-user
login="aelam"/><member-user login="tdavis"/></group></groups>

```

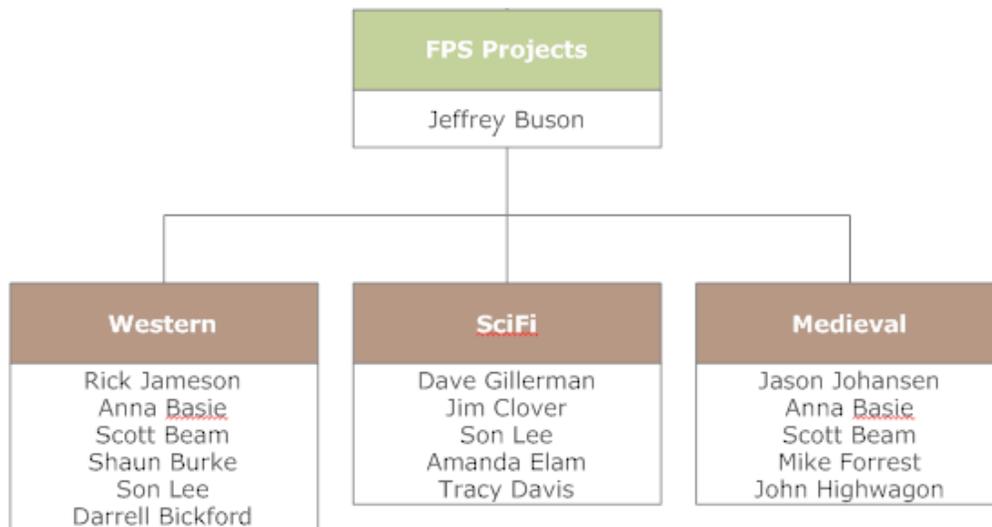
Note - we have assumed that user's logins are created by prefixing the first character from their first names to their last names. All of the groups have " Allow associate with Review^[217]" set to "No".

Reporting based on group membership

The reporting system can be used to create reports based on group membership. For example, all reviews where a member of a department was a participant, or all reviews created by a member of a department, and so on.

3.3.12.3 Using Groups for Projects

The Groups^[212] feature is flexible enough to allow you to model any structure. As an example, if you wanted to model a group of projects from a software gaming company:



Since there is only a few groups we create them manually using the web UI. First create a group called *FPS Projects*. The *FPS Projects* group would have only one user in it: Jeffrey Buson. It would also have three child groups: *Western*, *SciFi*, and *Medieval*. The *Western*, *SciFi*, and *Medieval* groups would each contain the users that are assigned to those projects.

Associating groups with reviews

We set "Allow associate with Review"^[217] to "Yes" for the *Western*, *SciFi*, and *Medieval* groups. In this example we are using groups to represent projects, so we configure the singular group label^[173] to "Project" and the plural group label^[173] to "Projects".

When a user in one of those groups creates a review it will be associated with a group. Most of the users are only members of one group, so when they create a review they do not have to manually choose a group - the review is automatically associated with their group. The users "Anna Basie" and "Scott Bean" are members of both the *Western* and *Medieval* groups, so when they create a review they are prompted to select one of those "Projects" to associate with the review.

Filtering the participant list

When a user creates a review they can choose to filter the participant list^[213] by that group. When Amanda Elam creates a review, if she selects "Filter possible participants by 'SciFi' Project" then the participant drop-downs will only contain Dave Gillerman, Jim Clover, Son Lee, and Tracy Davis. This is useful at large companies to make the list of users more manageable.

Restricting Access based on group

Access to reviews can be restricted based on associated group. The restriction can be set for all reviews or just for a particular review. For example, if a review was associated with the *Western* group and group access restriction was enabled, then it would be accessible to Scott Beam and Jeffrey Buson, but not accessible to Jason Johansen.

Reporting based on associated group

You can display, sort and filter reports by the associated group, so you know which project the review was for.

Finishing projects

When a project is finished, we mark it is group disabled. This means the group can no longer be associated with reviews, but it is still in the system for reporting purposes.

3.3.12.4 Using Groups for Organizational Hierarchy and Projects

The [Groups](#)^[212] feature is flexible enough to allow you to model any structure. You might want to use groups to represent an organizational hierarchy like the [Using Groups for Organizational Hierarchy](#)^[224] example *and* use groups to represent projects like the [Using Groups for Projects](#)^[225] example. This is supported and gives us all the advantages of both approaches.

Creating Groups

We create the groups to represent organizational hierarchy using the sync process as described in the [Using Groups for Organizational Hierarchy](#)^[224] example. We create the groups to represent the projects manually as described in the [Using Groups for Projects](#)^[225] example. Collaborator remembers which groups were created manually and which were created using sync, so the sync process does not delete the manually created project groups.

Assigning Group Members

Instead of manually naming each user that is a member of each project group like we did in the [Using Groups for Projects](#)^[225] example, we can indicate that all the members in an organizational hierarchy department are working on a project by making the organizational hierarchy group a child of the project group. This is much easier than assigning individual user members, but we lose some fine-grained control.

Associating groups with Reviews

All of the organizational hierarchy groups have the "[Allow associate with review](#)^[217]" option set to "No". The *Western*, *SciFi*, and *Medieval* project groups have the "[Allow associate with Review](#)^[217]" option set to "Yes". We configure the [singular group label](#)^[173] to "Project" and the [plural group label](#)^[173] to "Projects".

When a user creates a review it will be associated with a project group. If the user's organizational hierarchy group is only a member of one project group then when they create a review they do not have to manually choose a group - the review is automatically associated with the project group. If a user's organizational hierarchy group is a member of more than one project group then when they create a review they are prompted to select one of those "Projects" to associate with the review.

Filtering the participant list

When a user creates a review they can choose to [filter the participant list](#)^[213] by that group. This lets a user filter the list of participants by only the users working on the project associated with the review. This is useful at large companies to make the list of users more manageable.

Restricting Access based on group

Access to reviews can be restricted based on associated group. The restriction can be set for all reviews or just for a particular review. For example, if a review was associated with the *Western* group and group access restriction was enabled, then only users working on the *Western* project would be able to access it.

Reporting based on group membership

The reporting system can be used to create reports based on group membership. For example, all reviews where a member of a department was a participant, or all reviews created by a member of a department, and so on.

Reporting based on associated group

You can also display, sort and filter reports by the associated group, so you know which project the review was for.

Finishing projects

When a project is finished, we mark its group disabled. This means the group can no longer be associated with reviews, but it is still in the system for reporting purposes.

3.3.12.5 Using Groups for Review Pools

Groups for Review Pools

Review Pools are Groups that can be selected as [participants in a Review](#)^[863]. To enable Review Pools, a Collaborator administrator must define specific Groups to be selectable for Review Pools. You can configure Groups for Review Pools specifically for use as Review Pools, or select Review Pools from an existing group hierarchy.

Using Groups for Review Pools without a Group Hierarchy

As a Collaborator administrator, if you do not already use a group hierarchy, or if it does not make sense to use it for Review Pools, then you should create Groups only for use by Review Pools. Create one or more Groups containing the users who are candidate participants. For each Group to be used as a Review Pool without a group hierarchy, enable **Review Pool Participant** and disable **Associate With Reviews**. Shown below is an example where several Groups have been created specifically for use as Review Pools.

Group List						
	Title	Reviews	Associate with Reviews	Review Pool Participant	Disabled	Description
[Edit] [Delete]	 Developers - Core	0	No	Yes	No	
[Edit] [Delete]	 Developers - UI	0	No	Yes	No	
[Edit] [Delete]	 Documentation Reviewers	0	No	Yes	No	

Using Groups for Review Pools with Group Hierarchy

As a Collaborator administrator, if you have a group hierarchy already defined for your organization, you may designate any existing Groups to also be used for Review Pools. For each group to additionally be used for Review Pools, enable **Review Pool Participant** and leave **Associate with Reviews** enabled. Shown below is an example organization where the leaf groups have been enabled for use as Review Pools.

Group List						
	Title	Reviews	Associate with Reviews	Review Pool Participant	Disabled	Description
[Edit] [Delete]	 WYSIWIG	0	Yes	No	No	WYSIWIG organization
[Edit] [Delete]	 Dev	0	Yes	No	No	WYSIWIG development
[Edit] [Delete]	 Core	0	Yes	Yes	No	
[Edit] [Delete]	 UI	0	Yes	Yes	No	
[Edit] [Delete]	 Pubs	0	Yes	No	No	WYSIWIG documentation team
[Edit] [Delete]	 In-product manual	0	Yes	Yes	No	
[Edit] [Delete]	 Website Documentation	0	Yes	Yes	No	
[Edit] [Delete]	 QA	0	Yes	Yes	No	WYSIWIG test team

3.3.13 Review Templates

A "Review Template," or a "Review Workflow," is a particular set of roles, custom fields, and other options that determine the behavior and rules of a review.

Note: This feature is only supported in Collaborator Team and Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see [the comparison page](#)³

Small installations might have only one template. Some installations will want a template for "quick" reviews (self-checks during active development of new features), another for "standard" (one author, one reviewer, suitable for most reviews), and another for "very strict" (reviews of a stable branch, core module, stable files or particularly difficult piece of code). Still others might require different templates in different development groups all using a single server.

The Review Templates section in the Admin screen allows an administrator to configure these templates.

Enabled Review Templates
Disabled Review Templates

Review Template Configuration

This wizard allows you to configure templates that control the workflow rules and custom fields for reviews. When only a single template is available (i.e., the default template), users will not be shown the template selection box when creating reviews. Furthermore, when there is only one template, all changes to the Review and Defect Custom fields are immediately reflected in the template, without the need to edit the template. New fields are automatically added to the template.

Once an additional template has been created, users will need to choose the template each time the review is created. It is important to specify descriptive names and appropriate descriptions, so users will not be confused what template to choose. Also, with the addition of a user-specified template, the rules for custom fields also change. In this case, new fields will not be added to any template without specific administrator action.

Disabled templates will not be available for selection at review creation time, but they do count as a template when considering the custom field rules described above.

Review Templates

New Template

Name	Description	
Default	The default template.	[Edit] [Disable]
Agile Workflow Template		[Edit] [Disable]

Template Management

The default configuration is to have only a single active template, and this is adequate for many smaller installations and trials. When there is exactly one template, the user is not prompted to select a template when he creates a review³¹⁰; the one template is automatically selected. If additional templates are added later, the template that was the singleton is still applied to those existing and completed reviews.

You cannot have fewer than one active template. The user interface will not allow you to disable the last template in your system; users need *something* to control the rules of the review.

You also cannot delete templates. Old templates are needed for existing and completed reviews that depended on that template. You can, however, mark templates as "disabled," in which case they appear only in the administrative interface but never when creating a new review. Existing reviews with that template continue to their completion so as to not disrupt their progress:

Enabled Review Templates
Disabled Review Templates

Review Template Configuration

This wizard allows you to configure templates that control the workflow rules and custom fields for reviews. When only a single template is available (i.e., the default template), users will not be shown the template selection box when creating reviews. Furthermore, when there is only one template, all changes to the Review and Defect Custom fields are immediately reflected in the template, without the need to edit the template. New fields are automatically added to the template.

Once an additional template has been created, users will need to choose the template each time the review is created. It is important to specify descriptive names and appropriate descriptions, so users will not be confused what template to choose. Also, with the addition of a user-specified template, the rules for custom fields also change. In this case, new fields will not be added to any template without specific administrator action.

Disabled templates will not be available for selection at review creation time, but they do count as a template when considering the custom field rules described above.

Review Templates

Name	Description	
Brief review		[Enable]

Here "Brief review" has been disabled.

Editing Templates

Default

General Settings

Name:

Description:

SAVE
REVERT

Every template has a Name and Description. Both of these are shown to the user for reference.

Review Reject Reasons

Review Reject Reasons:

SAVE
REVERT

Checklists

Checklist:

Checklist Mandatory?:

SAVE
REVERT

For each template you can specify whether it will prompt for [review reject reasons](#)³¹⁸, or display some of the predefined [checklists](#)²⁵⁰.

Review Custom Fields	
Overview:	Yes <input type="button" value="v"/>
Steps to reproduce:	No <input type="button" value="v"/>
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	
Participant Custom Fields	
Rating:	No <input type="button" value="v"/>
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	
Defect Custom Fields	
Severity:	Yes <input type="button" value="v"/>
Type:	Yes <input type="button" value="v"/>
Product Version Area:	No <input type="button" value="v"/>
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Each template can include an arbitrary set of [custom review, participant and defect fields](#) ^[235]. The master list of all possible custom fields is set up separately; here you can configure which of those fields to display to the user during this template. This makes it possible to have templates with various field requirements, but where the same field *can* be reused across templates, the database and user interface will make that plain.

Roles	
Roles:	Standard <input type="button" value="v"/>
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Each template also specifies a single [role configuration](#) ^[253] to use for that review.

Automatic Links	
Fogbugz link pattern:	Enabled <input type="button" value="v"/>
Bugzilla link pattern:	Enabled <input type="button" value="v"/>
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

In the Automatic Links section you can define what text fragments should be recognized as [automatic links](#) ^[260].

Remote System Links			
Enabled:	Yes ▾		
	Automatically Add Remote System Links	Automatically Create New Work Item for External Defects	Default Project
ACME JIRA:	Enabled ▾	Enabled ▾	COLLAB ▾
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>			

The Remote System Links section specifies whether to display the Remote System Links section of the Review Summary page. Besides, it lists the available [issue-tracking system integrations](#)^[778] and allows selecting which integration features will be accessible to this template.

The "Automatically Add Remote System Links" column defines what text fragments should be recognized as links to remote systems and thus, be appended to the review's [Remote System Links](#)^[323] section.

The "Automatically Create New Work Item for External Defects" column allows to select an issue-tracking system where to export external defects. The "Default Project" column specifies which project will be pre-selected in the dialog that suggests creating a ticket/work item.

Changing the Template being used in a review

What happens when a review changes its template, or when a template definition changes when a review is already in progress or complete?

A review can only change template during the Planning phase. This means once the review is under way, the template is fixed. This makes sense -- it would be hard to change, for example, the [role configuration](#)^[253] when participants are already invited and performing their respective tasks! During the planning phase the wizard interface prevents the user from making incorrect moves.

Existing values of custom fields will be retained upon changing review template if the custom field exists in both templates.

Editing a template that is in use

If you edit a template that is currently in use by a review, the template will be set to disabled but it will continue to be used by the open review. A new template with the same name containing your changes will be automatically created. The newly created template will be used by all reviews created/edited after this change. Editing a template will not re-open old reviews.

3.3.14 Custom Fields

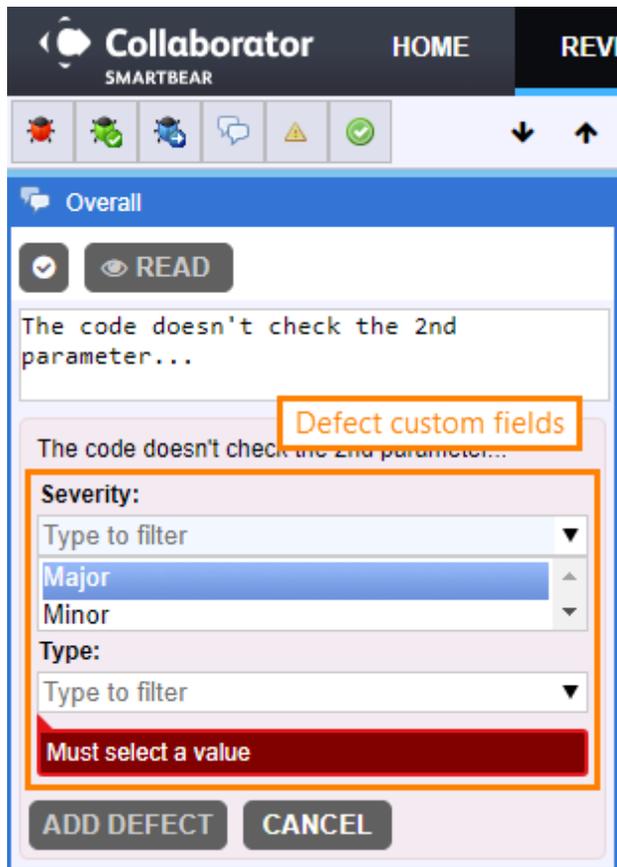
About

Custom fields allow adding arbitrary information fields to reviews. They help to fit Collaborator reviews into your workflow. Currently Collaborator supports custom fields for the following areas: reviews, defects, checklists and participants.

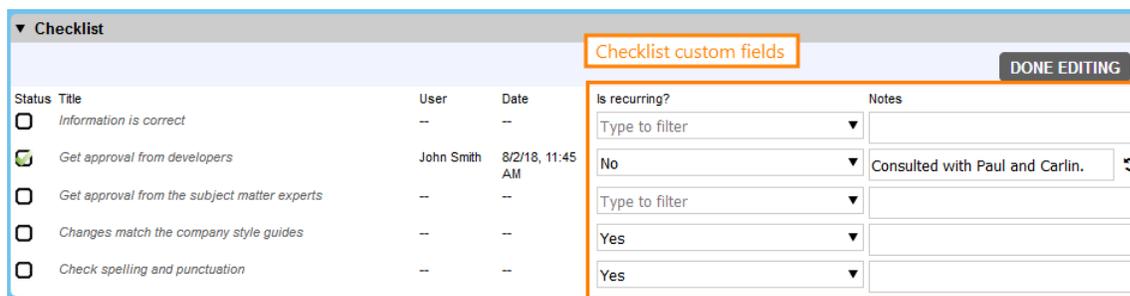
Review custom fields allow to specify and view any additional information for the general section of the review.

The screenshot displays the 'Review #22: Check changes in Calendar controls (see ticket AB-132)' interface. At the top, there are navigation tabs: SUMMARY, PARTICIPANTS, LINKS, DEFECTS, CHAT, MATERIALS. Below these is a progress bar with stages: PLANNING (active), ANNOTATION, INSPECTION, REWORK, and COMPLETED. The review title is 'Check changes in Calendar controls (see ticket AB-132)'. A blue banner states 'YOU ARE NOT A PARTICIPANT IN THIS REVIEW.' The current stage is 'PLANNING'. Statistics show: 0 Participants, 2 Chats, 1 Files, and 1 Defects. A 'DONE EDITING' button is present. The form fields include: Review Title (text), Role (not participating), Created (on 2018-07-04 at 16:42 by AlexeyK), Group (Developers - Core), Template (Doc review), Deadline (2018-07-18), Completed On (N/A), Restrict Access (Anyone), and Restrict Uploads/Deletions (checkbox). A 'Review custom fields' button is highlighted with an orange box. The Overview section is empty, and the Product area is set to Overall.

Defect custom fields allow to specify and view any arbitrary information for defects.



Checklist custom fields allow to specify and view any arbitrary information for checklist items.



Participant custom fields allow each review participant to specify and view any arbitrary information about the review:

Although these fields show up in different places in the user interface, the administrative interface for configuring these fields is identical. Administrators create and edit custom fields of all these types in the **Review Templates > Custom Fields** settings. See below for details.

Custom field values are included in the [search](#)^[398] and in [reports](#)^[407].

Requirements

- Custom fields are not supported in Collaborator Community. Collaborator Team offers limited support for custom fields, and Collaborator Enterprise fully supports them. For a complete list of differences between Collaborator editions, see Collaborator Editions.
- To create and edit checklists, you need administrator permissions in Collaborator.

Custom field types

Collaborator supports the following types of the custom fields:

String (single-line)

These are text fields displayed as usual text boxes. Can store up to 255 characters. Supports various validation options. Can be used for creating date/time edit boxes and other controls.

String (multi-line)

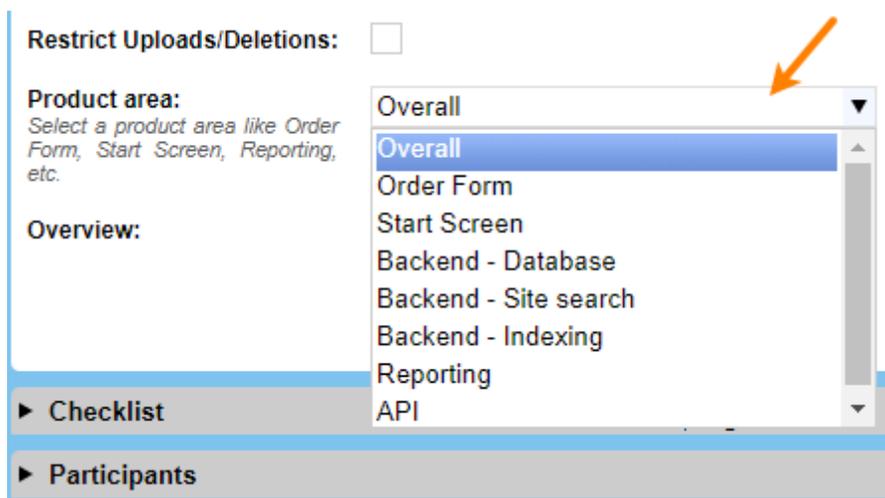
Fields that support long texts. Displayed as multi-line edit boxes with vertical and horizontal scrollbars (if needed).



The maximum allowed text size depends on the database server, where Collaborator is installed. The lower bound is 8192 characters. It can be more and reach up to several thousands of characters.

Drop-down list

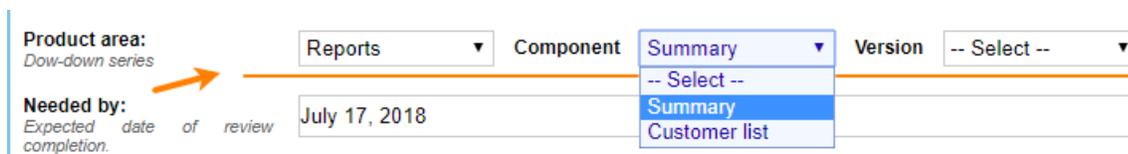
Fields that let users select one item from a pre-defined list of items. Displayed as combo boxes:



These fields support the search-as-you-type functionality: when users are typing, Collaborator shows only those items in the drop-down list that contain the entered text.

Drop-down series

Fields that let users select items from several pre-defined lists of items, where the item selected in first list determined which items will be available in the second list and so on. Displayed as a sequence of combo boxes:



To create a field of this type:

1. In the **Title** property, you specify the names of combo boxes separated by vertical pipe characters ("|"):

```
Product Area|Component|Version
```

2. In the **Selectable Items** property, you specify items of these combo boxes. Each line in the Selectable Items list contains the values separated by vertical pipe characters ("|"). The number of these values should match the number of values in the Title property:

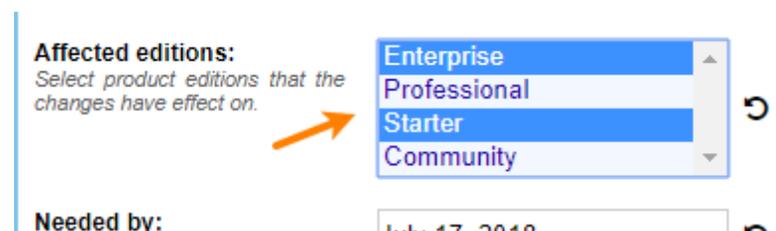
```
Reports|Summary|0.0.1
Reports|Summary|0.0.2
Reports|Customer list|Alice var
Reports|Customer list|John var
Login screen|Controls|0.0.1a
Login screen|Controls|BS
```

When you select an item in the first combo box, Collaborator automatically filters the items of the second combo box keeping only those that are match the selection. When you select a value in the second combo box, the third combo boxes will have only items that match the selection, and so on.

When creating reports, the field values you specify in filters should include pipe characters, for example, "Login screen|Controls|0.0.1a".

Multi-select list

These fields are displayed as list boxes that support multiple choices:

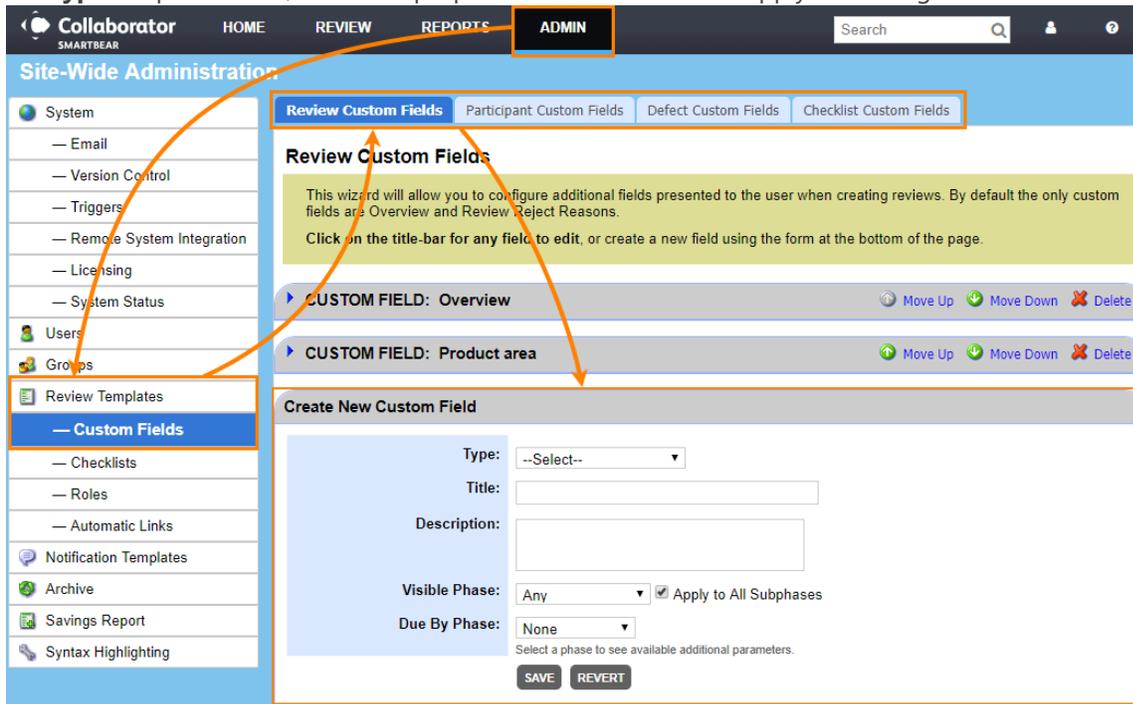


Use Ctrl+click or Shift+click for multi-selection.

Create a custom field

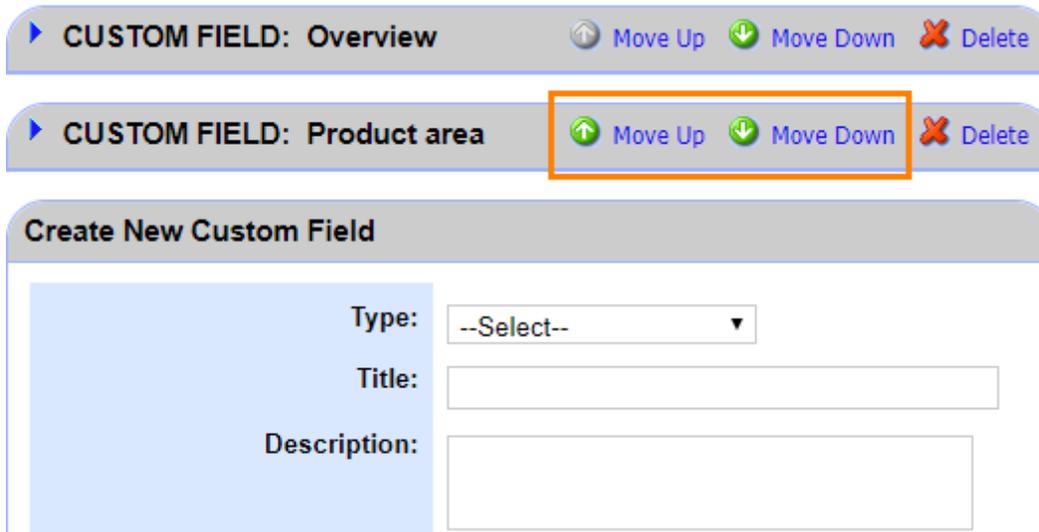
1. Log in to Collaborator as an administrator.
2. Go to **ADMIN > Review Templates > Custom Fields**. This page displays existing custom fields.
3. Switch to the tab that matches the type of the field you are going to create.

- Find the Create new Custom Field section at the bottom of the tab, select the field type from the **Type** drop-down list, set other properties and click **Save** to apply the changes:



Important: The field type you set when creating a custom field cannot be changed later.

- Use the **Move Up** and **Move Down** buttons to position the new field among other custom fields:



- After you changed the parameters, you need to enable the custom fields in a review template (for review, defect and participant custom fields) or in a checklist (for checklist custom fields). See below.

Enable custom fields in review templates

To use review, defect or participant custom fields in reviews, you need to add them to review templates you use. After doing this, custom fields will be available in new reviews based on these templates.

To add a field to a template:

1. Go to **ADMIN > Review Templates**. On the **Enabled Review Templates** tab, find the desired template and click **Edit**:

The screenshot shows the 'Collaborator SMARTBEAR' admin interface. The top navigation bar includes 'HOME', 'REVIEW', 'REPORTS', and 'ADMIN' (which is highlighted). Below the navigation is a search bar and user profile icons. The main content area is titled 'Site-Wide Administration' and has a left sidebar with various system settings. 'Review Templates' is selected in the sidebar. The main area shows the 'Enabled Review Templates' tab, a 'Review Template Configuration' wizard with instructions, and a table of review templates. The table has columns for 'Name', 'Description', and actions. The 'Website page review' row has its 'Edit' link highlighted with an orange box, and an orange arrow points from this link to the 'Review Template Configuration' section.

Name	Description	
Default	The default template.	[Edit][Disable]
Website page review		[Edit][Disable]
Source-code review		[Edit][Disable]
Doc review	A sample template just to test this feature.	[Edit][Disable]

2. Scroll the template settings screen down to the **Review Custom Fields, Participant Custom Fields** or **Defect Custom Fields** section, and then select the desired custom fields to be available in templates:

The screenshot shows the 'Review Custom Fields' configuration section. It has a grey header. Below the header are three dropdown menus: 'Overview:' set to 'No', 'Product area:' set to 'Yes' (highlighted with an orange arrow), and 'Affected editions:' set to 'Yes'. Below the dropdowns are 'SAVE' and 'REVERT' buttons.

3. Click **Save** to apply the changes, or click **Revert** to cancel them.

After you modified a template, Collaborator does not update all the reviews based on this template. It keeps existing reviews unchanged, and marks the template as disabled in them. It will apply the changes to new reviews that are the template.

To use custom fields in existing reviews, you need to re-apply the template to these reviews. See [Review Templates](#) ^[230].

Enable custom fields in checklists

To use checklist custom fields in reviews, you need to add them to the checklists you use. After doing this, custom fields will be available in new reviews that use the desired checklists.

To add a field to a checklist:

4. Go to **ADMIN > Review Templates > Checklists**. Find the desired checklist, if the checklist is active, then disable it, and then click **Edit**:

The screenshot shows the Collaborator Admin interface. The top navigation bar includes 'HOME', 'REVIEW', 'REPORTS', and 'ADMIN' (which is highlighted). Below the navigation bar is the 'Site-Wide Administration' section with a sidebar menu containing 'System', 'Users', 'Groups', 'Review Templates', and 'Checklists' (which is highlighted). The main content area is titled 'Checklist Configuration' and contains a table of checklists. The table has columns for 'Name', 'Description', and actions. The 'Quick Check-up List' row has 'Edit' and 'Enable' buttons highlighted with orange boxes. An orange arrow points from the 'Checklists' menu item to the 'Edit' button.

Name	Description	
DocActions Checklist	Actions to apply to reviewed documentation pages.	[Edit][Disable]
Source-code checklist		[Edit][Disable]
Quick Check-up List 2		[Edit][Disable]
Checklist 3		[Edit][Enable]
Quick Check-up List		[Edit] Enable

5. Scroll the checklist settings screen down to the **Checklist Custom Fields** section, and then select the desired custom fields to be available in the checklist:

Checklist Custom Fields

Is recurring?: Yes

Notes: No

6. Click **Save** to apply the changes, or click **Revert** to cancel them.

Change the order of custom fields

In the Custom Fields page, switch to the tab that matches the type of your custom field, and use the **Move Up** and **Move Down** buttons of the field to change its position:

▶ CUSTOM FIELD: Overview ⬆ Move Up ⬇ Move Down ✖ Delete

▶ CUSTOM FIELD: Product area ⬆ Move Up ⬇ Move Down ✖ Delete

Create New Custom Field

Type:	<input type="button" value="--Select--"/>
Title:	<input type="text"/>
Description:	<input type="text"/>

There is no need to update review templates after this. The changes will be applied automatically.

Delete a custom field

In the Custom Fields page, switch to the tab that matches the type of your custom field, and click **Delete** for the field:

▶ **CUSTOM FIELD: Overview** ⬆ Move Up ⬇ Move Down ✖ Delete

▼ **CUSTOM FIELD: Product area** ⬆ Move Up ⬇ Move Down ✖ Delete

ID: 215
Type: Drop-down List
Title:

There is no need to update review templates. Collaborator will remove the field from them automatically. Also, it will remove the field from all the reviews that use that field. The field values in these reviews will be lost.

Custom field properties

Common

Property	Description
Type	The type of the custom field. See above ^[237] .
Title	<p>The name of the custom field, as it will be displayed to users.</p> <p>Notes:</p> <ul style="list-style-type: none"> To avoid user confusion, select descriptive names. Avoid using the names that are similar to some other existing field names. For custom fields of the drop-down series^[237] type the Title property contains substrings separated by vertical pipe characters (" "). If you host Collaborator on an Oracle server, note that custom field names which differ only by double-quote characters ("") may break Oracle reporting views. See also Known Issues^[873].
Description	Text of the tip that is shown below the field name in the UI.
Visible Phase	<p>Specifies review phases^[17], on what the field will be visible for users. To make the field visible from some phase, select that phase from the drop-down list and then select the Apply to All Subphases check box.</p> <p>Tip: Never Visible means the field will not be displayed on any phase. These fields are useful for storing values provided by scripts and triggers.</p>

	For information on using participant custom fields on the Planning, Inspection and Completed phases, see below.																
Apply to All Subphases	See above.																
Due By Phase	<p>Specifies the review phase on which the field must be populated. The possible values include:</p> <table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><i>None</i></td> <td>The field is not required on any phase and may remain blank.</td> </tr> <tr> <td><i>Planning</i></td> <td>The field must be populated on the Planning phase.</td> </tr> <tr> <td><i>Annotating</i></td> <td>The field must be filled-in on the Annotating phase. Since that phase is optional, the field may remain blank, if a review has never been in that phase.</td> </tr> <tr> <td><i>Rework</i></td> <td>The field must be filled-in on the Rework phase. Since that phase is optional, the field may remain blank if a review has never been in that phase.</td> </tr> <tr> <td><i>Inspection</i></td> <td>The field must be populated on the Inspection phase, no matter whether a review goes then to the Rework or to the Completed phase.</td> </tr> <tr> <td><i>Completed</i></td> <td>The field must be filled-in on the Inspection phase only if a review goes to the Completed phase. If a review goes to the Rework phase, the field may remain blank.</td> </tr> <tr> <td><i>Any</i></td> <td>The field must be populated when a review is moving from any phase to any other phase.</td> </tr> </tbody> </table> <p>To avoid situations when a required field becomes invisible, make sure that —</p> <ul style="list-style-type: none"> • Visible Phase is the same phase as Due by Phase, — or — • Visible Phase is an earlier phase relative to Due by Phase, and Apply to All Subphases is selected. <p>If Due by Phase is Completed, Visible Phase must be some earlier phase.</p>	Value	Description	<i>None</i>	The field is not required on any phase and may remain blank.	<i>Planning</i>	The field must be populated on the Planning phase.	<i>Annotating</i>	The field must be filled-in on the Annotating phase. Since that phase is optional, the field may remain blank, if a review has never been in that phase.	<i>Rework</i>	The field must be filled-in on the Rework phase. Since that phase is optional, the field may remain blank if a review has never been in that phase.	<i>Inspection</i>	The field must be populated on the Inspection phase, no matter whether a review goes then to the Rework or to the Completed phase.	<i>Completed</i>	The field must be filled-in on the Inspection phase only if a review goes to the Completed phase. If a review goes to the Rework phase, the field may remain blank.	<i>Any</i>	The field must be populated when a review is moving from any phase to any other phase.
Value	Description																
<i>None</i>	The field is not required on any phase and may remain blank.																
<i>Planning</i>	The field must be populated on the Planning phase.																
<i>Annotating</i>	The field must be filled-in on the Annotating phase. Since that phase is optional, the field may remain blank, if a review has never been in that phase.																
<i>Rework</i>	The field must be filled-in on the Rework phase. Since that phase is optional, the field may remain blank if a review has never been in that phase.																
<i>Inspection</i>	The field must be populated on the Inspection phase, no matter whether a review goes then to the Rework or to the Completed phase.																
<i>Completed</i>	The field must be filled-in on the Inspection phase only if a review goes to the Completed phase. If a review goes to the Rework phase, the field may remain blank.																
<i>Any</i>	The field must be populated when a review is moving from any phase to any other phase.																

	Required custom fields of the participant type are only required for participants that are expected to change the review on some phase: for example, on the Planning phase these are authors, on the Annotating phase – all participants, on the Inspection phase – reviewers, and so on.
Allowed to Modify	Available for the participant custom fields only. Defines who can modify the field value: the participant who is supposed to do this, any participant, moderator and so on. Default is Assigned participant.

Other properties are specific to the field type (see below)

Single-line text

Property	Description
Minimum Length	Minimal allowed length of the text in the field. To let users have empty values in a field, set this property to 0.
Maximum Length	Maximum number of characters a field can contain. The maximum allowed value here is 255. The default value is also 255.
Validator	A <u>Java-style regular expression</u> that will be used to validate the contents of a field. The field value should match the specified regular expression.

Multi-line text

Property	Description
Minimum Length	Minimal allowed length of the text in the field. To let users have empty values in a field, set this property to 0.
Maximum Length	Maximum allowed number of characters in the field. This value depends on the database server, where Collaborator is installed. In many cases, the lower possible bound is 8192, but it can be higher and can reach thousands of characters.

Drop-down List

Property	Description
----------	-------------

Selectable Items	The list of items to be displayed in the drop-down list.
Display Ordering	The order of items in the list: ascending, descending, or none (which means the items will be displayed in the order of appearance in the Selectable Items list).
Default Value	The value that the field will have by default. Should match one of the items in the Selectable Items list.

Drop-down Series

Property	Description
Selectable Items	<p>The list of items of the of the drop-down lists.</p> <p>Each item in the list includes substrings separated by vertical pipe characters (“ ”). The substrings correspond to items of different combo boxes in the “drop-down series” field. For example:</p> <pre>DesktopClient New controls ver. A DesktopClient New controls ver. B WebClient Controls 0.3a WebClient Controls 0.4 WebClient Wizards Create</pre> <p>Items in the list must have the same number of substrings, and this number should match the number of substring in the Title property.</p>
Display Ordering	The order of items in the list: ascending, descending, or none (which means the items will be displayed in the order of their appearance in Selectable Items).

Multi-select List

Property	Description
Selectable Items	The list of items to be displayed in the drop-down list.
Display Ordering	The order of items in the list: ascending, descending, or none (which means the items will be displayed in the order of appearance in the Selectable Items list).

Notes

Predefined custom fields

Some custom fields are available out-of-box:

- Overview (review custom field)
- Severity (defect custom field)
- Type (defect custom field)

Collaborator does not impose any limitations on these fields. You can edit their properties as if they were created by you.

Custom fields with date and time values

Collaborator does not offer special fields for date and time values. To store these values, you can use custom fields of the String (single-line) type and use the following regular expressions to validate user input:

- For dates, you can use a regular expression like this:

```
(?:19|20)\d\d-(?:0[1-9]|1[012])-(?:0[1-9]|[12][0-9]|3[01])
```

It lets users enter a date in the 20th or 21st century, and yes, it accepts 31 days each month.

- For time values, you can use the following regular expression:

```
(?:[01][0-9]|2[0-3]):[0-5][0-9]
```

It validates time values against a 24-hour format.

You can combine these two regular expressions to accept both date and time in the same field.

Set the field description to inform users about the expected format, so that users they do not have to parse regular expressions to know what to enter.

Changing custom field values

Custom fields are used in reviews. Changing field properties might cause reviews to contain invalid data. To prevent this, Collaborator follows these rules:

- Collaborator does not include new custom fields in reviews automatically. First, you need to add them to review templates. This operation disables the existing review template and creates a new template in place of it. So, the changes will be visible in new reviews that are based on the updated template.

If you want the changes to be applied to existing reviews, you will have to reapply the new template to them. Existing values of custom fields will be retained upon changing review template if the custom field exists in both templates. The new fields will contain default values, or will show a dash or N/A to indicate that the value was not given.

- If you change properties of a field that is already present in a template, then —
 - If the change you made does not affect field values (for example, you renamed a field or changed its description), then users will see the changes next time they open the review in the review screen.
 - If the changes made existing values invalid (for instance, you decreased the maximum length, changed the validating regular expression or removed some items from a drop-down list), the existing field values will remain unchanged. However, users will have to specify new valid values when they are editing a review.
- Custom fields that you delete in ADMIN settings will be removed from the UI automatically. Now update of review templates is needed.

Custom fields in external reporting systems

To make custom fields available for external reporting systems like Excel, Access, Crystal Reports, or Business Objects, Collaborator offers two view objects: reviewcustom and defectcustom.

The reviewcustom view does not includes custom fields of the Multi-select list type.

If a review does not use some custom fields (these fields are disabled in the corresponding review template), then these fields have the NULL value in reports for these reviews.

We recommend to refer to custom fields in reports by their names rather than by their order.

Why are my custom fields absent from reviews?

New custom fields are not added to reviews automatically. You need to add them to review templates you are using.

Note that this will disable the review template and will create a new template in place of it. Your new custom fields will be visible in new reviews based on the updated template, and will not be visible in existing reviews. If you want the see the new field in an existing review, you will have to reapply the new template to that review.

Using participant custom fields

- Participant custom fields cannot be visible only in the Planning phase. Otherwise, participants will not be able to specify field values.
- If a required participant custom field is visible only on the Inspection phase, users cannot “finish” this phase without specifying their values for the fields.
- Users are allowed to edit participant custom fields when the review is in the Completed phase without reopening the review. This gives them a possibility to answer post-review survey questions.
- Follow these links to get examples of reporting on participant custom fields:
 - [Example SQL: Participant Custom Fields](#) ⁸¹⁶
 - [Example XPath and XSL](#) ⁸²²

3.3.15 Checklists

About checklists

Checklists are user-defined “to-do” lists that you can apply to reviews. You can use them to remind review participants to perform certain actions before the review can be completed:

Review #22: Untitled Review

YOU ARE NOT A PARTICIPANT IN THIS REVIEW. **PLANNING** 0 Participants 0 Files 1 Chats 0 Defects **DONE EDITING**

Review Title: Untitled Review
 Role: (not participating)
 Created: on 2018-07-04 at 16:42 by AlexK
 Group: Developers - Core
 Template: Doc review
 Deadline: 2018-07-18
 Completed On: N/A
 Restrict Access: Anyone
 Restrict Uploads/Deletions:
 Product area: Overall

Status	Title	User	Date
<input checked="" type="checkbox"/>	Changes match the company style guides	AlexK	7/4/18, 7:20 PM
<input checked="" type="checkbox"/>	Check spelling and punctuation	AlexK	7/4/18, 7:20 PM
<input type="checkbox"/>	Get approval from developers	--	--
<input type="checkbox"/>	Get approval from the subject matter experts	--	--
<input type="checkbox"/>	Information is correct	--	--

Participants

Add Myself As:
 Modérateur
 Auteur

Filler by: Developers - Core

Add a New Participant: Participant: Type to filter **DONE EDITING**

Recent Participants: You have not assigned anyone in the 'Developers - Core' Group to

To specify which checklist should be used for this or that review, modify the [review template](#)^[230]. You can use different checklists for different review templates.

Collaborator logs all user activities on the checklist. When a review participant select a check box in the list, Collaborator logs the participant's user name and the timestamp of the change. Also, it adds a message to the Chat section of the review. If a review participant clears some check box in the list, Collaborator also adds a message about this to the Chat section.

For auditing purposes, you can include checklist status changes into the [Review Details Report](#)^[412]. Make sure that **Checklist History** is set to *Display Checklist History* for this.

Requirements

- Checklists are available in Collaborator Team and Collaborator Enterprise. For a complete list of differences between Collaborator editions, see [Collaborator Editions](#)^[3].
- To create and edit checklists, you need administrator permissions in Collaborator.

Configure Checklists

You can configure checklists and the items that they include from the Checklist wizard on the Admin page:

Checklist Configuration

This wizard allows you to configure checklists and the items that they contain. You can then select to use an enabled checklist when creating or editing a review template. You can only apply one checklist at a time to a review template. To add more items, simply click 'Add' located at the bottom of the Checklist Items section and more inputs will be shown.

Checklists
 [New Checklist](#)

Name	Description	
 DocActions Checklist	Actions to apply to reviewed documentation pages.	[Edit] [Disable]
 My checklist		[Edit] [Disable]
 Quick Check-up List		[Edit] [Enable]

You can make a new checklist, edit a checklist, or disable a checklist. After a checklist has been disabled, you can enable it.

Specify the checklist name and arbitrary description. Checklist names must be unique.

If you have created any [checklist custom fields](#)^[235], specify which of them should be displayed for this checklist.

Quick Check-up List

General Settings

Name:

Description:

Checklist Custom Fields

Is recurring?:

Notes:

Checklist Items

To add more items, simply click 'Add' and you will be presented with additional inputs to add more items.

Item 1:

Item 2:

Item 3:

Item 4:

Item 5:

Item 6:

Enter the list items in the **Item nn** edit boxes. Checklist items must be unique within a checklist. By default, Collaborator has edit boxes for 10 items. If you need more, simply click **Add**.

If you don't need some item, simply clear its edit box. Collaborator will not display empty items on the review screen.

Click **Save** to apply the changes.

After you have created the checklist, apply the checklist to a template. Only one checklist can be applied to a template. Go to the Review Templates tab on the Admin page and edit the template to make sure that the template you are using has checklists set up:

Checklists

Checklist:	Checklist Test ▼
Checklist Mandatory?:	Mandatory ▼
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Select the checklist you want to include in the review, and then select Mandatory or Non-Mandatory from the dropdown box. Mandatory checklists must have all items checked before the review can be approved.

If you revise a checklist after it has been applied to a review, the current review is not affected. The revised checklist applies only to future reviews.

3.3.16 Roles

A "Role" in Collaborator indicates the way in which a person participates in a review.

Note: This feature is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)^[34]

Roles

Collaborator supports four "roles" for review participants. The following roles are configured by default but administrators can configure completely different templates.

Author

Authors are the people responsible for the changes or documents under review. Usually they are responding to comments and questions made by reviewers and observers. In the "Fix Defects" phase the review will be "in their court" and on their [Action Items](#)^[307] list.

Reviewer

Reviewers are responsible for inspection, creating defects, and so on. With multiple reviewers, they will hopefully come to a consensus about each questionable item, but this is not required by the system. Reviewers typically [create defects](#)^[390], but again this is not required.

Observer

Observers are involved and make comments but they are not "vital" to the review. If all other participants mark the review "complete," the review goes to the next phase regardless of observer state. Observer roles are usually used when you want to bring in someone who has special expertise on an issue.

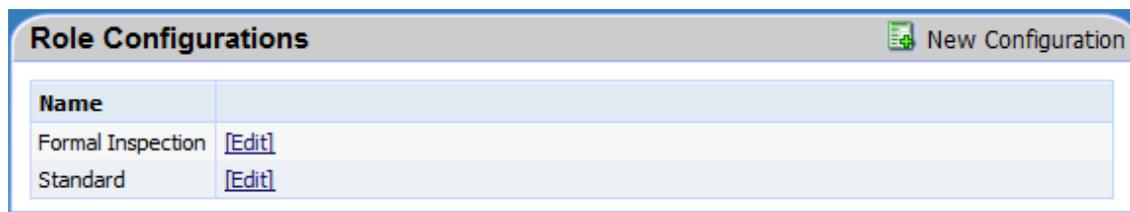
Moderator (optional, not enabled by default)

The Moderator maintains the pace and tenor of the review. This is an optional role that does not exist in the default installation. This is used for more formal review workflows where one person leads and controls the review.

Different styles of review require different roles with different terminology and rules for what each role is allowed to see and do in a review. Formal reviews might have four roles with strict rules, informal reviews might have just an author and reviewer, and a "self-check" review might just require an author with optional external reviewer.

Users interact with roles when they are [creating a new review](#)^[314] or [editing the list of participants](#)^[322] in a review.

The Role Configuration screen lets you set up any number of sets of roles. Each set is given a name and corresponds to some concept of a review.



Role Configurations		New Configuration
Name		
Formal Inspection	[Edit]	
Standard	[Edit]	

Any number of role configurations can be specified. The names here are never shown to an end user; they are used only when selecting a role configuration as part of a [review workflow](#)^[230].

In each role configuration you can have between 1 and 4 roles.

A variety of options are available when editing an existing role configuration or creating a new one:

Edit roles: Standard
 Configure role-based workflow in detail using the form below.
 To disable a role: Use a blank title.

Configuration Title: Descriptive name of this set of roles.

	Moderator	Author	Reviewer	Observer
Title:	<input type="text"/>	<input type="text" value="Author"/>	<input type="text" value="Reviewer"/>	<input type="text" value="Observer"/>
	Title that will be displayed everywhere else. A blank title disables the role.			
Role Description:		<input type="text" value="Developer responsible for the content being reviewed."/>	<input type="text" value="Someone actively involved in reviewing the materials."/>	<input type="text" value="Someone participating but not necessarily passing accept/reject"/>
	Description that will be shown in on-line help documentation.			

Configuration Title The title of this configuration. This is strictly an administrative thing -- users of the system will never see this title. They see [review workflows](#)^[230] instead.

Title The name of the role as it will appear in drop-down lists and on-line help text. The user will use this title as the primary mechanism for referring to the role.

Use a blank title to indicate that this role should be completely disabled.

The "Author" role *must* always be in the second column, although it can be renamed. It *must* always exist. The concept of the "author" is a special one in the system because the author always has special responsibilities. For example, when a review is in "Rework" phase the author's [Action Items](#)^[307] list will say "Rework defects found" whereas other participants will see "(No Action Required) Waiting for author to rework defects".

Description A description of the role that will be prominently displayed to the user in all client user interfaces where roles are chosen, most prominently in the [Participants](#)^[317] section of the Create Review wizard.

	Moderator	Author	Reviewer	Observer
Can change own defects:	Fix, Edit, and Delete	Fix, Edit, and Delete ▼	Fix, Edit, and Delete ▼	Fix, Edit, and Delete ▼
	Should this role be allowed to verify fixed, edit, or delete defects they created ? Regardless of this setting, administrators can always fix, edit, and delete defects.			
	Moderator	Author	Reviewer	Observer
Can change other users' defects:	Fix, Edit, and Delete	None ▼	Fix, Edit, and Delete ▼	Fix, Edit, and Delete ▼
	Should this role be allowed to verify fixed, edit, or delete defects created by other users ? Regardless of this setting, administrators can always fix, edit, and delete defects.			

Can change own defects

If "None", this role will be allowed to create defects, but will not be allowed to mark their own defects fixed, edit their own defects, or delete their own defects.

If set to "Edit", this role will be able to create defects and edit their own defects, but will not be allowed to mark their own defects fixed or delete their own defects.

If set to "Fix and Edit", this role will be able to create defects, mark their own defects fixed, and edit their own defects, but will not be allowed to delete their own defects.

If set to "Fix, Edit, and Delete", this role will be able to create defects, mark their own defects fixed, edit their own defects, and delete their own defects

Administrators can always change or delete any defect, regardless of this setting.

In all but the most informal of reviews, authors are typically not allowed to mark defects fixed, but all other roles are allowed.

This setting also applies to the ability to [externalize](#) a defect.

Can change other users' defects

If "None", this role will not be allowed to mark other users' defects fixed, edit other users' defects, or delete other users' defects.

If set to "Edit", this role will be able to edit other users' defects, but will not be allowed to mark other users' defects fixed, or delete other users' defects.

If set to "Fix and Edit", this role will be able to mark other users' defects fixed and edit other users' defects, but will not be allowed to delete other users' defects.

If set to "Fix, Edit, and Delete", this role will be to mark other users' defects fixed, edit other users' defects, and delete other users' defects

Administrators can always change or delete any defect, regardless of this setting.

To enable this setting, the [Restrict Access to Fix Defect](#)^[176] setting must be set to "No".

This setting also applies to the ability to [externalize](#)^[396] a defect.

	Moderator	Author	Reviewer	Observer
Marks reviews "finished":	No	No <input type="button" value="v"/>	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>
Should this role be required to indicate when the review is "finished"? Participants who have marked a review "finished" show up to other participants with "Approved" in the State column of the Participants section on the row corresponding to their name. This should be enabled for roles who have an obligation to do something in the review, e.g. open defects or make comments.				

Marks reviews "finished"

If true, users with this role will be presented with a button in the [Next Steps screen](#)^[319] that allows the user to say to the group: "I am finished looking at this review". The user will be brought back into the review if another user makes a non-trivial comment.

If false, the user is told "You must wait for other users".

Typically everyone except the author has this feature enabled. The author is usually not in control of when the review finished so his "I am finished" decision is not interesting.

	Moderator	Author	Reviewer	Observer
Phase-change waits for "finished":	No	No <input type="button" value="v"/>	Yes <input type="button" value="v"/>	No <input type="button" value="v"/>
Should a review be "complete" only when this participant has marked the review "finished"? This determines which roles have the control to say "this review is finished," either because there are no defects or because enough defects have been found to continue the review only when the author has addressed the defects. At least one role must have this ability. Otherwise reviews could never advance from the "Inspect" phase to the "Fix Defects" or "Finished" phases. If this is enabled, the <code>Marks reviews "finished"</code> option must also be enabled.				

Phase-change waits for "finished"

If true, the review does not change phases until this user says he is "finished" with the review in the [Next Steps screen](#)^[319]. A phase-change might be inspection -> rework or inspection -> complete.

For this to be true, "Marks reviews finished" must also be true.

Typically this will be enabled for reviewers but disabled for observers where the user has been invited but we do not want the review held up.

	Moderator	Author	Reviewer	Observer
Required to read all comments:	No <input type="button" value="v"/>	No <input type="button" value="v"/>	No <input type="button" value="v"/>	No <input type="button" value="v"/>
	Are users in this role required to read all comments? Typically, participants collaborate and discuss potential issues, so they are required to read each other's comments. However, some workflows have each participant work independently. If this option is set to "Yes", participants in this role will be required to mark comments read before finishing.			

Required to read all comments

Please note that "Marks reviews finished" and "Phase-change waits for finished" must both be set to "yes" in order for this setting to be evaluated for the selected roles. Changes here will have no effect if one or both of those settings are set to "no" for the specified role.

If yes, participants in this role will be required to mark comments read before finishing the review.

Typically participants collaborate and discuss potential issues, so they are required to read each other's comments. However, some workflows have each participant work independently.

Setting this configuration to "no" is usually applied to observer-type roles because they are frequently called in for something specific and do not need to "hang around" and see what other users have to say. This is also helpful in workflows where the reviewers independently submit comments to the author, who is then in charge of all changes without having to communicate back to reviewers.

Note that this setting does not prevent anyone from coming back to the review and continuing to actively participate at any time.

	Moderator	Author	Reviewer	Observer
Allowed to modify review General Information:	Yes	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>
	Should this role be allowed to modify the General Information for a review?			

Allowed to modify review General Information

Should this role be allowed to modify the review title, template, custom fields and other data of the [General Information](#)³²⁰ section?

Typically there is no harm in allowing this, but you might want to lock down exactly who has the last word on the review custom fields and title.

	Moderator	Author	Reviewer	Observer
Electronic Signature:	No	No <input type="text"/>	No <input type="text"/>	No <input type="text"/>
	Should this role be required to electronically sign reviews once they are complete? <i>'Yes: Template based' must be selected under Admin > General-Global Electronic Signatures Options and this Role must be associated to a template in order for this setting to take effect.</i>			

Electronic Signature

Should this role be required to either sign off on or decline to sign off on a completed review?

This setting takes effect when [template based electronic signatures](#) ^[183] are enabled in the [General Settings](#) ^[169] screen.

	Moderator	Author	Reviewer	Observer
Min # per review:	0	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
	Minimum number of participants with this role required in every single review. Typically "0" for optional roles, "1" for required roles.			
Max # per review:	0	<input type="text" value="99"/>	<input type="text" value="99"/>	<input type="text" value="99"/>
	Maximum number of participants with this role allowed in any single review. Typically "99" to indicate an unlimited number.			
Min # required to finish review:	0	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
	Minimum number of participants with this role that must approve a review in order to complete it.			

Min # per review

The minimum number of users with this role required in the review. Can be zero to indicate "This role completely optional". Most often used with reviewers or moderators to require at least one, or with a "very careful" review where multiple reviewers are required.

Max # per review

The maximum number of users with this role required in the review. The maximum supported number per role is 999. Usually there is no reason to limit the number of users who can participate as a role in a review, except for highly formal reviews where a strict process is required.

Min # required to finish review

The minimum number of users with this role required to approve the review in order to complete it.

This value should be less than or equal to a value specified in "Min # per review" for the respective role.

If the user role allows to mark the review as finished and this value is 0, then all users with this role must approve the review to "close" it. If the user role is not obligated to approve reviews and this value is 0, then all users with this role are not required to "close" a review.

3.3.17 Automatic Links

Collaborator creates links in text that is typed by users as review comments, custom fields, and so on. Several types of links are created automatically:

- URL's create links to that URL
- Names of files in the review create links that open that file in the Diff Viewer
- Line numbers (for example, 'line 345') in a file comment create links to that line in the Diff Viewer

Note: This feature is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)³¹

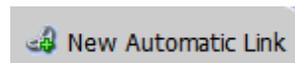
You can define your own Automatic Links to integrate Collaborator with external systems. Each Automatic Link consists of a regular expression pattern, URL format, and optionally a tooltip. When a match is found, Collaborator creates a hyperlink around the matching text. The URL of the hyperlink and the tooltip are constructed by replacing references to groups with the text selected by the corresponding capturing groups in the regular expression.



Examples of external systems you might want to link to include issue/bug trackers, build tools, or documentation library systems.

Creating New Automatic Links

To create a new Automatic Link, click the *New Automatic Link* button.



New Automatic Link

Title:	<input style="width: 90%;" type="text"/>
	Human-readable title for this automatic link, used in configuration dialogs.
Regular Expression:	<input style="width: 90%;" type="text"/>
	<u>Java-style</u> regular expression with at least one capturing group. Example: <code>case\s*(\d+)</code> This would match a string like "Case 143" but not "500 cases".
Case Sensitive:	<input type="text" value="No"/> <input type="button" value="v"/>
	Evaluate regular expression case-sensitively.
URL Format:	<input style="width: 90%;" type="text"/> <input type="button" value="Test"/>
	URL to link to, with references to groups captured in the regular expression above, in the form <code>\$groupNumber</code> . Example using FogBugz: <code>http://fogbugz.bugserver/?\$1</code>
Tooltip:	<input style="width: 90%;" type="text"/>
	Optional tooltip for link, with references to groups captured in the regular expression above, in the form <code>\$groupNumber</code> . Example: <code>Go to Case \$1</code>

Title	Human-readable title for this automatic link, only used in the Automatic Link Configuration page.
Regular Expression	<p>A <u>Java-style regular expression</u> that identifies a reference to the external tool in text. This regular expression will be used to find matches in user-entered text in review titles, custom fields, comments, and defects.</p> <p>You must include at least one one grouping expression (parenthesis). This is combined with the URL Format to link to construct the hyperlink to the external tool.</p> <p>For example: <code>case\s*(\d+)</code></p> <p>This would match a string like <code>Case 1423</code> but not <code>500 cases</code>. This is the standard way to refer to a bug in FogBugz.</p>
Case Sensitive	Evaluate regular expression case-sensitively. Usually this is set to "no".
URL Format	<p>URL to link to, with references to groups captured in the regular expression above, in the form <code>\$groupNumber</code>.</p> <p>Example using FogBugz:</p>

`http://fogbugz.bugserver/?$1`

Tooltip

Optional tooltip for link, with references to groups captured in the regular expression above, in the form `$groupName`.

Example:

Go to Case \$1

3.3.18 Notification Templates

Using settings on the **Notification Templates** page, you can customize the content of notification e-mails that Collaborator sends to review participants (see [Notifications on Review Changes](#)^[302]).

Note: This feature is only supported in Collaborator Enterprise. For a complete list of differences between Collaborator editions, please see the [comparison page](#)^[304].

About Notification Types

At the top of the page, there is a drop-down list of available notifications:

Select Notification Template to Edit

Author Complete Nocheckin

Author Complete Checkin

Author Complete Checkin Unread

Author Complete Nocheckin

Author Complete Nocheckin Unread

Author Continue Planning

Author Finish Review Required

Author Inspection

Author Rework

List Author Finish Review Required

List Cancel

List Complete Checkin

List Complete Checkin Unread

List Complete Nocheckin

List Complete Nocheckin Unread

List Continue Planning

List In Progress User Added

List In Progress User Changed

List In Progress User Removed

List Inspection Resume

List Inspection Resume Chat

complete

ail notifications and the title of entries in the RSS feed

complete

reated} by

line}

kflow}

fectlog}

Suppress Notification: If checked, this notification will not be sent. Users will not receive emails, nor will the notification appear in their RSS feed.

Save **Revert**

You can find detailed description of events [below](#)²⁶⁴ in this topic.

To modify a notification template

1. Select the desired notification from the drop-down list.
2. Specify the e-mail subject in the **Title Template** box.
3. Enter the desired e-mail text into the **Message Template** box.
4. Click **Save** to apply the changes.

Important: The text in the "Title Template" and "Message Template" boxes can include **Collaborator variables** (like `${review.id}` or `${review.creator.name}`). These variables let you insert user- and review-specific information into notifications. For complete list of available values, see [Variables](#)¹⁴⁹.

To enable or disable a notification

1. Select the desired notification from the drop-down list.
2. Select the **Suppress Notification** check box to disable the notification. Clear this check box to enable the notification.

To return to default settings

- Simply click **Restore Default Templates** on the page.

How to Determine Notification Recipients Quickly

To indicate notification recipients, Collaborator puts the following keywords at the beginning of notification name:

Recipient	Description
Author	The author of the review, for which the event is generated. The author is also called "review creator".
User	All participants of the review (except for the author).
List	All participants of the review (except for the author) and also the e-mail address (or mailing list) specified by the Notification List ^[189] setting of Collaborator. Using these notifications are convenient for notifying multiple users, including those users who are not mentioned in the Participants list of a review.
Reviewer	All users with a Reviewer role on the review.
Poke	The user, who is poked (that is, notified explicitly).

Event Descriptions

The drop-down list [at the top of the setting page](#) ^[262] displays notifications in alphabetical order. Below is a list of notifications organized by their type.

[Review Phase Notifications](#) ^[265]

[Changes in File and Participant Lists](#) ^[271]

[Changes in Comments](#) ^[272]

[Miscellaneous](#) ^[272]

Review Phase Notifications

Below is a description of notifications that Collaborator sends when a review phase changes:

<u>Annotating</u> g ²⁶⁵	<u>Planning</u> 268	<u>Stalled</u> ²⁷⁰
<u>Canceled</u> 265	<u>Rejected</u> 268	<u>Approaching Deadline</u> ²⁷⁰
<u>Complete</u> d ²⁶⁶	<u>Rework</u> 269	
<u>Inspection</u> 267	<u>Signing</u> 269	

• Annotating

The following notifications indicate that the review is in the Annotating phase:

Notification	Sent To	Remarks
List Annotating	All review participants and recipients of the Notification List e-mails	Just a notification that the review is in the Annotating phase.
User Annotating	All review participants	A notification that the review is in the Annotating phase. The default message template also describes the recipient's role in the review.

• Canceled

The following notifications indicate that the review has been canceled:

Notification	Sent To
List Cancel	All review participants and recipients of the Notification List e-mails
User Cancel	All review participants

The default notification message mentions the user, who canceled the review.

• Completed

The following notifications indicate that all the reviewers have marked the review as completed, and that the author needs to mark it as completed as well in order for the review to be finished:

Notification	Sent To
Author Finish Review Required	Review author
List Author Finish Review Required	All review participants and recipients of the Notification List e-mails

Note: Configurations on the [Admin | Roles](#) ^[253] page have the [Marks reviews "finished"](#) ^[257] setting. It specifies, to which roles the above-mentioned notifications are applicable. If this setting does not specify that some role can mark reviews as "finished", Collaborator does not send notifications to the participants that have this role.

The following notifications indicate that the review has been completed:

Notification	Sent To	Remarks
Author Complete Checkin	Review author	Indicates that the review has been completed, and the author can commit the changes to the source control.
Author Complete Checkin Unread	Review author	Indicates that the review has been completed, but has unread comments. The author can commit the changes to the source control, but should read the comments before doing this.
Author Complete Nocheckin	Review author	Indicates that the review has been completed.
Author Complete Nocheckin Unread	Review author	Indicates that the review has been completed and that there are unread comments in it.
List Complete Checkin	All review participants and recipients of the Notification List e-mails	Indicates that the review has been completed, and the author can commit the changes to the source control.
List Complete Checkin Unread	All review participants and recipients of the Notification List e-mails	Indicates that the review has been completed, but has unread comments. The author can commit the changes to the source control, but should read the comments before doing this.

Notification	Sent To	Remarks
List Complete Nocheckin	All review participants and recipients of the Notification List e-mails	Indicates that the review has been completed.
List Complete Nocheckin Unread	All review participants and recipients of the Notification List e-mails	Indicates that the review has been completed and that there are unread comments in it.
User Complete	All review participants	A notification that the review has been completed.
User Complete Unread	All review participants	A notification that the review has been completed and that there are some unread comments in it.

Note: the list above contains the Checkin and Nocheckin notifications that are very similar to each other. The notification message, which Collaborator sends, depends on the "Create a Commit Action Item for Completed Review" setting (you can find it on the [Admin | General](#) ¹⁶⁹ setting page). If the setting's value is **Create**, then Collaborator sends the "Checkin" notifications. Otherwise, it sends the "Nocheckin" notifications.

- **Inspection**

The following notifications indicate that the review is in the Inspection phase.

Notification	Sent To	Remarks
Author Inspection	Review author	Indicates that the review has got to the Inspection phase and that the author can respond to comments.
List Inspection Resume	All review participants and recipients of the Notification List e-mails	Indicates that the review returned back to the Inspection phase and that participants can review the author's proposed fixes.

Notification	Sent To	Remarks
List Inspection Resume Chat	All review participants and recipients of the Notification List e-mails	Indicates that the review returned back to the Inspection phase and that it has comments that participants need to read.
List Inspection Start	All review participants and recipients of the Notification List e-mails	Indicates that the review has got to the Inspection phase for the first time.
User Inspection Resume	All review participants	Indicates that the review returned back to the Inspection phase and that participants can review the author's proposed fixes.
User Inspection Resume Chat	All review participants	Indicates that the review returned back to the Inspection phase and that it has comments that participants need to read.
User Inspection Start	All review participants	Indicates that the review has got to the Inspection phase for the first time.

- **Planning**

The following notifications indicate that the review returned back to the Planning phase. The author needs to finish planning in order for inspection to be able to continue.

Notification	Sent To
Author Continue Planning	Review author
List Continue Planning	All review participants and recipients of the Notification List e-mails

- **Rejected**

The following notifications indicate that the review has been rejected. The default notification message says what user rejected the review.

Notification	Sent To
List Reject	All review participants and recipients of the Notification List e-mails
User Reject	All review participants

- **Rework**

The following notifications indicate that the review is in the Rework phase. The author needs to rework found defects:

Notification	Sent To
Author Rework	Review author
List Rework	All review participants and recipients of the Notification List e-mails
User Rework	All review participants

- **Signing**

Collaborator sends these notifications to indicate that reviewers need to [sign the review](#)¹⁶³.

Notification	Sent To	Remarks
Author Review Signed	Review author	Indicates that the author has signed the review.
Author Review Signed Checkin	Review author	Indicates that the author has signed the review.
<p>Note: The two notifications above are similar to each other. The notification message, which Collaborator sends, depends on the "Create a Commit Action Item for Completed Review" setting (you can find it on the Admin General¹⁶³ setting page). If the setting's value is Create, then Collaborator sends the "Checkin" notification. Otherwise, it sends the other notification.</p>		
List Complete Waiting for Signature	All review participants and recipients of the Notification List e-mails	Indicates that the review needs to be signed for approval.
List Signature Declined	All review participants and recipients of the Notification List e-mails	Indicates that some participant has declined to sign the review.

Notification	Sent To	Remarks
User Complete Signature	All review participants	The review has been completed and needs to be signed by participants.

- **Stalled**

The following notifications indicate that the review is stalled and needs some activity:

Notification	Sent To	Remarks
List Review Stalled Author Not Reworking	All review participants and recipients of the Notification List e-mails	Indicates that the review is stalled because the author needs to fix some defects.
List Review Stalled Reviewer Not Finished	All review participants and recipients of the Notification List e-mails	Indicates that the review is stalled because a reviewer needs to approve it.
Review Stalled Author Finish Annotating	Review author	Indicates that the review is stalled in the Annotating phase. It is waiting for the author to begin the Inspection phase.
Review Stalled Author Not Reworking	Review author	Indicates that the review is stalled in the Reworking phase, and that the author should fix defects.
Review Stalled Reviewer Not Finished	Participants with the Reviewer role	Indicates that the review is stalled in the Reworking phase. The default message specifies the reviewer, who needs to approve the review in order for it to be completed.
User Waiting Failed	All review participants	Indicates that the review is stalled because some review participants have already approved the review and others are waiting for each other.

- **Approaching Deadline**

The following notifications indicate that the review is approaching its deadline and needs some activity:

Notification	Sent To	Remarks
List Review Approaching Deadline Author Not Reworking	All review participants and recipients of the Notification List e-mails	Indicates that the review is approaching its deadline and the author needs to fix some defects.
List Review Approaching Deadline Reviewer Not Finished	All review participants and recipients of the Notification List e-mails	Indicates that the review is approaching its deadline because a reviewer needs to approve it.
Review Deadline Change	All review participants and recipients of the Notification List e-mails	Informs that the review's deadline has been changed.
Review Approaching Deadline Author Finish Annotating	Review author	Indicates that the review is approaching its deadline but is still in the Annotating phase. The author needs to move it to the Inspection phase.
Review Approaching Deadline Author Not Reworking	Review author	Indicates that the review is approaching deadline in the Reworking phase, and that the author should fix defects.
Review Approaching Deadline Reviewer Not Finished	Participants with the Reviewer role	Indicates that the review is approaching deadline in the Reworking phase. The default message specifies the reviewer, who needs to approve the review in order for it to be completed.

Changes in File and Participant Lists

Collaborator sends the following notifications when the review's properties change:

Notification	Sent To	Remarks
List New Files	All review participants and recipients of the Notification List e-mails	Indicates that new files have been added to the review.
List In Progress User Added	All review participants and recipients of the Notification List e-mails	Indicates that one or more users have been added to the review. The default notification message specified the users' roles in the review.
List In Progress User Changed	All review participants and recipients of the Notification List e-mails	Indicates that the role of some review participant has changed.
List in Progress User Removed	All review participants and recipients of the Notification List e-mails	Indicates that one or more users have been deleted from the review's Participants list.
User New Files	All review participants	Indicates that new files have been added to the review.

Changes in Comments

When a review is in the Inspection phase and there are unread comments, Collaborator sends the *List Inspection Resume Chat* and *User Inspection Resume Chat* notifications. See their descriptions [above](#) ^[267].

Miscellaneous

Notification	Sent To	Remarks
Poke	A review participant that you poked in the Collaborator UI	Just a notification that the review needs the user's attention.
List Calendar Invite	All review participants and recipients of the Notification List e-mails	A notification in iCalendar format to schedule a formal meeting on review.

See Also

[Notifications on Review Changes](#) ^[302]

[Variables](#) ^[149]

3.3.19 Archiving Content Cache Data

Collaborator stores the contents of files under review on the server. Over time, this cache will grow to be quite large, and will periodically need to be purged.

The **Archive** section of the Admin interface allows you to check the current status of the content cache and to archive (or delete) files that have not been in use for a long time.

File Content Archiving

Information

Collaborator Enterprise stores the contents of files under review on the server. Over time, this cache will grow to be quite large, and will periodically need to be purged. Use the form below to copy older files to an archive directory, which can then be backed up or deleted.

Currently the content cache contains approximately **51848 files** and uses **1053.28 Mb**.

Archiving

To reduce the size of your file content cache, use the form below. The content of files older than the specified date will be moved to the specified directory for archival. After archiving, you may move the contents of the archive directory to long term storage before deleting it from your server. For the purposes of archiving, a file is considered older than the date if:

Files will be archived if: The review was completed on/between the specified dates and they are part of a Completed, Rejected or Cancelled review.

Start Date:	<input type="text" value="2018-04-01"/>
End Date:	<input type="text" value="2019-06-25"/>
Path to archive:	<input type="text" value="C:\ContentArchive"/>

The **Information** panel provides estimates of the total number of files and their collective size. Keep in mind that these are approximate estimates, since a complete scan of content cache folder could take plenty time. To determine a precise size of content cache and the total number of files in it, use standard file system tools.

The **Archiving** panel allows to archive old files. A file is considered "old" if:

- A file belongs to a review that was completed within the specified date period and the review phase is completed, rejected or cancelled.

-- OR --

- The file has never been part of a review (or was a part of a deleted review) and was uploaded within the specified date period.

Files that belong to in-progress reviews (in planning, annotating, inspection or rework phases) are NOT archived.

When a file belongs both to in-progress and to closed reviews, it will be copied to created archive, but remain in content cache.

Archiving Files

Tip: Archiving could be a long lasting operation (depending on amount of files), therefore we recommend that you use this feature at night or during another time when Collaborator database is idle.

To archive old files:

1. Specify the desired date period using the **Start Date** and **End Date** fields.
2. Specify where to store the archive in the **Path to archive** field.
3. Press **Preview** to determine how many files and how much data size will be moved off by the archive.
4. Press **Archive** to create the content cache archive.

Once the files are archived, they can be preserved in long-term storage or deleted entirely.

On attempts to open any of the archived file, users would see a "Content for is not available - it was probably archived by your administrator." message.

Restoring Archived Files

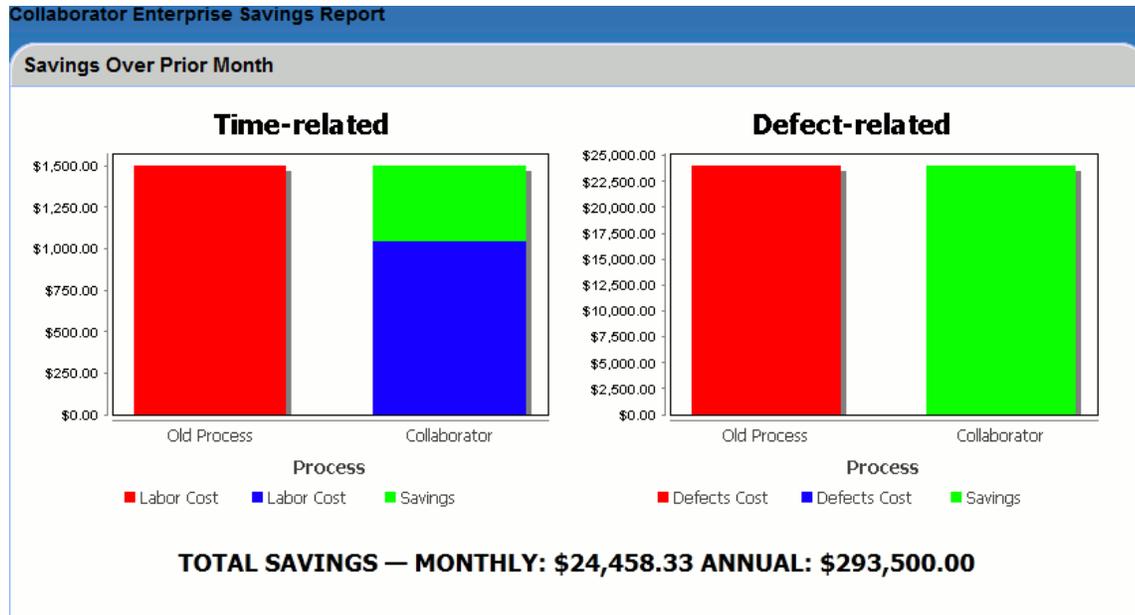
To restore files after they have been archived, simply copy them back into the live directory.

The directory structure must be preserved.

The copy operation can be done while the server is running; users will not be disrupted.

3.3.20 Savings Report

This page illustrates the benefits of a code review with Collaborator. It shows how much time and money Collaborator is likely to save your team.



We find the following two metrics clear and easy to track.

- **Labor Cost** - Developer time saved by using Collaborator to do reviews.
- **Defects Cost** - The cost to find and fix bugs discovered in QA or after product release with the cost to find and fix bugs found by Developers during code review.

To export the Savings Report in a printable format, press PDF button in the upper-right corner.

Calculations and Assumptions		
		
Calculations — Spend Less Time on Reviews		
	Old	Collaborator
Total hours spent per review (all participants)	1.50	1.04
Average time to find one defect (hours)	0.30	0.21
Cost to find defects	\$1,500.00	\$1,041.67
Cost per defect	\$15.00	\$10.42
MONTHLY COST SAVINGS	\$458.33	
ANNUAL COST SAVINGS	\$5,500.00	
Percent Cost Savings	31%	
Percent Time Savings	31%	
Calculations — Find More Defects in Dev		
Bugs that make it to QA/Customer without Collaborator Enterprise	1.5	
Weighted Average Cost to find and fix a defect	\$800.00	
Cost to find and fix additional defects per review	\$1,200.00	
Monthly cost to find and fix bugs that progress beyond Dev	\$24,000.00	
MONTHLY COST SAVINGS	\$24,000.00	
ANNUAL COST SAVINGS	\$288,000.00	

These data is calculated automatically. The default numbers come from industry-standard sources, including some of our own customer data.

Assumptions	
Number of people per review:	<input type="text" value="2"/>
Number of defects found per review:	<input type="text" value="5"/>
Number of hours spent per review per person:	<input type="text" value="0.75"/>
Labor cost per hour:	<input type="text" value="50.0"/>
Number of reviews per month:	<input type="text" value="20"/>
Defect cost, discovered in Development:	<input type="text" value="25.0"/>
Defect cost, discovered in QA:	<input type="text" value="200.0"/>
Defect cost, discovered by customer:	<input type="text" value="3200.0"/>
% more defects found/fixing using Collaborator:	<input type="text" value="30"/>
<input type="button" value="RECALCULATE"/> <input type="button" value="REVERT"/>	

To get a personalized calculation, please specify the following initial data that better reflect your code review process:

Number of people per review

Number of people that usually take part in one review. You can get [Minimal](#)^[259] and [Minimal required](#)^[259] number of participants from [Role configuration](#)^[253] settings.

Number of defects found per review

Average number of defects found in a single review.

Number of hours spent per review per person	How much time one person spends on a single review. Studies show that developers find a bug every 10-15 min with Collaborator. That is, 4.8 bugs in an hour.
Labor cost per hour	Average per hour salary of your developers.
Number of reviews per month	Average number of reviews in a month. Benchmark: Smart Bear's team of 5 developers does 75 reviews/month. For a team of 25, that review frequency would be 375 reviews per month.
Defect cost, discovered in Development	The cost of a defect found during development. Code review typically costs 30% that of QA because bugs are found faster and locations/methods of fixes are already identified.
Defect cost, discovered in QA	The cost of a defect found during quality assurance.
Defect cost, discovered by customer	The cost of a defect found in production.
% more defects found/fixed using Collaborator	How many defects were found by code reviews with Collaborator. We have chosen 30% as a default but feel free to change it. If your current code review process is not finding many bugs, then you should probably increase this value.

When done, press **Recalculate**.

The **Fun Facts** section may help you in filling in the assumptions data as it displays the code review statistics within the previous 30 days.

3.3.21 Syntax Highlighting

When users open any text-based file in the [Diff Viewer](#)³⁵¹ and the "[Syntax Coloring](#)"³⁴⁶ option is enabled, Collaborator attempts to determine a computer language of this file and apply an appropriate syntax highlighting to it.

Collaborator has built-in support of syntax highlighting for most popular computer languages: C+, C#, Java, Ruby, Perl, ASP.Net, Python, SQL, HTML, XML and many others. Additionally, Collaborator administrators can create custom syntax highlighting schemas to add syntax highlighting for any other computer language.

The Syntax Highlighting page of the Admin screen allows you add, manage and delete syntax highlighting schemas for various computer languages.

Syntax highlighting schema denotes what fragments of text should be highlighted as keywords, strings, constants, comments and so forth. It also specifies a list of file extensions to which the scheme will be applied. All syntax highlighting schemas are completely configurable, that is, you can specify new file extensions, add or delete keywords, modify patterns for strings, comments and so forth.

Important. In order to see highlighting schema updates within existing reviews, end-users may need to clear their browser's cache or upload new revisions of the review material.

The Schemas List provides a list of all available schemas, both predefined (default) and custom-created.

Manage Syntax Highlighting Settings

Create New Schema

Schema name:

CREATE

Schemas List

Schema Name	Description	
Ada language	Schema for Ada language	[Delete]
ASP.NET language	Schema for Active Server Pages for .NET (ASP.NET)	[Delete]
Assembler language	Schema for Assembler language	[Delete]
Base C-family language	Base schema for C-family languages	[Delete]
C# language	Schema for Microsoft C# language	[Delete]
C++ language	Schema for C++ language	[Delete]
Cobol language	Schema for GNU Cobol language	[Delete]
CSS	Schema for Cascading Stylesheet language	[Delete]
Delphi language	Schema for Delphi language	[Delete]
Gosu language	Schema for Gosu language	[Delete]
HTML	Schema for HyperText Markup Language (HTML)	[Delete]
Java language	Schema for Java language	[Delete]
JavaScript language	Schema for JavaScript language	[Delete]
JavaServer Pages (JSP) language	Schema for JavaServer Pages language	[Delete]
Objective-C language	Schema for Objective-C language	[Delete]
Perl language	Schema for Perl language	[Delete]
PHP language	Schema for PHP Markup language	[Delete]
PHP Language Embedded Schema	Schema for embedded PHP Markup	[Delete]
Python language	Schema for Python language	[Delete]
Ruby language	Schema for Ruby language	[Delete]
SGML	Schema for Standard Generalized Markup language (SGML) and any SGML-based language	[Delete]
Shell Script language	Schema for Shell Script language	[Delete]
SQL Script language	Schema for SQL Script language	[Delete]
TCL-based language	Schema for any TCL-based language	[Delete]
Verilog language	Schema for Verilog language	[Delete]
VHDL	Schema for VHSIC Hardware Description Language	[Delete]
Visual Basic	Schema for Visual Basic language	[Delete]
XML	Schema for Extensible Markup Language (XML)	[Delete]

Creating a syntax highlighting schema

To create a syntax highlighting schema for a new computer language, scroll to the **Create New Schema** section, specify name for a new schema and press **Create**.

This will create a blank schema which you can configure as you like.

Deleting a syntax highlighting schema

To delete a syntax highlighting schema, locate the desired schema in the list and press **Delete** link next to it.

Resetting predefined syntax highlighting schemas

To reset predefined syntax highlighting schemas to their initial state, scroll to the **Restore default highlighting schemas** section and press **Restore Defaults**.

This action affects only predefined schemas, it does not alter custom schemas.

Modifying a syntax highlighting schema

Click the name of the desired syntax highlighting schema in the Schemas List. This will display schema editor.

The editor has several tabs to configure different aspects of syntax highlighting. All the tabs will be described below.

On the **General** tab you can specify general set of scheme parameters.

The screenshot shows a web-based editor for a syntax highlighting schema. The title is "Edit 'Ada language' Syntax Highlighting Schema". There are several tabs: "General", "Keywords", "Keyword Patterns", "Strings", "Constants", "Comments", "Embedded Code Patterns", and "Miscellaneous Patterns". The "General" tab is selected. It contains the following fields:

- Schema name:** A text input field containing "Ada language".
- Schema description:** A text area containing "Schema for Ada language".
- Based on:** A dropdown menu set to "None" with a small downward arrow. Below it is the text "Select a schema this schema is based on".
- Language is case-sensitive:** A checkbox that is currently unchecked.
- File extensions:** A text area containing ".ada", ".adb", and ".ads" on separate lines.

At the bottom of the form are two buttons: "SAVE" and "REVERT".

Schema name Defines a name of the syntax highlighting schema.

Schema description Defines a detailed description for the syntax highlighting schema.

Based on One computer language could be based on another computer language. For example, C++ and C# languages are based on C language and HTML is based on SGML.

Syntax highlighting schemas may inherit a number parameters from their parent schemas, so that you will not need to redefine the same parameters twice.

Select "None" if the desired computer language is not based on any other language. Otherwise select a schema of the parent language in the drop-down list.

Language is case-sensitive

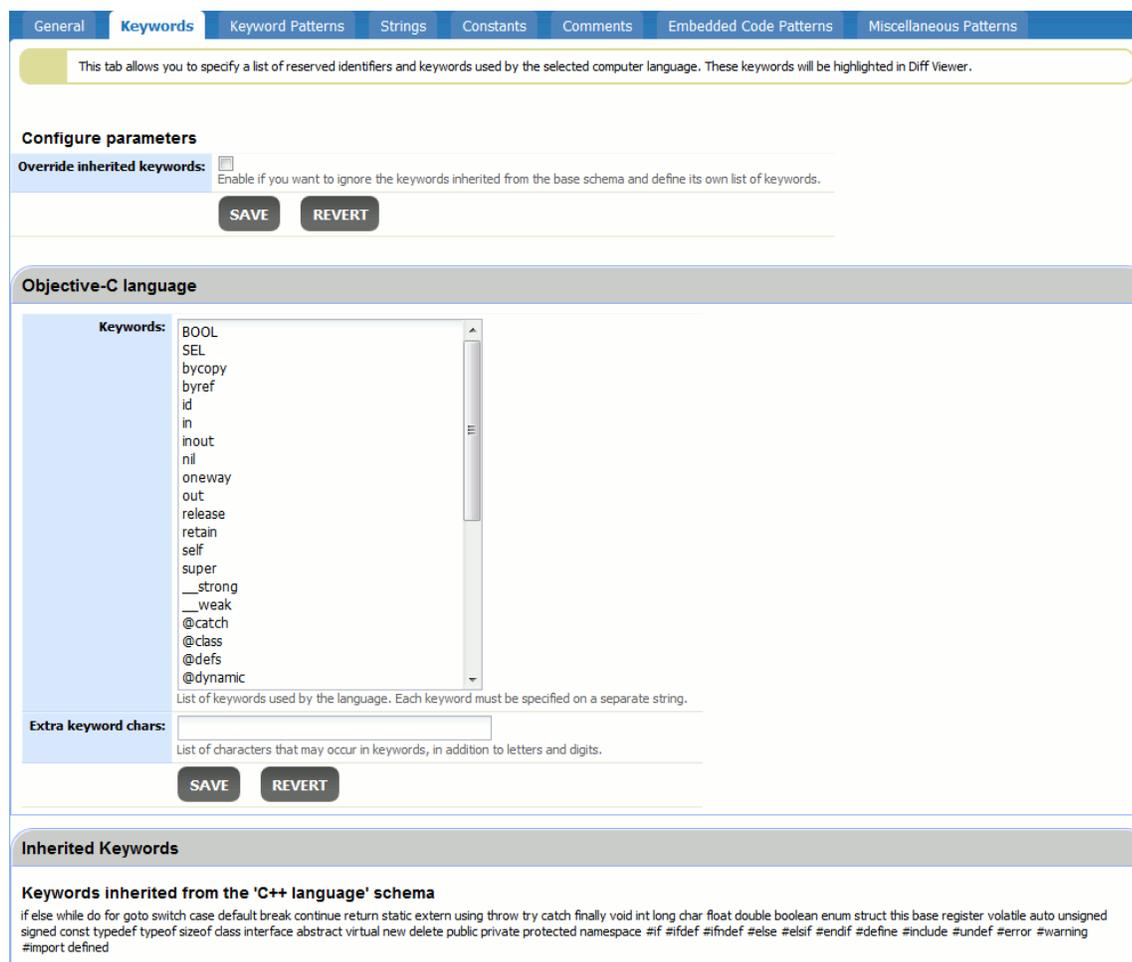
Specifies whether the computer language is case-sensitive.

File extensions

Defines a list of extensions which may have source code files of the selected computer language. Specify each extension separated by semicolon, comma or space characters, or specify them on a separate line. Prefix each with a dot character.

Collaborator checks this list of file extensions to determine a syntax highlighting schema to apply for a file displayed in the [Diff Viewer](#)³⁵¹.

On the **Keywords** tab you can specify a list of reserved identifiers and keywords used by the selected computer language.



Override inherited keywords

This option is displayed only if current schema is based on some other schema.

Indicates whether you want to ignore the keywords inherited from parent schemas and define its own list of keywords. The list of keywords inherited from the parent schemas is displayed in the bottom of the tab.

Keywords

List of keywords used by the language. Specify each keyword separated by semicolon, comma or space characters, or specify them on a separate line.

Extra keyword chars

Some computer languages may have keywords that consist of 2 or more words/identifiers separated by some special characters. For example, Cobol language has keywords like ALPHANUMERIC-EDITED, SEGMENT-LIMIT and so forth.

Use this setting to define a list of characters that may occur in keywords of this language, in addition to letters and digits. Specify each character separated by semicolon, comma or space character.

In addition to reserving specific lists of words, some computer languages reserve entire ranges of words or notation formats. For example, HTML tags or CSS selectors have a specific notation format. Another example is C and C++ languages where any identifiers that start with two underscore characters are reserved.

To apply syntax highlighting to a specific fragments of source code, Collaborator uses regular expression patterns. Each syntax highlighting schema allows specifying multiple patterns to highlight keywords, strings, constants, comments, embedded code and other important fragments of source code.

On the **Keyword Patterns** tab you can specify a list of patterns to denote reserved identifiers and keywords used by the selected computer language.

The screenshot shows the 'Keyword Patterns' configuration interface. At the top, there are tabs for 'General', 'Keywords', 'Keyword Patterns' (selected), 'Strings', 'Constants', 'Comments', 'Embedded Code Patterns', and 'Miscellaneous Patterns'. Below the tabs, there is a text box with instructions: 'In addition to reserving specific lists of words, some computer languages reserve entire ranges of words. For example, in C and C++ any identifiers that start with two underscore characters are reserved. This tab allows you to specify a list of patterns to denote reserved identifiers and keywords used by the selected computer language. Text fragments that match the specified patterns will be highlighted in Diff Viewer. To specify patterns use Java-style regular expressions.' Below this is a 'Configure parameters' section with an 'Override inherited patterns' checkbox (unchecked) and a description: 'Enable if you want to ignore the patterns inherited from the base schema and define its own set of patterns.' There are 'SAVE' and 'REVERT' buttons. At the bottom, there is a 'CSS keyword patterns' section with a 'New Pattern' button and a table with columns 'Title' and 'Regular Expression'. The table contains one entry: 'CSS selector' with the regular expression '([#w\.,|s:-]+){' and a 'Delete' link.

Override inherited patterns

This option is displayed only if current schema is based on some other schema.

Indicates whether you want to ignore the patterns inherited from parent schemas and define its own set of patterns. The list of patterns inherited from the parent schemas is displayed in the bottom of the tab.

To edit an existing pattern, click its name in the list. To create a new pattern, click **New Pattern**. Any of these actions will display a "Configure lexeme pattern data" form:

Configure lexeme pattern data

Title:	<input type="text" value="CSS selector"/>
Description:	<input type="text" value="A pattern to highlight CSS selectors"/>
Regular Expression:	<input type="text" value="([#\w\.,\s:-]+\{"/>
Enable Unix lines mode:	<input type="checkbox"/>
Enable case-insensitive matching:	<input type="checkbox"/>
Permit whitespace and comments in RegEx:	<input type="checkbox"/>
Enable multiline mode:	<input type="checkbox"/>
Enable literal parsing of the regEx:	<input type="checkbox"/>
Enable dotall mode:	<input type="checkbox"/>
Enable Unicode-aware case folding:	<input type="checkbox"/>
Enable canonical equivalence:	<input type="checkbox"/>
Enable the Unicode version character classes:	<input type="checkbox"/>
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Title	Defines a name of the lexeme pattern.
Description	Defines a detailed description for the lexeme pattern.
Regular Expression	A <u>Java-style regular expression</u> that identifies the desired fragment of text.
Enable Unix lines mode	When this flag is specified then only the '\n' line terminator will be recognized in the behavior of ., ^, and \$.
Enable case-insensitive matching	When this flag is specified then two characters will match even if they are in a different case. By default, case-insensitive matching assumes that only characters in the US-ASCII char-set are being matched. To enable Unicode-aware case-insensitive matching, enable both this and the "Enable Unicode-aware case folding" flags.

Permit whitespace and comments in RegEx	When this flag is specified then white-spaces will be ignored, and embedded comments starting with # will be ignored until the end of a line.
Enable multiline mode	In multiline mode the expressions ^ and \$ match just after or just before, respectively, a line terminator or the end of the input sequence. By default these expressions only match at the beginning and the end of the entire input sequence.
Enable literal parsing of the regEx	Treat pattern string as a sequence of literal characters. In this case, metacharacters or escape sequences will not have any special meaning.
Enable dotall mode	In dotall mode, the expression . matches any character, including a line terminator. By default this expression does not match line terminators.
Enable Unicode-aware case folding	When this flag is specified then case-insensitive matching (if enabled by the "Enable case-insensitive matching" flag) will be performed in a manner consistent with the Unicode Standard. By default, case-insensitive matching assumes that only characters in the US-ASCII charset are being matched.
Enable canonical equivalence	When this flag is specified then two characters will be considered to match if, and only if, their full canonical decompositions match. The expression "a\u030A", for example, will match the string "\u00E5" when this flag is specified. By default, matching does not take canonical equivalence into account.
Enable the Unicode version character classes	Enables the Unicode version of Predefined character classes and POSIX character classes.

Once specified the pattern data, click **Save**. Add as many patterns as you need.

Other tabs of syntax highlighting schema editor have the same functionality, but deal with different syntactical elements:

On the **Strings** tab you can specify a list of patterns to denote string literals within the selected computer language.

On the **Constants** tab you can specify a list of patterns to denote constants.

On the **Comments** tab you can specify a list of patterns to denote comments.

Some computer languages may include fragments of code on another computer language. Typical examples are client-side and server-side scripts. Based on HTML, they include fragments of embedded code on JavaScript, PHP, ASP.Net, Ruby and other languages.

Collaborator may apply syntax highlighting to embedded code as well. To do this, you need to define a list of patterns that will match the fragments of embedded code in the **Embedded Code Patterns** tab and select which syntax highlighting schema must be applied to these fragments in the **Embedded code schema** drop-down list.

On the **Miscellaneous Patterns** tab you can specify a list of any other syntactical elements to be highlighted.

4 Web Client

This chapter describes the web user interface of Collaborator. The Web Client allows you to perform all types of peer review tasks: create reviews as an author, participate in someone else's reviews as a reviewer or observer, inspect the review materials and so forth.

In order to use the Collaborator's Web Client, your administrator must first [install and configure](#) ^[56] the server part of Collaborator.

The topics of this section contain detailed information on working with web client.

In This Section

- [Web Client - Overview](#) ^[287]
Provides general information about Collaborator's Web Client.
- [Account Management](#) ^[288]
Contains information on your Collaborator's user account settings, logging in and logging out operations and subscribing to notifications.
- [Performing Reviews](#) ^[306]
Describes creating, performing, and managing peer reviews.
- [Searching & Reporting](#) ^[397]
Describes how to search for reviews and how to create reports.
- [Troubleshooting](#) ^[422]
Describes how to gather a support logs in case of troubles.

Related Topics of Interest

- [Collaborator Server](#) ^[56]
Describes the server component of Collaborator.

- [Desktop Clients](#) ^[423]
Describes GUI Client, Command-Line Client, plugins for Eclipse, Microsoft Visual Studio and other clients for desktops.

4.1 Web Interface Client - Overview

The Collaborator's Web Client allows you to perform all types of peer review tasks: create reviews as an author, participate in someone else's reviews as a reviewer or observer, inspect the review materials and so forth.

Requirements

In order to use the Collaborator's Web Client, your administrator must first [install and configure](#) ^[36] the server part of Collaborator.

The Web Client supports the following browsers:

- Microsoft Internet Explorer 10.0 and later
- Microsoft Edge
- Mozilla Firefox 3.x and later
- Apple Safari 3.x and later
- Google Chrome 3.x and later

Other browsers and versions *might* work to varying degrees.

Opening Web Client

To open the Collaborator's Web Client just start a web browser and navigate to the URL of the Collaborator Server. If you do not know the URL, ask your Collaborator administrator.

If you have not been authenticated, you will be redirected the [Log-in Screen](#) ^[289]. Otherwise, the Home Page will be displayed.

The screenshot shows the SmartBear Collaborator web client home page. The navigation bar at the top includes 'HOME', 'REVIEW', and 'REPORTS' tabs. Below the navigation bar, there are sections for 'ACTION ITEMS', 'RECENT REVIEWS', 'LINKS', 'TOOLS', and '+ NEW REVIEW'. The 'ACTION ITEMS' section displays a table of reviews with columns for Review, Progress, Author, My Role, and Deadline. The 'Collaborator News' section on the right contains updates and resources. The footer includes system information and user details.

Review	Progress	Author	My Role	Deadline
Review #14175: "Review description of Oracle search settings" (overdue)	Waiting for comments	John Smith	Author	2019-02-10
Review #14400: "Github pull request #1506. (add) COLLAB-4725. Problem: new client can't clearly understand what ..." (overdue)	Perform	Clive Sinclair	Stakeholder	2019-05-18
Review #14493: "Github pull request #1560. COLLAB-4255 (fixed) Display LOC differences the same way it is displa..." (due today)	Perform	Hector Patton	Stakeholder	2019-06-27
Review #14499: "Github pull request #1566. (fixed) COLLAB-5717 Moved back s erver url to review url for emails" (due in 1 day)	Perform	Lynn Carr	Stakeholder	2019-06-28
Review #14502: "Licensing Staff" (due in 1 day)	Annotate Review	Hector Patton	Stakeholder	2019-06-28
Review #14505: "What's New in 12.0" (due in 1 day)	Waiting for comments	John Smith	Author	2019-06-28

Collaborator Web Client Home Page

From the Home Page you can:

- Check your [Action Items](#)^[307] to see if you have any assigned reviews.
- View detailed information about the review in the [Review Summary Screen](#)^[316].
- Create [new reviews](#)^[309].
- [Search](#)^[398] for specific reviews or generate various [reports](#)^[407].
- Manage your [user preferences](#)^[297] and [notifications](#)^[302].
- Read news, release announcements, webinar invitations and other information from the SmartBear.

4.2 Account Management

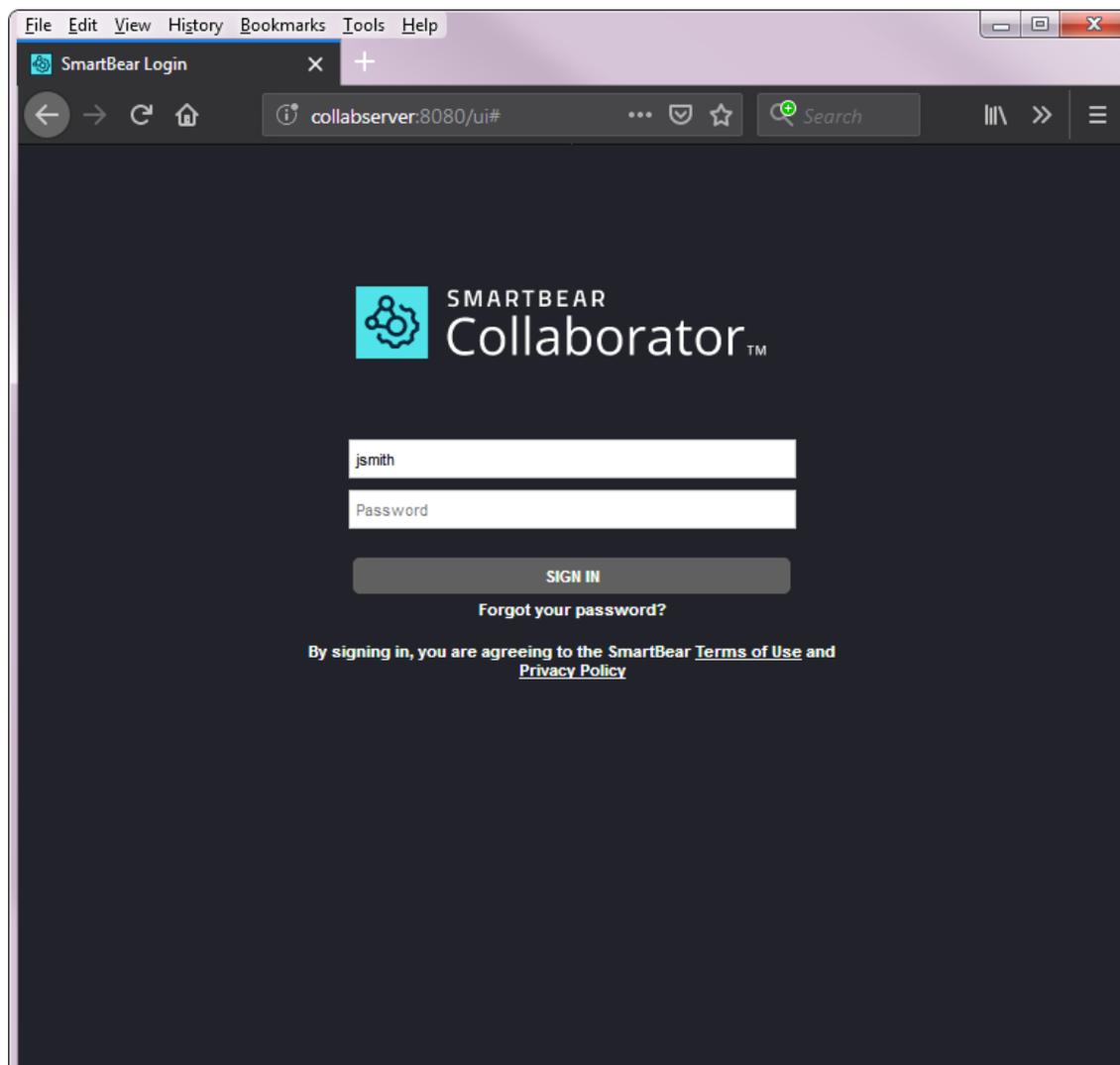
Topics of this section contains information on your Collaborator's user account settings, logging in and logging out operations and subscribing to notifications.

In This Section

- [Logging In and Logging Out](#) ^[289]
Describes how to log in to and log out from Collaborator.
- [User Preferences](#) ^[291]
Provides information on user account settings.
- [Notifications on Review Changes](#) ^[302]
Contains information on notifications that Collaborator sends to inform review participants on review changes.

4.2.1 Log in / Log out

When you visit the main Collaborator web page, you are prompted with a log-in screen:

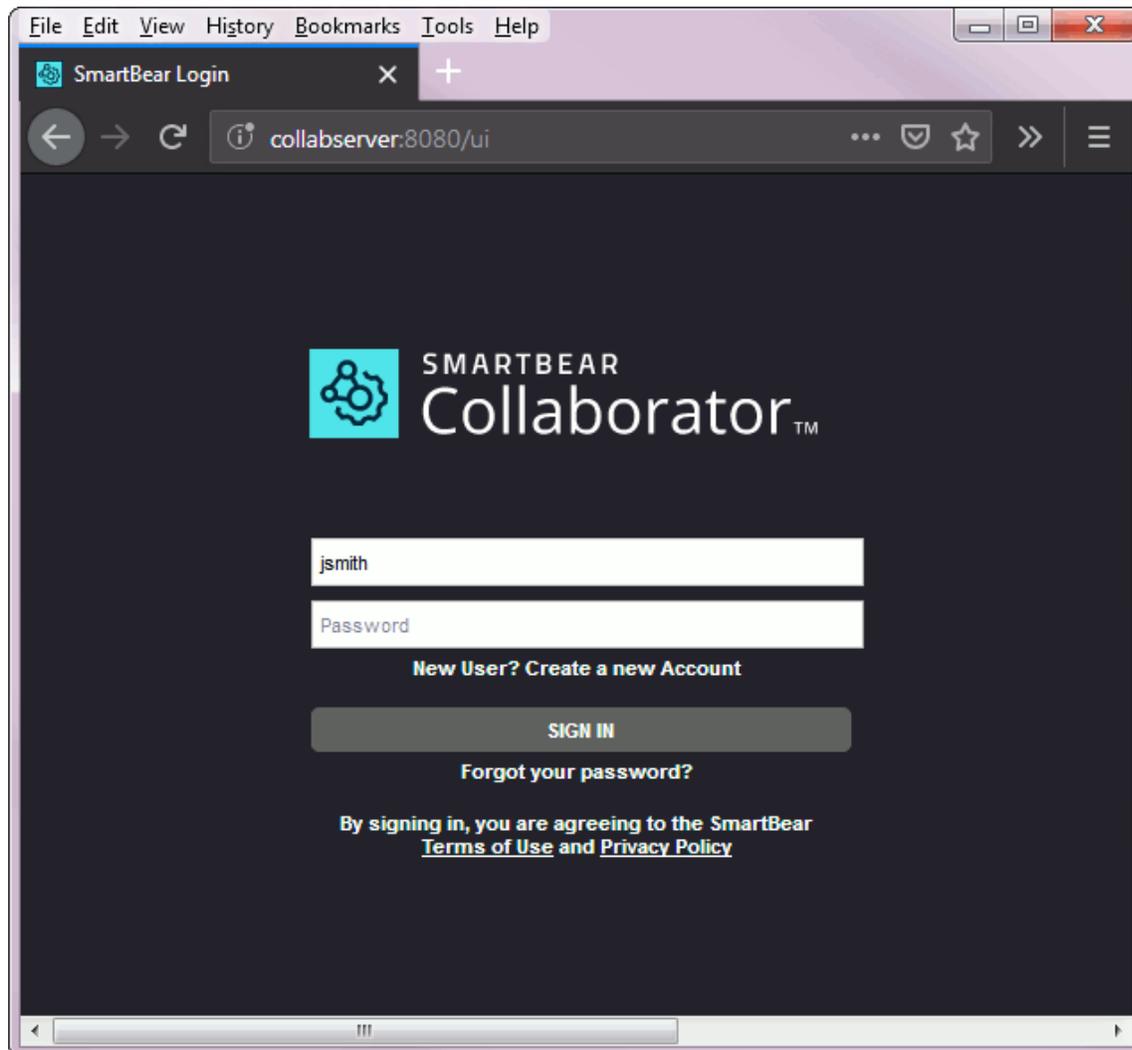


The URL to this screen will depend on your system administrator. It often includes a special port number.

Typically, accounts in Collaborator will be identical to your version control system account.

If your account is not set up, you will need to contact an administrator to [set one up](#)^[206]. If you use [LDAP or ActiveDirectory](#)^[106] for authentication in your company, you can use that username/password with Collaborator and it will automatically create your user account.

Some system administrators will have [enabled](#)^[109] a "Create an account" form on the front page:



Once you are logged in, you are redirected to the Home Page. You can log out using the "Logout" button in the menu bar, but this is usually not necessary.

The screenshot displays the SMARTBEAR Collaborator v4.2.2 interface. The top navigation bar features 'HOME', 'REVIEW', 'REPORTS', and 'ADMIN'. Below this is a secondary bar with 'ACTION ITEMS', 'RECENT REVIEWS', 'LINKS', 'TOOLS', and 'SETTINGS'. The main content area shows a table of Action Items with columns for Review, Progress, Author, and My Role. A 'Collaborator News' sidebar on the right contains a 'LOGOUT' button and links for resources and notifications.

Review	Progress	Author	My Role
Review #1: "Untitled Review"	Finish creating	John Smith	

If you do not explicitly log out, the system will give your browser a cookie so the next time you go into a page you will not have to re-login first.

4.2.2 User Preferences

To edit your settings and preferences, use the **Settings** menubar command:

This close-up screenshot highlights the 'SETTINGS' button in the user interface. The 'LINKS' and 'TOOLS' buttons are also visible. Below the buttons, the 'Collaborator News' sidebar is partially visible, showing 'Collaborator Resources' and a 'LOGOUT' button.

Account Information

Account	Notifications	Display	Review Subscriptions	File Subscriptions	Template Subscriptions	Remote Accounts
Login:	<input type="text" value="jsmith"/>					
Password:	<input type="password" value="....."/> <input type="password" value="....."/> (again to confirm)					
	<div style="border: 1px solid black; padding: 2px; display: inline-block;">INVALIDATE LOGIN TICKET</div> Clicking 'Invalidate Login Ticket' will effectively log out all clients connected to the server as the current user. Clients will need to present basic auth credentials in order to reconnect.					
First Name:	<input type="text"/>					
Last Name:	<input type="text"/>					
Department:	<input type="text"/>					
Display Name:	<input type="text" value="John Smith"/>					
Phone Number:	<input type="text" value="+123456"/>					
Time zone:	<input type="text" value="(GMT +0000) Greenwich"/> <input type="button" value="v"/> <small>Select the time zone that you would like to use.</small>					
Is Administrator:	<input type="text" value="Yes"/> <input type="button" value="v"/>					
Is Enabled:	<input type="text" value="Enabled"/> <input type="button" value="v"/> <small>Disabled users are not allowed to log in and don't count in licensing. You cannot delete users because the user record is needed for reports and to view old reviews; disabling a user is the only way to remove it from the system.</small>					
Can Edit Templates:	<input type="text" value="Yes"/>					
Can Edit Custom Fields:	<input type="text" value="Yes"/>					
Can Edit Checklists:	<input type="text" value="Yes"/>					
Can Edit Roles:	<input type="text" value="Yes"/>					
Can Edit Automatic Links:	<input type="text" value="Yes"/>					
Can Create Child Groups:	<input type="text" value="Yes"/> <small>This setting only applies for the Group Admin!</small>					
	<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>					

Login

The token you use to [log into](#)²⁸⁹ the system. Typically this will be identical to your version control login name.

Normally, you cannot edit your own login name. However, system administrators are able to edit anyone's login name, so contact an administrator if you need this done.

Password

The password needed to log into the system. Can be blank for "no password," although in all cases the password will be displayed with many dots as shown in the screenshot above. This prevents the casual observer from knowing anything about your password, even its length.

When changing your password you have to type it in twice to confirm.

First Name and Last Name

Your first and last name, respectively.

If your server uses LDAP or AD authorization, these fields are read-only.

Department	<p>Name of your department, if any.</p> <p>If your server uses LDAP or AD authorization, this field is read-only.</p>
Display Name	<p>Your display name. This is displayed to other users everywhere in the system. You can change this setting at any time.</p> <p>If you leave this field blank your login name will be used for your name. This is undesirable however; most other users will not know you by your login name.</p>
Phone Number	<p>The phone number other users can reach you at. This field is optional.</p>
Time Zone	<p>Your time zone. This will be used to determine users's displayed date/time.</p> <p>This is defaulted to the time zone selected on the Collaborator server.</p>
Is Administrator	<p>Controls whether you are a system administrator^[210]. Typically, you are not able to change this field, unless you are an administrator. Be careful: If you remove administrative access from yourself, there is no going back! (Unless another administrator adds you back.)</p>
Is Enabled	<p>This field is used by system administrators to determine whether you are allowed^[210] to log into the system. If you are looking at your preferences, you can log in, so you will always see this as "enabled".</p>
Can Edit Templates	<p>Controls whether you have permissions^[211] to manage templates^[230]. Typically, you are not able to change this field, unless you are an administrator.</p>
Can Edit Custom Fields	<p>Controls whether you have permissions^[211] to manage custom fields^[235]. Typically, you are not able to change this field, unless you are an administrator.</p>
Can Edit Checklists	<p>Controls whether you have permissions^[211] to manage checklists^[250]. Typically, you are not able to change this field, unless you are an administrator.</p>
Can Edit Roles	<p>Controls whether you have permissions^[211] to manage roles^[253]. Typically, you are not able to change this field, unless you are an administrator.</p>
Can Edit Automatic Links	<p>Controls whether you have permissions^[211] to manage automatic links^[260]. Typically, you are not able to change this field, unless you are an administrator.</p>

Can Create Child Groups

Controls whether you have [permissions](#)^[217] to create child groups. Actual for [group administrators](#)^[217]. Typically, you are not able to change this field, unless you are an administrator.

Notification Preferences

E-Mail Address

The email address that you want all notifications delivered to, and also to display to other users in the system in case they want to contact you directly via email.

Although this field is technically not required, you really should fill it in, and if you do not, you will get a warning in your [Action Items list](#)^[307].

Notification Level

This controls how many e-mails you want to get. See the [Explain] link for details on the options. Generally, these are the choices:

- Get all notifications, even if you were the cause of the notification event
- Get notification only of those events that you did not cause yourself
- Get no email notifications

Default Wait State

Specifies the default level of notifications when you perform the "Wait" action during reviews. Possible values are:

- Any Activity Occurs

- Activity by Author Occurs
- File Activity Occurs
- Someone Pokes Me

Default Send To State

Specifies the default level of notifications when you perform the "Send To" action during reviews. Possible values are:

- Any Activity Occurs
- Activity by Author Occurs
- File Activity Occurs
- Someone Pokes Me

Get Cc'ed

This allows you to receive copies of notifications on changes if you are the author of the review.

Display Preferences

Account	Notifications	Display	Review Subscriptions	File Subscriptions	Template Subscriptions	Remote Accounts
Tutorial Mode:			On <input type="button" value="v"/>			
			Display tutorial pop-up boxes to assist in understanding the screens?			
Revision Ordering:			Alphabetical <input type="button" value="v"/>			
			Whether to list file revisions alphabetically or by order of upload?			
Materials Display Mode:			Overlay <input type="button" value="v"/>			
			Whether to display review materials in Overlay or Separate mode?			
File View:			Compressed Tree <input type="button" value="v"/>			
			Default style to display files within a changelist			
Compact View:			Use admin setting (Disabled) <input type="button" value="v"/>			
			Whether the Review Summary screen should be displayed in a format that uses less vertical space.			
Select WebUI theme:			Classic <input type="button" value="v"/>			
			Select the WebUI theme that you would like to use.			

Tutorial Mode

Controls whether those little yellow tutorial boxes are displayed throughout the system. By default, these boxes are displayed to help you understand the user interface.

Revision Ordering

Controls how file revisions are displayed, alphabetically or by order of upload.

Materials Display Mode

Allows the selection of the default display mode (Overlay or Separate) of materials on the Review Summary page.

File View

Controls which style should be used to display files within a changelist. Choices include Compressed Tree, Tree, or Flat.

Compact View

When enabled, the Review Summary screen is presented in a format that uses less vertical space.

Select WebUI theme

Specifies which of pre-defined [Web client](#)²⁸⁶ themes you would like to use. This setting overrides the [default WebUI theme](#)¹⁷⁴ selected by administrator.

Date and Time	
Date Format Pattern:	<input type="text" value="yyyy-MM-dd"/> <small>Date pattern may include these elements (yy, yyyy, M, MM, MMM, MMMM, d, dd, EEE, EEEE) and any separators.</small>
Time Format Pattern:	<input type="text" value="HH:mm"/> <small>Time pattern may include these elements (h, hh, m, mm, s, ss, ms, a, z, Z) and any separators.</small>

Date Format Pattern

Specifies the preferred format of date values. The format pattern may include the following elements:

Element	Description
yy	The last two digits of the year (that is, 2001 would be displayed as "01").
yyy y	The full year (that is, 2001 would be displayed as "2001").
M	The one- or two-digit month number.
M M	The two-digit month number. Single-digit values are preceded by a zero.
M M M	The three-character month abbreviation.
M M M M	The full month name.
d	The one- or two-digit day.
dd	The two-digit day. Single-digit day values are preceded by a zero.
EE E	The three-character weekday abbreviation.

EE EE	The full weekday name.
----------	------------------------

The format pattern includes the elements specified above separated by the desired symbols (;, /, spaces and so on). These symbols will be used as separators for the shown date/time values.

Below are some examples of date format patterns:

Pattern	Displayed Value
yyyy-MM-dd	2001-05-15
d/M/yy	15/5/01
d MMMM yyyy, EEEE	15 May 2001, Tuesday

Time Format Pattern

Specifies the preferred format of time values. The format pattern may include the following elements:

Element	Description
h	The one- or two-digit hour.
hh	The two-digit hour. Single-digit hour values are preceded by a zero.
m	The one- or two-digit minute.
mm	The two-digit minute. Single-digit minute values are preceded by a zero.
s	The one- or two digit second.
ss	The two digit second. Single-digit second values are preceded by a zero.
ms	The milliseconds.
a	The time would be displayed in the 12-hour format.

z	The alphanumeric time zone offset from UTC (that is, Pacific Standard Time would be displayed as "UTC-8").
Z	The four-digit time zone offset from UTC (that is, Pacific Standard Time would be displayed as "-8000").

The format pattern includes the elements specified above separated by the desired symbols (;, /, spaces and so on). These symbols will be used as separators for the shown date/time values.

Below are some examples of time format patterns:

Pattern	Displayed Value
hh:mm	09:17
h:m:ss.ms	9:17:38.486
h:m a z	9:17 AM UTC-5

Diff Viewer

Default Revision Comparison of Diff Viewer: All
When comparing a file with an older revision in the Diff Viewer, what should the default comparison be between?

Enable Next Page Scrolling in Diff Viewer: Enabled
Should Diff Viewer display the next page when reached the end of current page?

Default Scale for Documents in Diff Viewer: Page Width
What scale should be used for document comparison in Diff Viewer?

Revision Caption Pattern:

- Provider - Display provider type, like 'git', 'mercurial', 'none', 'local changes', and so on
- Creation Time - Display item creation time.
- Item ID - Display unique item identifier. For example, commit ID.
- Description - Display item description. For example, commit message.

Select what information should be displayed as the revision caption in the Diff Viewer.

Ignore Whitespaces: Whether whitespace characters should be taken into account when showing differences in text files.

Ignore Capitalization: Whether letter case should be taken into account when showing differences in text files.

Ignore Sequence Number: Whether COBOL sequence numbers should be taken into account when showing differences in text files.

SAVE
REVERT

Default Revision Comparison of Diff Viewer

Allows the user to select which file revisions (if available) will be compared, by default, when the Diff Viewer is launched.

The available options are:

- All changes - Compare the current revision of a file against its *base revision* - that is, a state of file before any changes related to current review have been made. For pre-commit reviews, base revision is the revision that you checked out from the repository. For post-commit reviews, base revision is the revision that precedes your commit.
- First vs Last - Compare the most recent revision of a file against its first revision that was uploaded during this review.
- Branch only - Compare the current revision of a file against its base revision excluding changes merged from other branches.
- Last commit - Compare the current revision of a file and its previous revision.
- Accepted - Compare the current revision of a file against its latest **accepted revision**³⁸⁸. During the review, participants may accept some particular revisions of a file to denote that they agree with the changes. Uploading a further revision of that file clears the Accepted mark. If a participant has not accepted any revision yet, then compares the current revision of a file against its base revision.
- Commits - Compare the most recent revision against any arbitrary revision chosen in the **Select revision** drop-down.

The "Branch only" mode may produce slightly different output depending on whether the review was created manually or via repository integration. In reviews created manually it is not always possible to filter-out merge changes, so sometimes they still could be displayed. Reviews created via integration have broader access to the repository and thus can exclude merge changes more thoroughly. The drawback of the latter approach is that the contents of individual merge commits will be displayed incorrectly.

Enable Next Page Scrolling in Diff Viewer

Specifies whether Diff Viewer should display the next page when reached the end of current page in document reviews.

Default Scale for Documents in Diff Viewer

Specifies the default zoom level when reviewing word-processing documents, presentations, PDF documents, images and vector graphics. You can set the scale to various percentages, Page Width or Full Page.

Revision Caption Pattern

Specifies what information should be displayed as the revision caption in the simple mode of revision selection of Diff Viewer. Any combination of the following is possible:

- Provider - Display provider type, like 'git', 'mercurial', 'none', 'local changes', and so on.
- Creation Time - Display item creation time.
- Item ID - Display unique item identifier. For example, commit ID.
- Description - Display item description. For example, commit message.

Ignore Whitespaces

Controls whether white-spaces are taken into account when showing differences.

This setting affects how line differences are displayed in Diff Viewer. Once enabled, line numbers and conversation position displayed in Diff Viewer may vary from line numbers and conversation position displayed in Review Summary Screen and reports.

Ignore Capitalization

Controls whether capitalization is taken into account when showing differences.

This setting affects how line differences are displayed in Diff Viewer. Once enabled, line numbers and conversation position displayed in Diff Viewer may vary from line numbers and conversation position displayed in Review Summary Screen and reports.

Ignore Sequence Number

Controls whether COBOL sequence numbers are taken into account when showing differences.

This setting affects how line differences are displayed in Diff Viewer. Once enabled, line numbers and conversation position displayed in Diff Viewer may vary from line numbers and conversation position displayed in Review Summary Screen and reports.

Review Subscriptions Preferences

Review Subscriptions allow you to automatically subscribe and be included in reviews with a preferred author. Under the "review creator" field, select the login name of the user to whose reviews you would like to be subscribed. If no authors are selected for a given review, the subscription will use the name of the review creator instead - unless the review creator is flagged as a system admin. Choose your role type (**Reviewer**, **Observer**, or **Moderator**) in the review. Keep in mind that actual role names may vary depending on your [role configuration](#) ²⁵⁵.

File Subscriptions Preferences

File Subscriptions allow you to automatically subscribe and be included in reviewers where a particular file is under a review. Choose your role type (**Reviewer**, **Observer**, or **Moderator**). Select an [Ant-style expression](#) as the pattern to match the file(s) of interest. The expression will be matched to the file path and repository name; it will not look for matches in the complete repository path with URL and other server descriptions. Ant-style expressions can include "*" to match any substring within a given directory, or "*" to match any substring of any length, ignoring directory separators. If possible, avoid beginning the pattern with wildcard characters as it can significantly decrease the performance of subscription processing.

Template Subscriptions Preferences

The screenshot shows the 'Template Subscriptions' tab in the web client. At the top, there are navigation tabs: Account, Notifications, Display, Review Subscriptions, File Subscriptions, **Template Subscriptions**, and Remote Accounts. Below the tabs is a yellow box with the text: 'Template-based subscriptions allow you to be automatically included in reviews having a particular templates. Select the name of review template to which you would like to be subscribed.' Below this is a form with two dropdown menus: 'Review Template:' set to 'Default' and 'My Role:' set to 'Reviewer'. To the right of these is a 'CREATE NEW' button.

Template Subscriptions allow you to automatically subscribe and be included in reviews having a particular template. Select the name of a template you would like to subscribe to in the "Review Template" field and specify your desired role type (**Reviewer**, **Observer**, or **Moderator**).

Remote Accounts Preferences

The screenshot shows the 'Remote Accounts Preferences' page for user 'JohnSmith'. The top navigation bar includes 'HOME', 'REVIEW', 'REPORTS', and 'ADMIN', along with a search bar and user profile icons. The 'SETTINGS' menu is highlighted. Below the navigation, the 'Remote Accounts' tab is selected. The page is divided into sections for different remote servers: 'FIN/finder-core', 'GitHub', and 'JohnSmithSB/HelloWorldApp'. Each section has a 'Github Username' field (all containing 'johnsmithsb') and 'SAVE' and 'REVERT' buttons.

Remote Accounts allow you to specify correspondence between your user name in Collaborator and your logins on various remote servers. These settings are used to match user names for Collaborator integrations with remote servers. See [Configuring User Remote Accounts](#) [776].

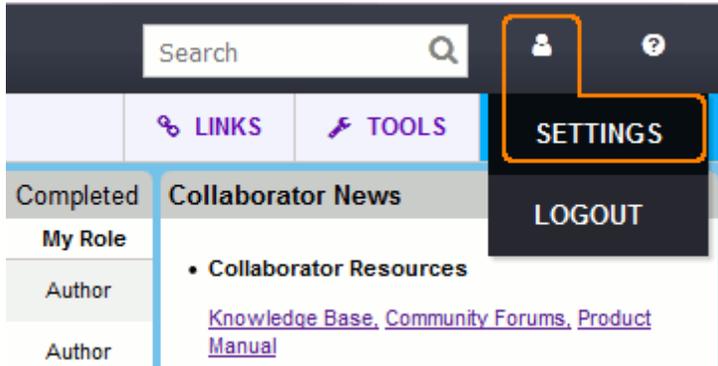
4.2.3 Notifications on Review Changes

You can subscribe to notifications about changes in reviews, in which you participate. Collaborator will notify you about changes in review statuses and activities of other participants. The notifications can come through email or RSS.

Subscribing to Email Notifications

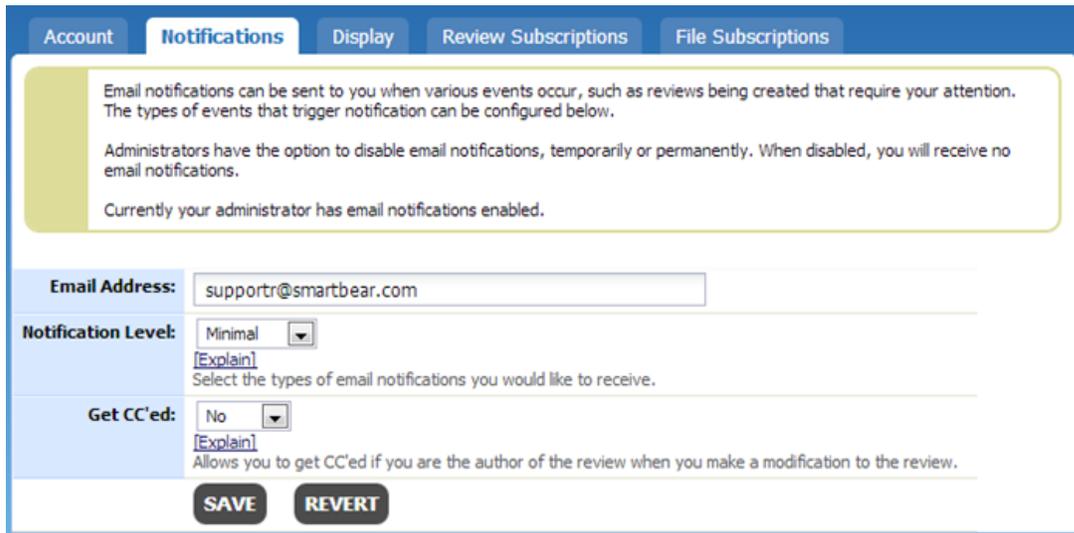
1. Log in to the Collaborator Web Client.

2. Click **Settings** on the home page.



This will open the **Preferences** page for your account.

3. Switch to the **Notifications** tab:

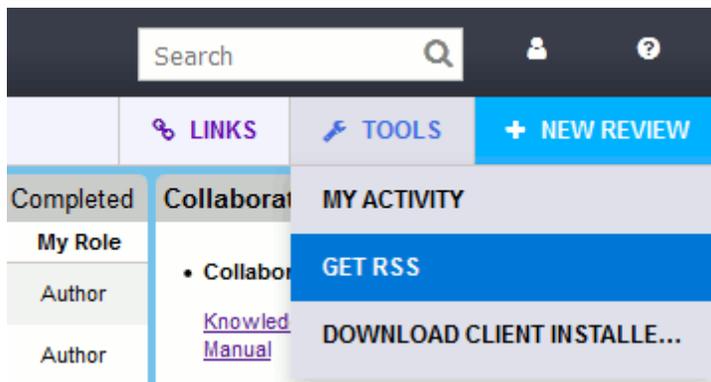


4. On the tab, check your email address and specify the desired notification level (see [below](#)³⁰⁵).

5. Click **Save** to apply the changes.

Subscribing to RSS Notifications

1. Log in to the Collaborator Web Client.
2. Click **Tools | Get RSS** in the home page menu:



Who Can Receive Notifications

Collaborator can send notifications both to review author as well as to other participants. The user needs to be in an active " [Wait](#)^[316]" state, which is an option at the very bottom of the [Review Summary](#)^[316] screen under "Next Steps". If a user is waiting for an action, they will be informed via email once that action takes place.

If you do not participate in a review, but want to be notified about its status, you can do the following:

- Ask the review author or administrator to add you into the review (they can add you as an observer).
- Create an [author-based subscription](#)^[301] which will automatically add you to the reviews created by the particular author.

By default, Collaborator notifies you about actions of other users on the review. To get all notifications, including ones for actions initiated by you, change your notification level setting to *All* (see [below](#)^[305]).

When Collaborator Sends Notifications

Collaborator sends notifications when an author, or a participant makes changes to a review, namely:

- When a review phase changes. Collaborator sends notifications when a review gets to the Annotating phase, or when it is Completed, Canceled or Rejected. Administrators can enable notifications for specific phases and disable them for others. (These notifications are sent both to active participants and to waiting participants.)
- When a review requires some action. For instance, Collaborator is clever enough to detect situations [when a review stalls](#)^[192], and notifies the participants that the review requires some action in order for it to be completed.
- When a participant adds a comment to the review, or creates a defect. (These notifications are sent to participants who are [waiting for review activity](#)^[316].)

- When participants add files to a review. (These notifications are sent to participants who are [waiting for review activity](#)^[316].)
- When you add new participants to or remove them from a review.
- When review goes to Inspection phase. (These notifications are sent to active and waiting participants.)

The entire list includes several dozens of events. You can control your overall notification level only (see [below](#)^[305]). Administrators can [enable or suppress specific notifications](#)^[262].

When Collaborator Does Not Send Notifications

- Collaborator does not send notifications for reviews that are in the Planning phase.
- Collaborator does not send repeated notifications. If several events occur within the review, then only the notification of the first event is sent. After which, the notification recipients have their state set to "Active". They will not receive further notifications, except for phase change notifications.
- By default, Collaborator does not send notifications to the user who changed a review. (However, this can be controlled by the [Notification Level](#)^[305] setting.)

See [below](#)^[306] for information on why you can miss a notification.

Setting the Desired Notification Level

1. Log in to the Collaborator Web Client (if you have not logged in yet).
2. Go to **Settings | Notifications**.
3. Choose the desired level from the **Notification Level** combo box. The following choices are possible:

None	No notifications except for those that the administrator sends explicitly.
Minimal	Default. You will get notifications on other review participants' activities on a review. "Non-activity" notifications will not be sent.
All	You will receive all the available notifications.

Changing Notification Message Text

Regular users are not allowed to customize the text of notification messages. You need to have administrator permissions in order to [customize the notification message text](#)^[262].

Why Do I Fail to Get Notifications?

Below are some typical reasons for this:

- A review is in the Planning phase (Collaborator does not send notifications for such reviews).
- You are active participant of the review.
- Your role in the review is not one that would receive the notification in question.
- You chose the *None* notification level in your Collaborator account's settings. Check the settings and select either Minimal or All level.
- You are the user who modified the review and your notification level is *Minimal* (default). By default, Collaborator does not notify the user, who made some change, about this change. If you want to receive such notifications, change your notification level to *All*.
- The administrator could disable notifications of certain types or disable all the notifications. Please ask the administrator to check their settings.
- Your email client can have active filter or anti-spam rules that delete the notification emails or move them to a Junk folder. Please check the rules of your email client.

4.3 Performing Reviews

This chapter describes creating, performing, and managing peer reviews.

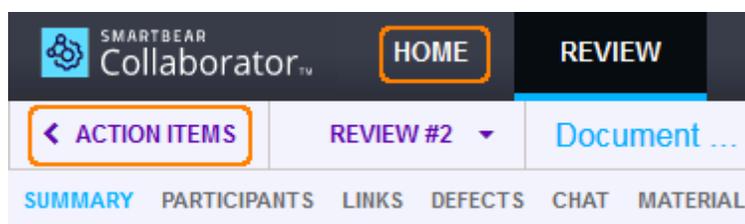
In This Section

- [Review Overview](#)^[17]
Describes a typical review and its phases.
- [Action Items](#)^[307]
Describes what are Action Items.
- [Creating a Review](#)^[309]
Explains how to create reviews.
- [Review Summary Screen](#)^[316]
Describes elements of the Review Summary screen.
- [Reviewing Materials](#)^[339]
Tells about reviewing different types of materials: text and code files, PDFs, word processing documents, spreadsheets, images and URLs.

- [Types of Review Comments and Defects](#) ³⁷⁸
Describes which types of global and context specific comments and defects you can use in Collaborator.
- [Review Chats, Comments and Defects](#) ³⁸⁵
Describes how to communicate during a review.

4.3.1 Action Items

Action Items are relevant, current things that you are included in. You can view your list of action items by clicking either **Action Items** or **Home** toolbar buttons:



You can select which action items are shown, by selecting the check-boxes for "Active", "Waiting" and/or "Closed". Selecting "Active" displays all reviews that require your immediate action to proceed. Selecting "Waiting" displays all reviews awaiting for rework, comments, signature or other participants. Selecting "Closed" will list reviews that have recently been completed, cancelled or rejected.

To filter some particular items, just specify the sought-for text in the filter box. This will display only the items that contain the specified text in their title, author, role or status.

Additionally, you can sort action items by clicking on the column labels, "Review", "Progress", "Author", "My Role", or "Deadline".

Action Items		Filter Review title, Author, Status, etc.	<input checked="" type="checkbox"/> Active 4	<input checked="" type="checkbox"/> Waiting 2	<input type="checkbox"/> Closed
Review	Progress	Author	My Role	Deadline	
Review #14175: "Review description of Oracle search settings" (overdue)	Waiting for comments	John Smith	Author	2019-02-10	
Review #14400: "Github pull request #1506. (add) COLLAB-4725. Problem: new client can't clearly understand what ..." (overdue)	Perform	Clive Sinclair	Stakeholder	2019-05-18	
Review #14493: "Github pull request #1560. COLLAB-4255 (fixed) Display LOC differences the same way it is displa..." (due today)	Perform	Hector Patton	Stakeholder	2019-06-27	
Review #14499: "Github pull request #1566. (fixed) COLLAB-5717 Moved back server url to review url for emails" (due in 1 day)	Perform	Lynn Carr	Stakeholder	2019-06-28	
Review #14502: "Licensing Staff" (due in 1 day)	Annotate Review	Hector Patton	Stakeholder	2019-06-28	
Review #14505: "What's New in 12.0" (due in 1 day)	Waiting for comments	John Smith	Author	2019-06-28	

Note: Action Items cannot display more than 1000 reviews.

Your Action Item list is updated immediately if anything changes. You can refresh this screen manually; the home page refreshes automatically every five minutes.

When you have an Action Item directing you to commit files, you remove it by clicking the review link on the left. Collaborator uses these Action Items to track whether review materials have been submitted to version control. If Collaborator does not have enough information to determine that the materials are already versioned it will create a reminder for you when the review is completed.

For recently completed reviews the Action Items list displays the "Dismiss" link to confirm that the review has been finished and dismiss it from the list of your active reviews.

Action Items are also visible in other clients: in [Tray Notifier](#)^[533], in [Eclipse Plug-in](#)^[476], in [Visual Studio Extension](#)^[516] and some others.

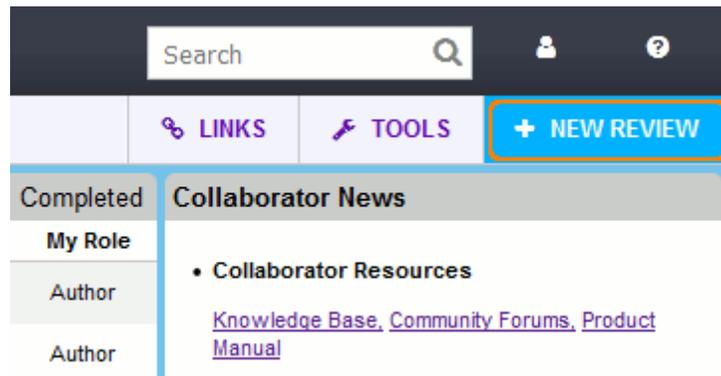
Progress values for action items:

Annotate Review	Action	you have been invited by the author to annotate the review
Commit files	Action	you need to commit your files to source control
Finish Creating	Action	you need to finish creating the review
Fix Configuration	Action	not review related - you need to finish filling out your user configuration information
Perform	Action	you need to perform the review
Respond to Comments	Action	you need to respond to comments in the review
Review cancelled	Non-Action	the review has been cancelled
Review completed	Non-Action	the review has been completed
Review rejected	Non-Action	the review has been rejected
Rework defects	Action	you need to rework the defects in the review
Sign review	Action	you need to sign the review
Waiting for annotation	Non-Action	you are waiting for others to annotate the review

Waiting for comments	Non-Action	you are waiting for others to make comments on the review
Waiting for defect rework	Non-Action	you are waiting for open defects in the review to be reworked
Waiting for other reviewers	Non-Action	you are waiting for others to complete the review
Waiting for signatures	Non-Action	you are waiting for others to sign the review

4.3.2 Creating a Review

To create a new review, click the **New Review** button on the Home screen:



You will see a Create Review Screen where you can specify information about the newly created review.

Tip: Alternatively, you may create a new review by copying any of existing reviews. This approach allows to retain some data (participant list, custom fields values, review materials) from the original review. See [Copying Previous Review](#)^[333] for details.

Creating a review involves the following steps:

- [Specify General Information](#)^[310]
- [Assign Review Participants](#)^[311]
- [Add Review Materials](#)^[312]
- [Start the Review Procedure](#)^[316]

Specifying general information about a review

In the **General Information** section you can specify the following data about a new review:

- **Review title** - a brief description for the review. The title is used all over the place -- in [Action Items](#)^[307], in notification emails, to web page titles, and so forth. Titles do not have to be unique in the system; reviews already have a unique ID that is assigned by the server.
- **Role** - your role in the current review. This field is read-only. Your and other participant's roles will be set through the Participants section described below.
- **Created** - a date when the review was created and a user who created it. This field is read-only and filled out automatically.
- **Group** - a group of users associated with the review. This field only appears when the [Groups feature](#)^[212] is enabled and you belong to some user group. Once you select a group, the participants list will be updated accordingly to show only those users belonging to the selected group. If you belong to only one user group, the group is set automatically. Changing the user group will cause you to lose any unsaved data applied to the review and may invalidate any saved data that is not applicable to the new group.
- **Template** - a template for the review. The template defines all the rules and workflow that governs the review. This includes custom fields for reviews and defects as well as the set of roles and rules for participants in the review. Your system administrator will have already [configured](#)^[230] the templates you can pick from and probably has some guidelines as to which templates should be used under which circumstances. If there is only one configured template, this template will be applied automatically.

- **Deadline** - a date when the review should be completed. This field only appears if a system administrator has set the [default review deadline](#)¹⁸¹ to a value other than 0. In that case, you will see the Deadline field with a default date that is calculated based on the value provided by the administrator. You can set the review deadline to any date that is on or after the current date. On the day before the deadline, participants will see a note in their action items that review is 'Due today'. This is intended to alert participants that if the review is not completed by midnight of the current day, it is overdue.
- **Completed on** - a date when the review was completed. This field is read-only and filled out automatically.
- **Restrict access** - allows you to limit those users who may access your review. By default, any user in the system can view and comment on any review at any time. However, there are circumstances where you may want to restrict viewing to those users specifically invited to the review, and this option enables you to do so. Please note that system administrators are able to view all reviews regardless of restricted access selections, and also have the ability to [require](#)¹⁰⁹ that all reviews be restricted. In such cases, you will not be given an option to restrict access.
- **Restrict uploads/deletions** - allows you to limit who can upload files into the review and delete files from the review. If this setting is enabled, only the creator and the administrators will be allowed to upload or delete files.
- **Overview** - a detailed description of the review. This field is optional and does not have to be filled out if you would like to leave it empty.
- **<Custom Fields>** - any other [review custom fields](#)²³⁵ that are enabled for current template.

Assigning review participants

The next step in creating a review is to invite people to the review, and give each of them a role to play. In the Participants section you need to select your role on this review and add other participants.

The screenshot shows the 'Participants' section of a review tool. At the top, there are navigation tabs: ACTION ITEMS, REVIEW #3, Verify foo function, ANNOTATE, INSPECT, and REVIEW ACTIONS. Below these are sub-tabs: SUMMARY, PARTICIPANTS (selected), LINKS, DEFECTS, CHAT, MATERIALS, PLANNING (active), ANNOTATION, INSPECTION, REWORK, and COMPLETED. The 'Participants' section is expanded, showing an 'Add Myself As' dropdown with 'Author' selected, and a 'Filter by' dropdown set to 'All Users'. The 'Add a New Participant' form includes a 'Participant' field with a search icon and the text 'Type to filter', and a 'Role' dropdown set to 'Reviewer'. An 'ADD' button is next to the role dropdown. To the right, 'Recent Participants' lists 'Clive Sinclair (Reviewer)'. A 'DONE EDITING' button is in the top right. Below the form is a 'Group by None' dropdown and buttons for 'JIRA Ticket All', 'iCal All', 'Email All', and 'Poke All'. A table lists the current participants:

Name	Role	State	Action	Remove
John Smith	Author	Active	[Email] [Phone] +13264655	[X]
Clive Sinclair	Reviewer	Active	[Email] [Phone]	[X]

The commonly-used roles are as follows:

- **Author:** Responsible for the files under review and probably responsible for fixing any defects that are found.
- **Reviewer:** Responsible for finding defects; is allowed to mark defects "fixed". The review is not finished until all reviewers approve it.
- **Observer:** Invited to the review but if all other participants are finished the review is complete. Useful when this user is not available just now and you do not want to wait for him to show up.
- **Moderator:** Controls the pace and flow of the review; coordinates other people and decides when the review changes phases.

Note, that the number of roles, their names and abilities are [configured by your administrator](#)^[253]. Therefore the list of user roles on your server may be different from the list above.

The **Filter By** drop-down is used to choose a group whose members are then listed in the **Participant** drop-down menu. If there are no groups [associated with the review](#)^[213], the **Filter By** drop-down is not displayed.

You can select each user and role individually through the **Participant** and **Role** drop-down menus, or start typing the name of the user in the appropriate field to narrow down the user list. User/role combinations you have used recently will also appear under "Recent Participants". This makes it easy and fast to select common combinations.

Each invitee can be assigned *only one* role. However, there is no limit on the number of invites, and, unless the administrator has [configured](#)^[253] things otherwise, there can be more than one user per role.

Adding materials to a review

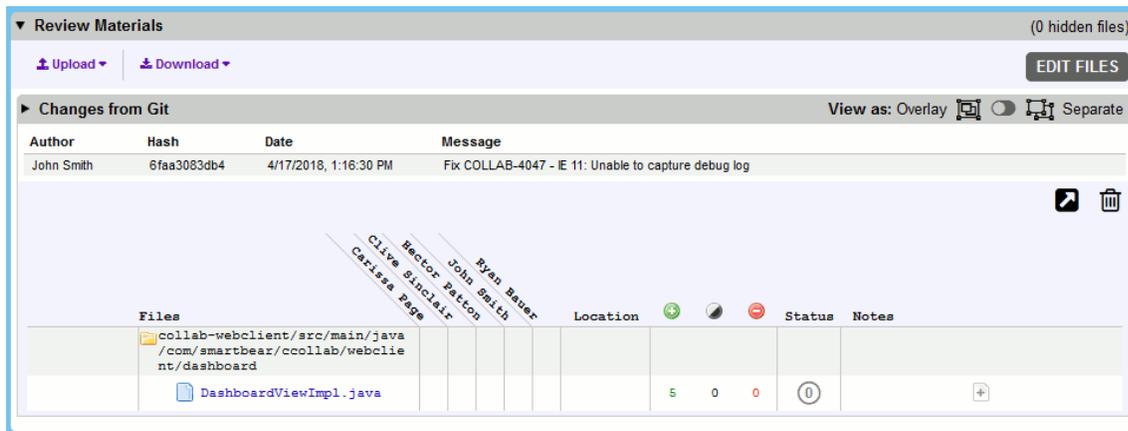
Review materials is what you are asking to review. Various types of materials can be uploaded into the review. This includes but is not limited to:

- Files controlled by a version control system: changes committed to a remote server (pushed commits), changes that are not yet committed to a server (un-pushed commits), local changes, differences between files, changelists, branches and so forth.
- Arbitrary files from your computer: [text files](#)^[351], [word processing documents](#)^[355], [spreadsheets](#)^[359], [presentations](#)^[363], [PDF documents](#)^[372], [Visio graphics](#)^[368], [images](#)^[369] and so on.

Once you have attached anything to a review, it will be listed in the Review Materials section.

Attaching review materials via desktop clients

The most common way to get files attached to a review is to use one of desktop clients: [Command-Line Client](#)^[445], [GUI Client](#)^[436], [Eclipse Plug-in](#)^[464], [Visual Studio Extension](#)^[503] or [Plug-ins for Perforce Visual Client](#)^[699]. All of these clients can integrate with version control system and/or easily upload local files or file-differences to the Collaborator server.



Local changes from files controlled by Git have been uploaded into this review via client.

Attaching review materials via Web Client

It is also possible to upload content directly from the Web Client. The advantage of performing this action from a web browser is that you do not need to install and configure the client.

From the Web Client you can upload the following types of content:

- Changes committed to a [pre-configured](#)^[194] version control system
- Arbitrary files from your computer

Attaching changelists via Web Client

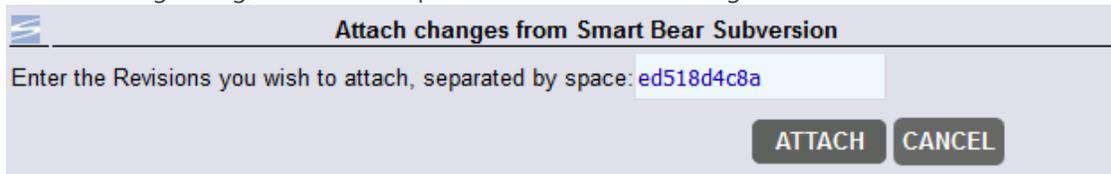
In order to perform these steps, your Collaborator server must be connected to a version control system as described in [Collaborator Administration - Version Control](#)^[194].

To add a changelist:

- Click the **Upload** button.
- Select the name of the connected version control system from the drop-down list:



- In the ensuing dialog, enter the unique IDs of the desired changelists and then click **Attach**.



You can attach any number of changelists to a single review. Also, you can attach changelists from different version control servers to a single review.

If there is an error retrieving that version or communicating with the server, you will see an error message.

Attaching Live URL's

You can attach live links to web sites. Attaching a live URL will display the live contents of the link during the review (rather than a local copy of the content). This feature is useful for accessing a document on a Wiki or document management system, particularly if you link to a specific version of that document.

To add a web link:

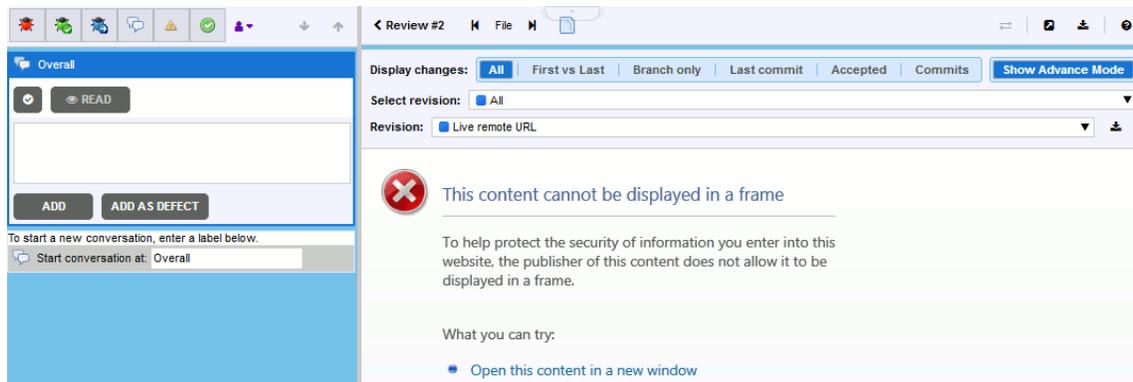
- Click the **Upload** button.
- Select **URL** from the drop-down list.
- In the ensuing dialog, enter the desired URL and then click **Attach**.



Notes:

- The URL must be a valid web URL, which should include the protocol specification (either http:// or https://).
- You will also see an error message if the specified URL is malformed.

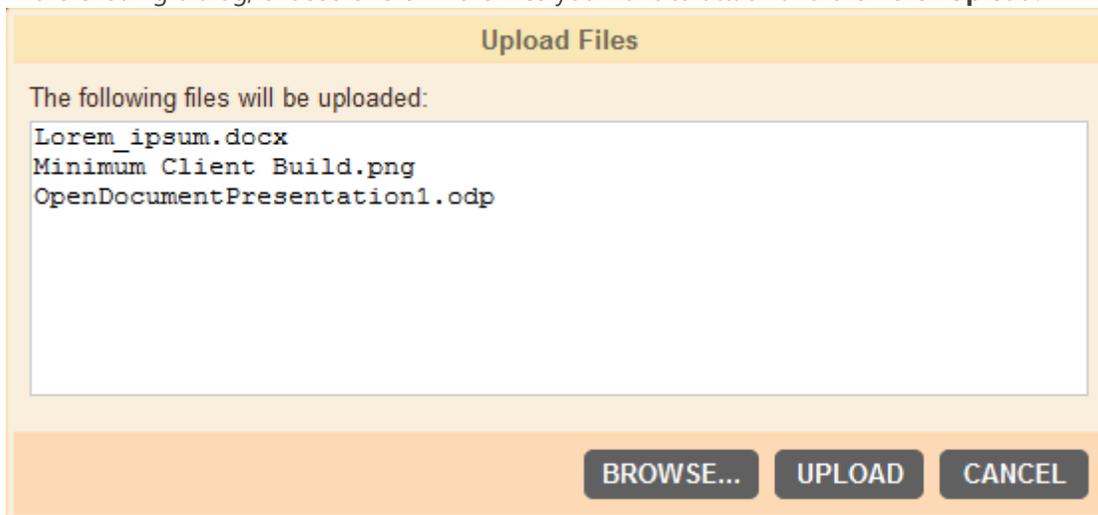
- Collaborator does not check whether the specified resource is available. In fact, since it is a link, the contents and availability of the document can change at any time.
- Collaborator displays the referred resource in a frame. The server can send requested contents with anti-framing headers. You will not see the referred content in this case. Depending on the web browser you use, you will see an empty frame or an error message saying that *the content cannot be displayed in a frame*:



Attaching arbitrary files

You can also attach any arbitrary file (images, PDFs, and binary file types) from your local hard drive:

- Click the **Upload** button.
- Select **Files** from the drop-down list.
- In the ensuing dialog, choose one or more files you want to attach and then click **Upload**.



Tip: Alternatively, you may just drag your local files and drop them to review web page.

Completing review creation

When the materials are uploaded, you can start the review immediately or keep it for annotating:

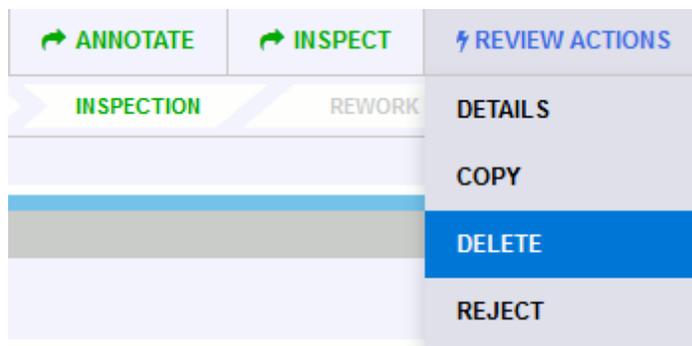


Click **Inspect** button in review header to start a review. Other participants will receive notifications about your new review, and it will be displayed in their [Action Items](#)³⁰⁷ list.

Alternatively, you can click **Annotate** button to apply the current changes, and proceed to optional Annotating phase. In this phase all participants that you have added will be notified about this review and will be invited to add their comments and review materials. The review will not begin until you select the **Inspect** button.

Deleting a review before it starts

To cancel a review before it begins, select **Review Actions | Delete** in review header:



4.3.3 Review Summary Screen

You will know that you are part of a review because it will show up in your [Action Items list](#)³⁰⁷, clicking a review in the list will take you to the Review Summary screen.

Action Items <input type="text" value="Filter Review title, Author, Status, etc."/>				
<input checked="" type="checkbox"/> Active 4 <input checked="" type="checkbox"/> Waiting 2 <input type="checkbox"/> Closed				
Review	Progress	Author	My Role	Deadline
Review #14175: "Review description of Oracle search settings" (overdue)	Waiting for comments	John Smith	Author	2019-02-10
Review #14400: "Github pull request #1506. (add) COLLAB-4725. Problem: new client can't clearly understand what ..." (overdue)	Perform	Clive Sinclair	Stakeholder	2019-05-18
Review #14493: "Github pull request #1560. COLLAB-4255 (fixed) Display LOC differences the same way it is displa..." (due today)	Perform	Hector Patton	Stakeholder	2019-06-27
Review #14499: "Github pull request #1566. (fixed) COLLAB-5717 Moved back s erver url to review url for emails" (due in 1 day)	Perform	Lynn Carr	Stakeholder	2019-06-28
Review #14502: "Licensing Staff" (due in 1 day)	Annotate Review	Hector Patton	Stakeholder	2019-06-28
Review #14505: "What's New in 12.0" (due in 1 day)	Waiting for comments	John Smith	Author	2019-06-28

The Review Summary Screen is displayed any time you are creating, editing or participating in a review. This page includes a fixed header-toolbar and a number of sections:

- [Header Toolbar](#)^[317]
- [Review Steps](#)^[319]
- [General Information](#)^[320]
- [Participants](#)^[322]
- [Participant Custom Fields](#)^[323]
- [Remote System Links](#)^[323]
- [Defect Log](#)^[324]
- [Overall Chat](#)^[326]
- [Review Materials](#)^[327]

Header Toolbar



The header of Review Summary Screen has fixed position and is always displayed whenever you scroll the screen up or down. It contains the following items:

Action items Returns back to Home page.

Review #	Displays the ID of current review. On mouse over, displays links to 10 most recent reviews, so you can navigate to another review directly.
<Title>	Displays the title of current review.
Annotate, Inspect, Wait, Send to Rework, Send to Completed	Moves the review from current phase to the next phase. The actual number of available actions depend on current review phase. See Review Steps ^[319] section below.
Review actions	<p>Displays a list of various actions available for the current review. The actions are:</p> <p>Details - Opens the Review Details Report^[412] on current review.</p> <p>Copy - Creates a new review on the basis of current review. You may copy list of participants, custom field values, review materials. See Copying Previous Review^[333].</p> <p>Delete - Deletes a review before it has started. Deleted review cannot be reactivated even by administrator.</p> <p>Displayed only on planning phase and only for review authors/creators. Enabled if authors are allowed to delete their reviews^[180].</p> <p>Cancel - Cancels an in-progress review. Canceled review can only be reactivated by administrator. Users will still be able to find cancelled reviews when searching and can view them in read-only mode.</p> <p>Displayed only for review authors/creators. Enabled if authors are allowed to cancel reviews^[180], otherwise only administrators can do this.</p> <p>Reject - Rejects an in-progress review. Could ask to specify reject reason^[182] in ensuing dialog. Rejected review cannot be reactivated even by administrator.</p> <p>Enabled if participants are allowed to reject reviews^[181], otherwise only administrators can do this.</p> <p>Reopen - Reopens a review after it was finished.</p> <p>Displayed for closed reviews. Enabled if participants are allowed to reopen reviews^[180], otherwise only administrators can do this.</p> <p>Archive - Creates an archive^[153] containing all the information related to the review.</p>

Enabled if participants are allowed to archive reviews¹⁷⁷⁾ and only on appropriate phases¹⁷⁷⁾ (on completed, cancelled or rejected phase, or on any phase).

**Summary,
Participants,
Links, Defects,
Chat, Materials**

Navigates to the respective section of the Review Summary Screen. Currently displayed section is underlined. Each section will be described below.

**Planning,
Annotation,
Inspection,
Rework,
Completed**

Displays the review workflow and phases. Current phase of the review is highlighted by solid-fill background.

Review Steps

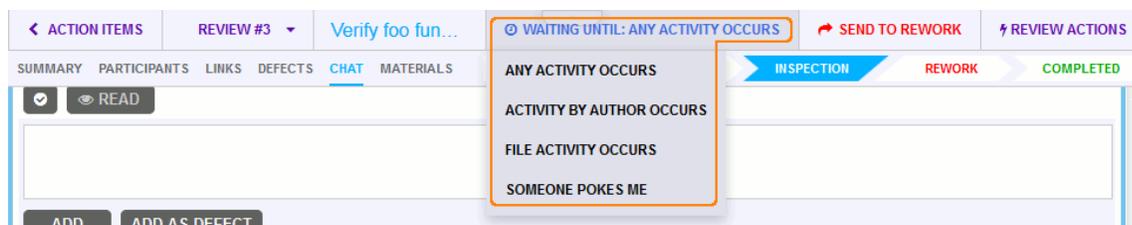
The Review Steps section of Review Summary header toolbar allows each review participant to move the review from one phase to another, or to wait in the current phase until certain specified activity occur. To learn more about review phases, see the Review Overview¹⁷⁷⁾ topic.

The choice options vary depending on the current and the expected phases of the review and the role of the participant. The choice options can be: Annotate, Inspect, Wait, Send to Rework, Send to Completed, Sign, Decline and so forth.

Pressing any of the Review Steps buttons (except for Wait) indicates that you have passed through the current review phase and moves the review to another phase.



Pressing the Wait button keeps the review in its current phase.



Wait Options

Most of the choices also allow to select in which case Collaborator will notify you of certain activities related to the given review. The action options are:

- **Any activity occurs** - any action that occurs in the review; for example, comments, file uploads, or added participants

- **Activity by author occurs** - any action that occurs in the review that is initiated by the author
- **File activity occurs** - any action that occurs to change the file content of the review; for example, the upload of a new file or the upload of a new version of an existing file
- **Someone pokes me** - only notifies you in the event that you are poked

General Information Section

The General Information section provides basic information about the review: current state, number of participants, uploaded files, chat messages, found defects and so on.

The screenshot shows the 'General Information' section for a review. At the top, it displays the review title 'Review #1: COLLAB-3987 Fixed Admin Message'. Below this, there is a status bar with 'CURRENT STATE: ACTIVE PARTICIPANT' on the left, 'INSPECTION' in the center, and statistics on the right: 5 Participants, 23 Files, 2 Chats, and 0 Defects. An 'EDIT' button is located on the far right of the status bar. The main content area lists the following details:

- Review Title:** [COLLAB-3987](#) Fixed Admin Message
- Role:** Reviewer
- Created:** on 2018-04-17 at 14:42 by John Smith
- Group:** All Users
- Template:** Default
- Deadline:** 2018-04-25
- Completed On:** N/A
- Restrict Access:** Anyone
- Restrict Uploads/Deletions:** No

An 'Overview' link is visible at the bottom left of the section.

This section includes the following fields:

- **Review title** - a brief description for the review. The title is used all over the place -- in [Action Items](#)^[307], in notification emails, to web page titles, and so forth. Titles do not have to be unique in the system; reviews already have a unique ID that is assigned by the server.
- **Role** - your role in the current review. This field is read-only. Your and other participant's roles will be set through the Participants section described below.
- **Created** - a date when the review was created and a user who created it. This field is read-only and filled out automatically.
- **Group** - a group of users associated with the review. This field only appears when the [Groups feature](#)^[212] is enabled and you belong to some user group. Once you select a group, the participants list will be updated accordingly to show only those users belonging to the selected group. If you belong to only one user group, the group is set automatically. Changing the user group will cause you to lose any unsaved data applied to the review and may invalidate any saved data that is not applicable to the new group.

- **Template** - a template for the review. The template defines all the rules and workflow that governs the review. This includes custom fields for reviews and defects as well as the set of roles and rules for participants in the review. Your system administrator will have already [configured](#) ^[230] the templates you can pick from and probably has some guidelines as to which templates should be used under which circumstances.
If there is only one configured template, this template will be applied automatically.
- **Deadline** - a date when the review should be completed. This field only appears if a system administrator has set the [default review deadline](#) ^[181] to a value other than 0. In that case, you will see the Deadline field with a default date that is calculated based on the value provided by the administrator. You can set the review deadline to any date that is on or after the current date. On the day before the deadline, participants will see a note in their action items that review is 'Due today'. This is intended to alert participants that if the review is not completed by midnight of the current day, it is overdue.
- **Completed on** - a date when the review was completed. This field is read-only and filled out automatically.
- **Restrict access** - allows you to limit those users who may access your review. By default, any user in the system can view and comment on any review at any time. However, there are circumstances where you may want to restrict viewing to those users specifically invited to the review, and this option enables you to do so. Please note that system administrators are able to view all reviews regardless of restricted access selections, and also have the ability to [require](#) ^[169] that all reviews be restricted. In such cases, you will not be given an option to restrict access.
- **Restrict uploads/deletions** - allows you to limit who can upload files into the review and delete files from the review. If this setting is enabled, only the creator and the administrators will be allowed to upload or delete files.
- **Overview** - a detailed description of the review. This field is optional and does not have to be filled out if you would like to leave it empty.
- **<Custom Fields>** - any other [review custom fields](#) ^[235] that are enabled for current template.

Unless you are creating a new review, most of section fields are in read-only mode. To modify field values, click **Edit**, make your corrections and then click **Done editing** to submit your changes.

Checklist Section

If your current review template uses [checklists](#) ^[250], the Checklist section is displayed. Checklists are typically used as reminders to look for items in a review that have been recurring problems.

▼ Checklist			
Status	Title	User	Date
<input type="checkbox"/>	Approved the changes	--	--
<input checked="" type="checkbox"/>	Check for performance bottlenecks	Clive Sinclair	4/20/18, 3:58 PM
<input checked="" type="checkbox"/>	Checked for duplicate code	Clive Sinclair	4/20/18, 3:58 PM
<input type="checkbox"/>	Checked security	--	--

You can sort checklists by Status, Title, User or Date. If checklists are mandatory, all items must be checked before the review can be approved. Checklists are managed in the admin section and added to review templates. Checklist items can also include checklist custom fields, if they exist and enabled for this checklist. Any user can check or uncheck items on the checklist and the system will record each event in the chat log while showing only the latest state on the actual checklist items.

Participants Section

The Participants section lists all participants in the review, their statuses, and their roles:

Name	Role	State	Action
John Smith	Author	Waiting	✉ 🌟 +13264655
Clive Sinclair	Reviewer	Approved	✉ 🌟
Hector Patton	Reviewer	Active	✉ 🌟
Keiko Giles	Observer	Active	✉ 🌟
Addison Gonzales	Observer	Active	✉ 🌟

The drop-down list at the top left allows you to select the way participants are grouped when displayed in this section. The options are "Group by Role", "Group by State" or "Group by None". The "Group by None" option lists all participants in the review in a single list which is sortable by clicking the headers for each column (name, role, state).

From the Participants section you can send different types of notifications to other participants. Collaborator has the following types of notifications:

- E-mail** - Launches your e-mail client and creates a draft letter which you can edit as you like and then send it.
 To send an e-mail notification to a specific participant, click the Email icon (✉) next to the desired participant.
 To send e-mail notifications to all participants, click the "Email All" button at the top of the Participants section.
- Poke** - Sends an e-mail with [auto-generated content](#)^[272]. Poke notifications may be useful when a certain participant has stalled the review or when you would like to invite a "finished"/"waiting" participant back into the review.
 To send poke notification to a specific participant, click the Poke icon (🌟) next to the desired participant.
 To send poke notifications to all participants, click the "Poke All" button at the top of the Participants section.

- Calendar** - Creates an email with a meeting request in iCalendar format. [Calendar notifications](#) [335] may be useful for scheduling formal meetings on review. To send Calendar notifications to all participants, click the "iCal All" button, in the ensuing Collaborator iCal Invite dialog specify proposed date and time and click Send.
- JIRA Ticket** - Creates a ticket in pre-configured JIRA project. See [Creating JIRA Tickets From Collaborator](#) [788] for details. To send JIRA notification to a specific participant, click the "Create JIRA ticket" next to the desired participant. To send JIRA notifications to all participants, click the "JIRA Ticket All" button at the top of the Participants section.

Participant Custom Fields Section

This section complements the Participants section and displays the values of [participant custom fields](#) [244] (if they are established and enabled for current review template).

Name	Notes	Rating
Clive Sinclair	Miscellaneous notes on review.	3 Please rate the importance of review subject.
John Smith	Miscellaneous notes on review.	3 Please rate the importance of review subject.
Hector Patton	Miscellaneous notes on review.	3 Please rate the importance of review subject.
Keiko Giles	Miscellaneous notes on review.	3 Please rate the importance of review subject.
Addison Gonzales	Miscellaneous notes on review.	3 Please rate the importance of review subject.

By default, participants can modify only their fields (yet, this is [configured](#) [244] per each custom field). Fields of other participants are displayed in read-only mode.

Remote System Links Section

If your current review template allows, the Remote System Links section is displayed. This section lists all pull requests, direct pushes and issue-tracking items linked with this review.

Remote System Links

Add Remote System Link:

Reference:

Remote System: SmartBear JIRA ADD

Link Remote Systems:
Enter Reference and click Add.

DONE EDITING

Remote System	Linked Item	Status	Action	Remove
SmartBear/collab-core (main repository)	PR#179: COLLAB-2727 Improve subscription feature for "Review Pools"	OPEN		
SmartBear JIRA	COLLAB-2727: Improve subscription feature for "Review Pools"	IN REVIEW		
SmartBear JIRA	COLLAB-2838: Groups need to be able to subscribe to file patterns	IN REVIEW		

The list automatically populates with the following items:

- Links to the remote repository for reviews created on pull requests and direct pushes to remote repositories. (If any of [repository hosting integrations](#)^[735] is established and running.)
- Links to issue tracking item identifiers that occur anywhere within the review (title, custom fields, comments and so on). (If any of [issue-tracking integrations](#)^[777] is established and running.)

The Remote System Links section also displays current statuses of linked items. Item statuses are updated upon webhook events (if a remote system supports webhooks), or periodically (default interval is every 2 minutes and can be adjusted via [VM option](#)^[1093]). Also, participants may refresh item status manually.

Besides that, participants may remove linked items or append links to issue-tracking items. Links from remote hosting systems, are only added automatically, they cannot be appended manually.

To append link to an issue-tracking item, do the following:

1. Type the item identifier (in JIRA it typically consists of project key and ordinal number, e.g. COLLAB-2838) into the **Reference** field,
2. Select the desired issue-tracking configuration in the **Remote System** combo box.
3. Press **Add**.

Defect Log Section

The Defect Log lists all defects found in the review:

Defect Log

Open (1)
 Fixed (0)
 External (0)

State	ID	Author	Date	Location	Origin	Text	Severity	Type
	1	Clive Sinclair	2018-04-19	foo.java, Line 198	foo.java, Line 198	Typo in word "pagination"	Minor	Text

Initially the log will be empty. As defects are created for the review as a whole or on individual files and line numbers, all defects are collected and listed here. For defects associated with particular files, links to that file and line number appear in the table for fast access. All defect custom fields are shown in the table.

When, as the reviewer, you have verified that a defect you found has been fixed, you can indicate this by clicking **Mark Fixed**.

The defect is then redrawn to reflect this:

▼ Defect Log									
State	ID	Author	Date	Location	Origin	Text	Severity	Type	
	1	Clive Sinclair	2018-04-19	foo.java, Line 198	foo.java, Line 198	Typo in word "pagination"	Minor	Text	

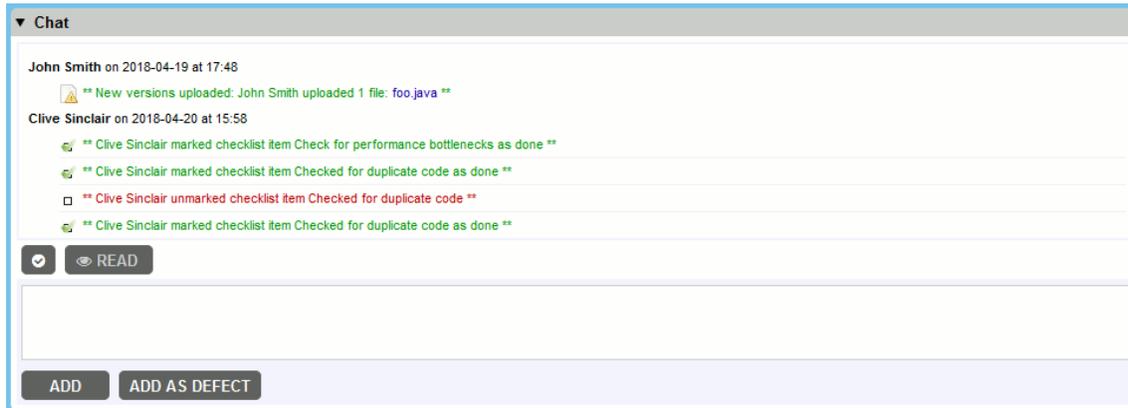
Only certain participants will be able to mark defects fixed. Which roles are allowed to do this depends on the [system configuration](#)^[253]. Also the user that created the defect is allowed to mark it fixed, and administrators are always allowed to mark any defect fixed.

Most of the time you will [create defects](#)^[390] and [mark them fixed](#)^[392] on individual lines (in text files) or on specific areas (in other types of documents).

To learn more on creating and editing defects, see the respective section of [Review Chats, Comments and Defects](#)^[390].

Overall Review Chat

You can chat with other users about this review as a whole, rather than [chatting on individual lines](#)³⁸⁵. Besides that, different helper events are reflected in chat, like uploading new files, links to pull requests, marking checklist items and so forth:



You can also use this section to enter defects related to the entire review. Clicking **Add as defect** button will change the interface to include a drop-down list that will allow you to specify defect information like Severity, Type and so on.

There is much to say about chat and defects, but this interface is identical to the one in the [Review Chats](#)³⁸⁵, so please see that section for details.

Review Materials Section

The screenshot shows the 'Review Materials' section with a toolbar at the top containing 'Upload', 'Download', and 'EDIT FILES' buttons. Below the toolbar is a 'Changes from Git' section with a table of commit messages. The main area displays a list of files with columns for 'Files', 'Location', 'Status', and 'Notes'. The files are organized into a tree structure, and each file has a row for 'Overall' status and specific line numbers with associated icons for comments and defects.

Author	Hash	Date	Message
John Smith	579c2972681	4/15/2018, 8:48:31 PM	COLLAB-3987 Fixed bug with black background on messages container
John Smith	7dd66687ad9	4/13/2018, 6:18:19 PM	Merge branch 'release-11.3.11300' into Fix_COLLAB-3987_Admin_Message ...
John Smith	5fa3350b17e	4/13/2018, 5:58:49 PM	COLLAB-3987 Fixed Admin Message

Files	Location	Status	Notes
collab-datamodel/src/main/java/com/smartbear/ccollab/datamodel			
manager			
DataPackageUtils.java		Overall: 0 3 0	
	Line 1381		
	Line 1386		
themes			
INebUIWindowPart.s.java		Overall: 0 3 0	
	Line 8		
	Line 59		
collab-installers/server-installer/src/install4j			
project.install4j		Overall: 3 1 0	Sample file note

The Review Materials section is the heart of the review: All files are displayed and participants can view content and differences and create comments and defects on specific lines or coordinates within a file.

Below, we will describe each of its elements in details.

The screenshot shows the 'Review Materials' section with a toolbar at the top containing 'Upload', 'Download', and 'EDIT FILES' buttons. Below the toolbar is a 'Changes from Git' section with a table of commit messages. The main area displays a list of files with columns for 'Files', 'Location', 'Status', and 'Notes'.

Toolbar

The toolbar of the Review Materials section holds the following items:



Upload

Displays a list of actions for uploading data to current review. Uploads can be disabled by [review creator](#)^[314] and by [administrator](#)^[177]. The actions are:

<Name of Version Control System> - Upload changes from one of [pre-configured](#)^[194] version control repositories.

Files - Upload arbitrary files from your computer.

Tip: Alternatively, you may just drag your local files and drop them to review web page.

URL - Attach live URL link.

Local Changes - Upload local files using the command-line client, GUI Client, or P4V integration.



Download

Displays a list of actions for downloading review materials to your local computer. The actions are:

Files - Download a ZIP file containing all files *with subdirectory structure preserved*

This means you can test the proposed file changes locally: Just download the ZIP file and expand it in your own development environment. This is also useful in the single-committer model for when you want to actually commit the changes. This can take the place of a patch file.

Warning: Downloading files to your local hard drive can have unintended consequences. Make sure you do not have changes of your own that you are overwriting. Also, remember that the author of these changes might not be synched to exactly the same versions of all files in version control, so if your local test fails this might be the reason.

You can also download individual file versions from the [Diff Viewer](#)³⁵¹, but the Download Files toolbar link is the more common way because you get all files at once.

Diff - Download a unified diff of all files in the review.

Edit files

Allows to change the list of review materials by hiding files that do not need to be reviewed. Hidden files will not be listed in Files section and their content will not be displayed in the Diff Viewer.

By default, only review authors can hide files, and they can perform this only in the Planning phase. To learn more about this feature, see [Hiding Files From Review](#)³³⁷.

View as

Allows to change the format of how the review materials are listed. If a review contains only one changelist, this command is inactive. The view options are:



Overlay (default) - Display all files from multiple changelists or uploads in one list.



Separate - Display files from each changelist or upload in a separate list.

Changes from Git				View as: Overlay Separate
Author	Hash	Date	Message	
John Smith	579c2972681	4/15/2018, 8:48:31 PM	COLLAB-3987 Fixed bug with black background on messages container	
John Smith	7dd66687ad9	4/13/2018, 6:18:19 PM	Merge branch 'release-11.3.11300' into Fix_COLLAB-3987_Admin_Message ...	
John Smith	5fa3350b17e	4/13/2018, 5:58:49 PM	COLLAB-3987 Fixed Admin Message	

The **Changelist info section** displays information about the uploaded files - who and when has submitted files, version control system, changelist IDs, commit messages, diff command and so on. Depending on how the materials were added, this information may vary a little. In Overlay view this section combines information from each changelist, while in Separate view this section precedes each particular changelist. If the commit message is too long, or consists of multiple lines, then the message is trimmed at 70 characters. To see the full message, press the ellipses button. The section has two more buttons:



**External
Diff**

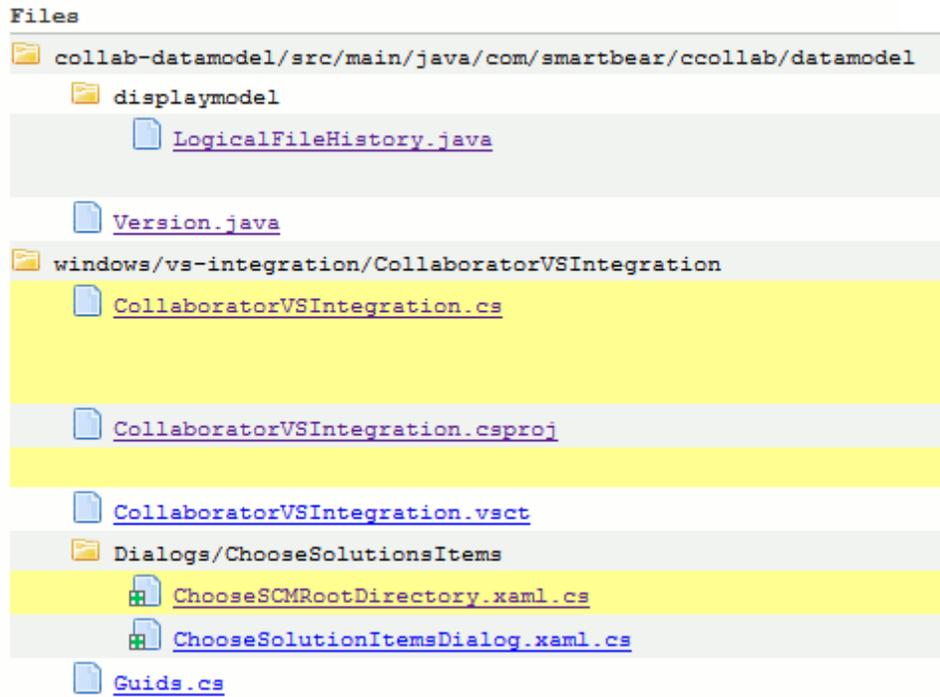
Download a diff file for viewing in an external Diff Viewer.



Delete

Deletes a changelist from the review materials. If you have multiple changelists in the review, you will need to go to separate view in order for the button to be enabled. You cannot delete an arbitrary file from a changelist. You can only delete the entire changelist. You cannot delete changelists that have comments to any file. Ability to delete review materials can be disabled by [review creator](#)^[31] and by [administrator](#)^[17].

To exclude unneeded files from review, we recommend hiding files rather than deleting a changelist. Read [Hiding Files From Review](#)^[33] for details.



File list

The **File list** shows the files in this review. This part of the screen may look different depending on the selected [View as](#)^[328] setting. The icon next to the file name indicates what operation was performed to the file.

Icon	Meaning
	File was modified
	File was added
	File was reverted before the review has started
	File was deleted
	File was reverted during the review

To open the content of a file in the [Diff Viewer](#)^[339] and view all comments associated with that file, just click its name in the file list. In Overlay mode of review materials, Diff Viewer will display overall changes made to the file as specified by the [Default Revision Comparison of Diff Viewer](#)^[298] setting, while in Separate mode it will display changes made by a particular changeset.

The **Conversation section** of the Files list shows where comments and defects have been made, their location within a file as well as whether these comments have been approved by other participants.

AG	HP	JS	RB	Location
				Overall
				Line 336
				Overall
				Overall
				Line 43
				Line 157

Conversation status icons and Location column

Icon	Meaning
	This participant has made a comment
	This participant has clicked " Mark Accepted " for file revision or comment. When the author uploads new revision of a file, the icon will change back to denoting that the participant has not yet approved this new revision.
	This participant has created a defect, which is currently "Open"
	This participant has created a defect, which is currently marked as "Fixed"
	This participant has created a defect, which is currently marked as "Tracked Externally"

The **Location** column indicates where within the file the conversation represented by this row is located. Yellow alert bubbles mean there is activity on that line that the current user has not yet marked read. Click on a line number to [open the content](#) of that file and view that conversation.

			Status	Notes
0	6	0		
3	10	0		Sample file note
57	4	0		

Metrics, Status and Notes columns

The next three columns show the number of text lines or lines of code (LOC) that have been added, changed, and deleted, with special cases for situations like added or deleted files.

Icon	Meaning
	The number of lines that have been added
	The number of lines that have been modified
	The number of lines that have been removed

The lines of code metrics (LOC metrics) are calculated only for source code and other text-based files. For other types of review materials (Word, Excel, PDF or Image files) the metrics are not calculated and return 0.

If the Overlay view is selected (default), the LOC metrics are calculated comparing the latest uploaded revision of file against the baseline revision of that file. Here, the baseline revision stands for the revision at the moment the review was created.

If the Separate view is selected, the LOC metrics are calculated comparing each individual file revision against its previous revision.

For reviews created by [pull requests](#)⁷³⁵, file changes made by merge commits (if any) are displayed in Separate view, but they are not taken into account when calculating overall LOC metrics.

The lines of code metrics and conversation positions are calculated including whitespace characters, letter-case changes and COBOL sequence numbers (if any). Diff Viewer has options to ignore those when displaying file difference. When these options are enabled, line numbers and conversation position displayed in Diff Viewer may vary from line numbers and conversation position displayed in Review Summary Screen and reports.

The **Status** column shows how many times the file has been reworked during this review. For reviews created by pull requests, file changes made by merge commits do not affect the overall rework count of a file.

The **Notes** column allows any user to annotate the files. To edit the note click in the note column. This is typically used for messages to all reviewers such as "review this file first", or "ignore this file".

Electronic Signatures

When [electronic signatures](#)¹⁸³ are enabled, users will see Sign and Decline buttons in the Review Steps section for completed reviews. Clicking either button requires a user to provide their login and password to complete the action. This makes the electronic signature compliant with FDA regulations.



When a reviewer signs or declines a review, the Review Steps section displays, "This review has been signed off" or "This review has been declined". The Chat section shows the signature information. Collaborator notes the name of the reviewer and the date and time the review was signed or declined.

For auditing purposes, you can go to the Review Details Report. Make sure that Comments Section Format is set to Display All Comments, and in the Overall Review Conversation section, you can see the signature information.

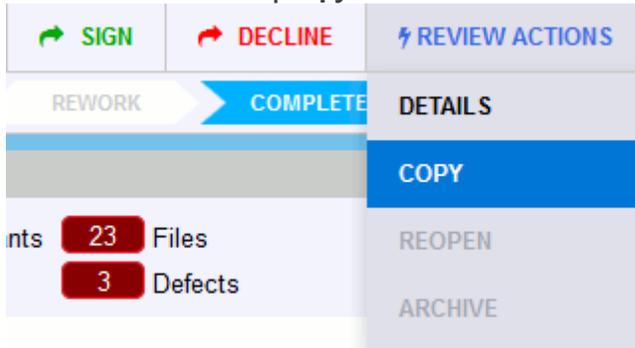
4.3.4 Copying Previous Review

You can create new reviews on the basis of a previous review. This allows to retain some information from the previous review (list of participants, custom field values, review materials and so forth).

To copy a review:

1. Open the review you want to copy in the [Review Summary Screen](#)³¹⁶.

2. Select **Review Actions | Copy** in review header:



3. In the ensuing pop-up dialog, specify title for the new review and select what information to copy from the previous review: Participants, Custom Fields, Participant Custom Fields, Materials, Remote System Links.

Note: When copying remote system links Collaborator does not copy links to closed items. Also, this functionality acts independently from the template's [Automatically Add Remote System Links](#)^[230] settings which parse the review's title, custom fields, comments for links to remote systems and append them to the review's Remote System Links section.

 A screenshot of a dialog box titled 'Collaborator Copy Review' with a close button '[X]' in the top right corner. The dialog contains the following fields and options:

- Title:** A text input field containing 'New Review'.
- Group:** A dropdown menu set to 'All Users'.
- Template:** A dropdown menu set to 'Default'.
- Restrict Access:** A dropdown menu set to 'Anyone'.
- Copy:** A section with five checkboxes:
 - Participants
 - Custom Fields
 - Participant Custom Fields
 - Materials
 - Remote System Links
- CREATE REVIEW**: A blue button at the bottom left.

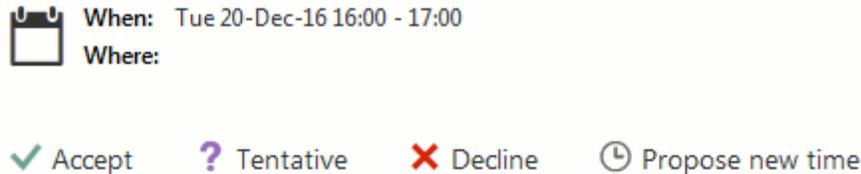
4. Click **Create Review**.

Once created, your existing subscriptions will apply to a new review. This may result in new participants be added to the review which were not part of the original review.

Alternatively, you can copy a previous review using command-line interface (`ccollab admin review copy`), using the JSON API (`ReviewService.copy`) or from the [Review Summary Screen](#)^[529] of Visual Studio Extension.

4.3.5 Sending Calendar Notifications

Calendar notifications may be useful for scheduling formal meetings on a particular review. Anyone of review participants may create an iCalendar invitation from the Review Summary Screen (see below). Once created, all participants of that review will receive email messages with a meeting proposal on specific date and time.



Review #2617: "Check VH"
 Author: John Smith
 Created: Fri Dec 09 09:37:20 GMT 2016
 Deadline: N/A
 Review Type: Default

Select this link to display or participate in the review:
<http://127.0.0.1:8080/ui#review:id=2>

This email is an automatic notification sent by Collaborator Enterprise.

Calendar invitation in Outlook

Technical Details

Calendar invitations are sent via email. Therefore, your Collaborator administrator should [configure](#)^[189] SMTP server settings and enable email notifications.

Calendar invitations use iCalendar format. To process them correctly, your email client should support this format. Otherwise, invitation will be interpreted as ordinary file attachment.

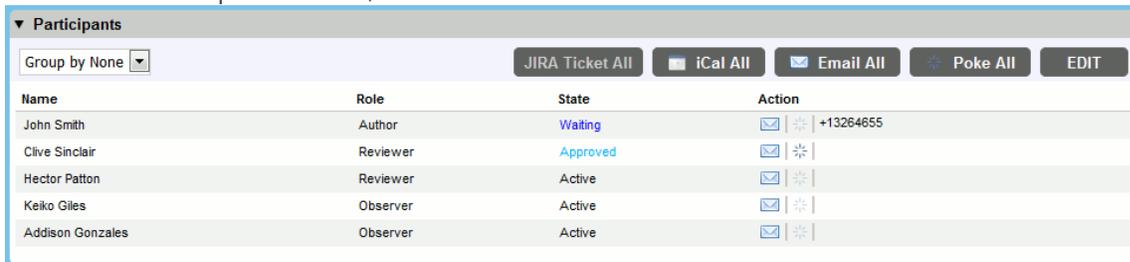
By default, the user who has created the invitation is assigned as the organizer of the meeting. This behaviour can be changed by the [Use iCal organizer](#)^[192] setting.

The text content of Calendar notifications is defined in the List Calendar Invite [notification template](#)^[262].

Creating Calendar Invitations

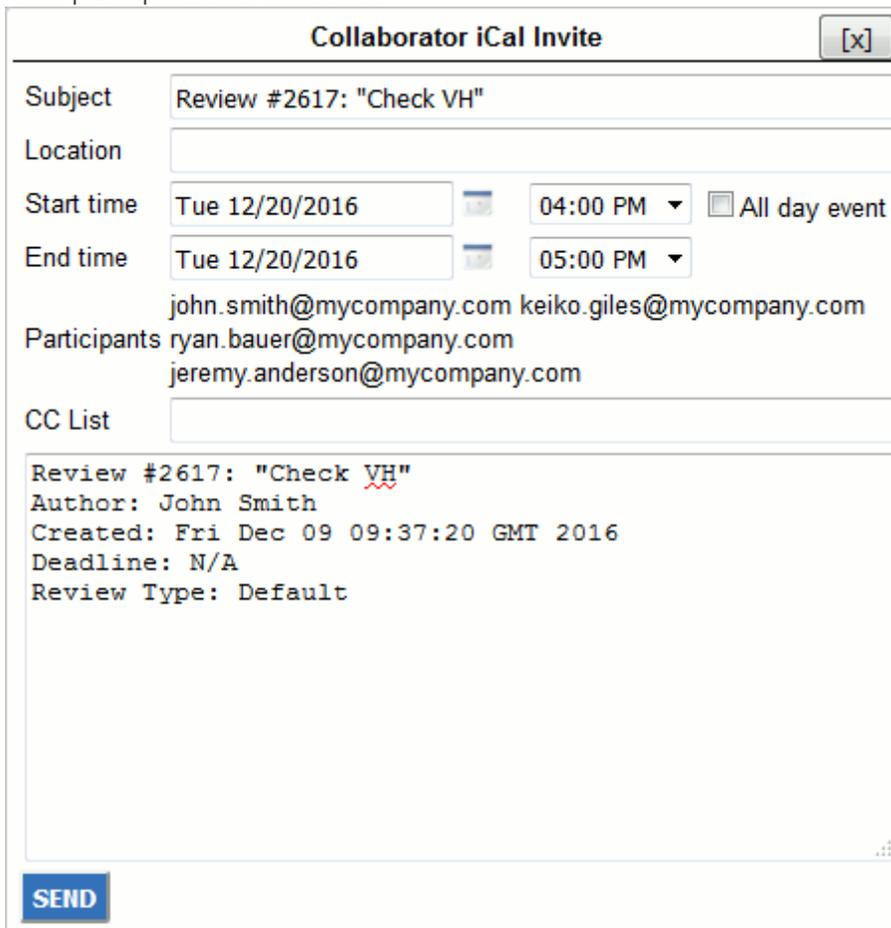
To create Calendar notifications:

1. Open desired review in the [Review Summary Screen](#) ³²²,
2. Scroll to the Participants section,



Name	Role	State	Action
John Smith	Author	Waiting	[Email] [Poke] +13264655
Clive Sinclair	Reviewer	Approved	[Email] [Poke]
Hector Patton	Reviewer	Active	[Email] [Poke]
Keiko Giles	Observer	Active	[Email] [Poke]
Addison Gonzales	Observer	Active	[Email] [Poke]

3. Click the "iCal All" button in the section's upper-left corner,
4. In the ensuing Collaborator iCal Invite dialog:
Specify date and time of event, (optionally) specify location, modify event description, add other participants and click Send.



Collaborator iCal Invite [x]

Subject: Review #2617: "Check VH"

Location:

Start time: Tue 12/20/2016 04:00 PM All day event

End time: Tue 12/20/2016 05:00 PM

Participants: john.smith@mycompany.com keiko.giles@mycompany.com
ryan.bauer@mycompany.com
jeremy.anderson@mycompany.com

CC List:

Review #2617: "Check VH"
Author: John Smith
Created: Fri Dec 09 09:37:20 GMT 2016
Deadline: N/A
Review Type: Default

SEND

4.3.6 Hiding Files From Review

Changelists may include files that do not necessarily need to be reviewed. However, since these files are still part of the atomic changelist, these files cannot be deleted from the review. In this case review authors (or all review participants, depending on the ["Who can hide files"](#)¹⁸² setting) can mark unneeded files as hidden.

- Hidden files are not displayed in [Diff Viewer](#)³³⁹. So reviewers will not be able to view their content, create comments or defects to these files.
- Hidden files are not listed in Overlay view mode of Review Summary Screen. In Separate view mode, hidden files are displayed, but will have a special mark.
- Hiding a particular revision of a file, will hide all other revisions of this file as well.

By default, you can hide files only in the Planning phase of the review. However, Collaborator administrators could enable this feature for the Annotating phase or for any other phase via the ["What phases can you hide/unhide files"](#)¹⁸² setting.

If a file has any comment or defect, it cannot be hidden.

To hide and unhide files from the review:

1. Open the review in the [Review Summary Screen](#)³¹⁶.
2. Scroll to the Review Materials section.
3. Click **Edit Files** button. This will display Hide check boxes in front of file names.

4. Select which files you want to hide or unhide.

The screenshot shows the 'MATERIALS' tab in a web client interface. The interface has a navigation bar with tabs: SUMMARY, PARTICIPANTS, LINKS, DEFECTS, CHAT, MATERIALS, and PLANNING. The 'PLANNING' tab is active. Below the navigation bar, there is a list of participants: Clive Sinclair, Keith Graham, and Carissa Page. The main content area shows a list of files and folders. The files are listed in a table with columns for 'Files', 'Hide', and 'Unhide'. The 'Hide' column has checkboxes, and the 'Unhide' column has checkboxes. The files listed are:

Files	Hide	Unhide
collab-datamodel/src/main/java/com/smartbear/ccollab/datamodel/themes		
WebUIActiveTheme.java	<input checked="" type="checkbox"/>	<input type="checkbox"/>
collab-webclient		
build.gradle	<input checked="" type="checkbox"/>	<input type="checkbox"/>
src/main/java/com/smartbear/ccollab/webclient		
common		
convo		
convodeflectlog		
ConvoDefectLogViewImpl.java	<input type="checkbox"/>	<input type="checkbox"/>
ConvoDefectLogViewImpl.ui.xml	<input type="checkbox"/>	<input type="checkbox"/>
convolog		
ConvoLogViewImpl.java	<input type="checkbox"/>	<input type="checkbox"/>
ConvoLogViewImpl.ui.xml	<input type="checkbox"/>	<input type="checkbox"/>

5. Click **Done Editing Files** when finished.

Once a file is hidden or unhidden, a comment is made in the Chat section which says that a particular file was excluded or included in the review. Also the counter of hidden files is incremented or decremented, respectively.

The screenshot shows the 'Chat' section in a web client interface. The chat shows a message from Clive Sinclair on 2018-04-23 at 15:10, stating that two files were hidden: 'collab-datamodel/src/main/java/com/smartbear/ccollab/datamodel/themes/WebUIActiveTheme.java' and 'collab-webclient/build.gradle'. The chat also shows a 'READ' button and an 'ADD AS DEFECT' button. Below the chat, there is a 'Review Materials' section with a counter for '(2 hidden files)' and an 'EDIT FILES' button.

Once a subsequent changelist is uploaded and a hidden file was changed, it may remain hidden (default) or become visible depending on the "[When a hidden file changes](#)"^[182] setting.

4.3.7 Reviewing Materials

The Review Materials screen, or the Diff Viewer, is where most of the reviewing takes place. The commenting format and functionality will differ depending on what file type you are reviewing. We support the following file types:

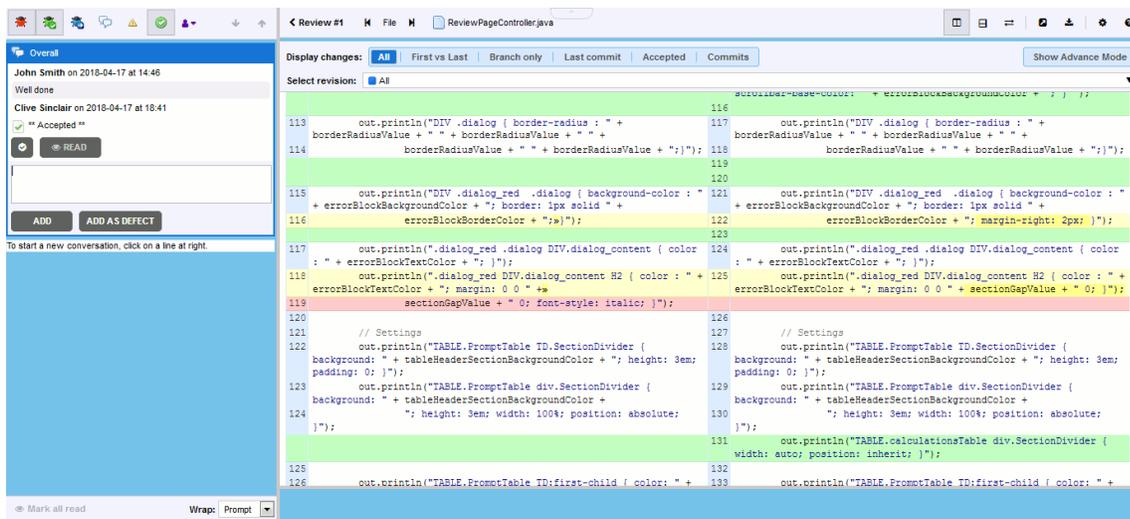
- [Text files](#)^[351] (including source code and any other text-based formats)
- [Word processing documents](#)^[355] (.DOC, .DOCX, .RTF, .DOCM, .DOT, .DOTM, .DOTX, .ODT and .OTT)
- [Spreadsheets](#)^[359] (.XLS, .XLSX, .XLSB, .XLSM, .XLTM, .XLTX and .ODS)
- [Presentations](#)^[363] (.PPT, .PPTX, .POT, .POTM, .POTX, .PPS, .PPSM, .PPSX, .PPTM and .ODP)
- [Visio vector graphics](#)^[366] (.VDW, .VDX, .VSD, .VSDM, .VSDX, .VSS, .VSSM, .VSSX, .VST, .VSTM, .VSTX, .VSX and .VTX)
- [Images](#)^[369] (.JPG, .JPEG, .PNG, .GIF and .BMP)
- [PDF documents](#)^[372] (.PDF, and any other document types converted to PDF format)
- [URLs](#)^[376] (HTTP and HTTPS)

Important: Document reviews (except for text-based and image files) is only supported on 64-bit Collaborator servers. On 32-bit platforms, Collaborator may fail to process the documents due to insufficient memory.

4.3.7.1 Diff Viewer Overview

The Review Materials screen or Diff Viewer is where most of the reviewing takes place. It shows which exact changes were made to the review materials, how a file has changed from one revision to another.

Diff Viewer includes a number of configuration and display options that may change depending on the specific type of file that is being reviewed.



The appearance of the Diff Viewer when reviewing source code files

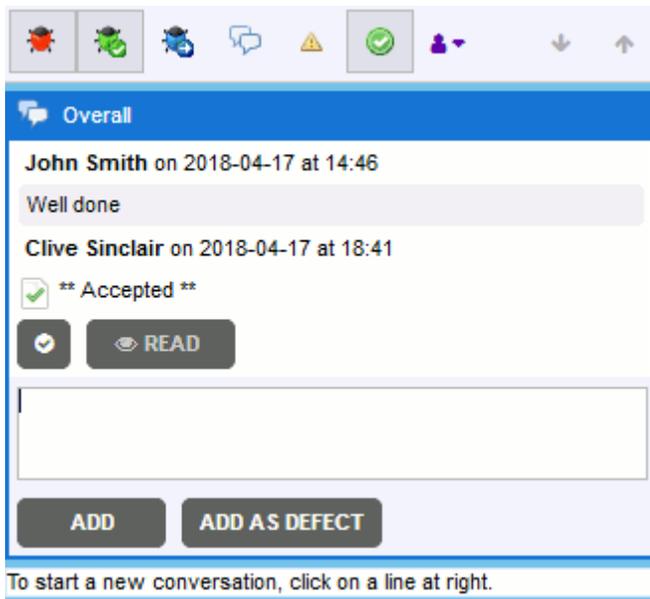
The Diff Viewer is divided into a number of sections:

- [Chat Pane and associated toolbar options](#)^[340]
- [Diff Viewer Toolbar](#)^[342] (Which includes the [Display Options pane](#)^[346])
- [Diff Viewer Header](#)^[344]
- Diff Viewer Content (The actual content under review)

NOTE: The Diff Viewer opens in the same window and tab, when launched from the Review Summary screen. To open it in a new window, you can Shift+click the link.

Chat Pane

On the left of the main Diff Viewer page, there is a pane for chat threads. This pane allows you to add both global and content-specific comments and defects to the document you are reviewing. **Comments** may hold any information concerning the review: a question, a clarification, a remark, an encouragement, whatever else. **Defects** indicate a problem that needs to be fixed. To learn more about global and content-specific comments and defects, see [Types of Review Comments and Defects](#)^[378].



At the top of the chat pane, you will find a series of buttons that control whether or not certain types of comments appear in full or in collapsed states (to save viewing space). Note that defects, count as unread comments until they are accepted/marked read.



The first three icons control whether defects appear collapsed or expanded in the chat panel. The red bug controls the display for open defects, the green bug controls the display for fixed defects and the blue bug controls the display for defects tracked externally.

The next four icons control the display of non-defect conversations. The white conversation bubble controls the display for all comments. The yellow hazard sign controls the display for unread comments. The green checkmark controls the display for conversations that have been marked accepted. The pushpin icon controls whether to display markers for coordinate comments within word-processing documents, presentations, PDF documents, images and vector graphics. The user icon with a drop-down specifies whether to display comments and defects from all participants or just from the selected participant.

The next two icons allow navigating to the previous or next comment or defect within the current document.

To learn how to make conversation during the review, see [Types of Review Comments and Defects](#)^[378] and [Review Chats, Comments and Defects](#)^[385] topics.

Diff Viewer Toolbar

The toolbar at the top of the Diff Viewer includes options for altering the display of information and navigation through documents within the review.



Back to review summary

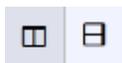
Returns back to review summary page.

File Navigation

Navigate to the previous or next file in the review, respectively.

File Name

Displays the name of current file.



Orientation

Specifies whether the Diff Viewer displays in side-by-side mode or over/under mode.

- When enabled, Before and After panes are displayed over/under one another.
- When disabled, Before and After panes are displayed side-by-side.

This button is displayed only for text-based formats and images.



Display Order

Determines which pane is considered the 'After' pane, for the purposes of highlighting additions and deletions.

- When enabled, the After pane is the leftmost panel in side-by-side mode and the uppermost panel in over/under mode
- When disabled, the After pane is the rightmost panel in side-by-side mode and the undermost panel in over/under mode



Toggles between adding coordinate comments and panning the file contents.

- When enabled, a single left click within a file contents will add a coordinate comment at specified position.
- When disabled, dragging the mouse pointer will pan the contents of the file.

This button is displayed only for word-processing documents, presentations, PDF documents, images and vector graphics.



Toggles between zooming and scrolling the file contents.

- When enabled, rotating mouse wheel will zoom the file contents in and out.
- When disabled, rotating mouse wheel will scroll the file contents up and down.

This button is displayed only for word-processing documents, presentations, PDF documents, images and vector graphics.



Locks mouse action for both panes.

- When enabled, both Before and After panes will react on mouse actions (panning, scrolling, zooming) simultaneously.
- When disabled, mouse actions (panning, scrolling, zooming) will affect only the pane a mouse hovers on.

This button is displayed only for word-processing documents, presentations, PDF documents, images and vector graphics.

Zoom Level

Specifies the zoom level for both Before and After panes. You can set the scale to various percentages, Page Width or Full Page.

This button is displayed only for word-processing documents, presentations, PDF documents, images and vector graphics.

Search

Performs a full-text search within the current document. Type in the desired text and press Enter.

This button is displayed only for Word processing and PDF documents, presentations and vector graphics.



External Diff Viewer

Launches the current document review in an external diff viewer.



Download Diff

Downloads a Diff file of the current document.



Display Options

Opens the [Display Options panel](#)³⁴⁶ which controls how Diff Viewer should display various data.

This button is displayed only for text-based formats and for Excel, Word and PDF documents.

**Help**

Opens the help menu with descriptions of color-code legend, keyboard shortcuts, and links to documentation.

Diff Viewer Header

The content of the header varies depending on the type of file being reviewed, current revision selection mode, and content orientation.

Diff Viewer header in simple revision selection mode

Diff Viewer header in expert revision selection mode

Display changes

Allows to select which file revisions (if available) will be compared.

The available options are:

- *All* - Compare the current revision of a file against its *base revision* - that is, a state of file before any changes related to current review have been made. For pre-commit reviews, base revision is the revision that you checked out from the repository. For post-commit reviews, base revision is the revision that precedes your commit.
- *First vs Last* - Compare the most recent revision of a file against its first revision that was uploaded during this review.
- *Branch only* - Compare the current revision of a file against its base revision excluding changes merged from other branches.
- *Last commit* - Compare the current revision of a file and its previous revision.

- *Accepted* - Compare the current revision of a file against its latest [accepted revision](#)^[388]. During the review, participants may accept some particular revisions of a file to denote that they agree with the changes. Uploading a further revision of that file clears the Accepted mark. If a participant has not accepted any revision yet, then compares the current revision of a file against its base revision.
- *Commits* - Compare the most recent revision against any arbitrary revision chosen in the **Select revision** drop-down.

The "Branch only" mode may produce slightly different output depending on whether the review was created manually or via repository integration. In reviews created manually it is not always possible to filter-out merge changes, so sometimes they still could be displayed. Reviews created via integration have broader access to the repository and thus can exclude merge changes more thoroughly. The drawback of the latter approach is that the contents of individual merge commits will be displayed incorrectly.

Show Advanced Mode

Toggles between simple and advanced modes of revision selection.

Select revision

Displays the current revision selection mode, or the file revision to be compared when the **Display changes** selector is set to *Commits*. Each file revision is identified according to the [Revision Caption Pattern](#)^[300] setting and may include provider type, creation time, item identifier and description.

After

Visible in advanced revision selection mode.

Specifies the file revision to be displayed in the 'After' pane. Each file revision is identified by its SHA-1 hash value. Additionally, the file folder icon adjacent to this field can be used to download the selected revision of the file.

When you select the same file revision in 'Before' and 'After' drop-downs, Diff Viewer will unite the 'Before' and 'After' panes. In this case, added file revisions will have green background, while removed file revisions will have red background.

Before

Visible in advanced revision selection mode.

Specifies the file revision to be displayed in the 'Before' pane. Each file revision is identified by its SHA-1 hash value. Additionally, the file folder icon adjacent to this field can be used to download the selected revision of the file.

When you select the same file revision in 'Before' and 'After' drop-downs, Diff Viewer will unite the 'Before' and 'After' panes. In this case, added file revisions will have green background, while removed file revisions will have red background.

File revisions in Select revision, Before and After drop-down lists are further identified by an icon which appears adjacent to the revision number denoting:

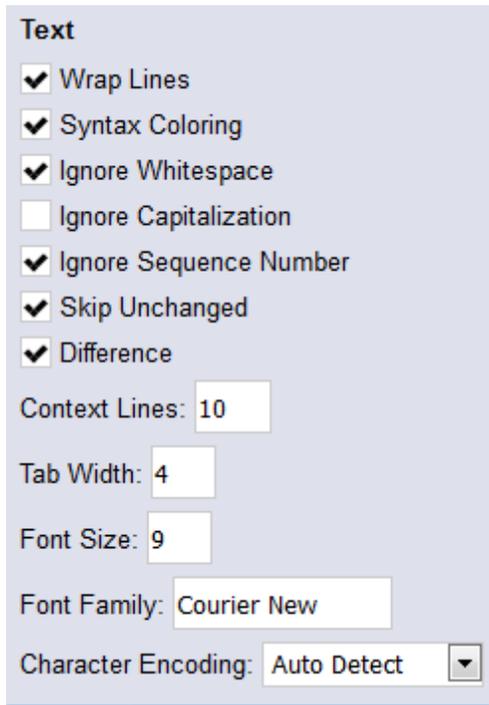
Icon shape:		Square shape indicates that file was uploaded from any source control system (within changelist, commit, diff and so on).
		Circle shape indicates that file was uploaded from local storage without any versioning.
Icon color:		Green color indicates that file was added.
		Blue color indicates means that file was modified.
		Red color indicates that file was removed.
Icon checkmark:		Unchecked indicates that file change was not accepted yet.
		Checked indicates that file change was accepted.

Display Options Panel

The Display Options panel contains various options that determine what data is displayed by the Diff Viewer and how it is displayed. This panel is available only for text-based formats and for Excel, Word and PDF documents.

The list of panel option varies, depending on a format of the current file:

Text-based formats



Text

- Wrap Lines
- Syntax Coloring
- Ignore Whitespace
- Ignore Capitalization
- Ignore Sequence Number
- Skip Unchanged
- Difference

Context Lines:

Tab Width:

Font Size:

Font Family:

Character Encoding: ▼

Wrap Lines

Controls whether lines of text are wrapped to the width of the pane.

NOTE: When 'Wrap Lines' is not selected, an option will appear at the bottom of the text section to enable/disable synchronized scrolling of the panes.

Syntax Coloring

Controls whether syntax-specific coloring is used, when supported.

Ignore Whitespace

Controls whether white-spaces are taken into account when showing differences.

This setting affects how line differences are displayed in Diff Viewer. Once enabled, line numbers and conversation position displayed in Diff Viewer may vary from line numbers and conversation position displayed in Review Summary Screen and reports.

Ignore Capitalization

Controls whether capitalization is taken into account when showing differences.

This setting affects how line differences are displayed in Diff Viewer. Once enabled, line numbers and conversation position displayed in Diff Viewer may vary from line numbers and conversation position displayed in Review Summary Screen and reports.

Ignore Sequence Number

Controls whether COBOL sequence numbers are taken into account when showing differences.

This setting affects how line differences are displayed in Diff Viewer. Once enabled, line numbers and conversation position displayed in Diff Viewer may vary from line numbers and conversation position displayed in Review Summary Screen and reports.

Skip Unchanged

Determines whether large blocks of unchanged content is displayed. These gaps will appear, in the Diff Viewer as 'Skipping X lines...' and will include the two links labeled 'More', which will allow you to see more of this skipped content.

Difference

Enables highlighting of additions, deletions and differences in the viewer.

Context Lines

Defines the number of lines to show before and after the actual changes. So that you can better understand the context of changes performed.

Tab Width

Sets the number of spaces per tab.

Font Size

Allows customization of the font size.

Font Family

Allows customization of the font family

Character Encoding

Specifies the character encoding for the file.

Spreadsheets

Spreadsheet

- Evaluate Formulas
- Ignore Empty Cells
- Difference

Evaluate Formulas

Specifies whether to evaluate formulas and display the resulting value, or to display the formula itself.

Ignore Empty Cells

Specifies whether to ignore empty cells when viewing differences.

Difference

Enables highlighting of additions, deletions and differences in the viewer.

Word processing documents, PDF documents, presentations

Document

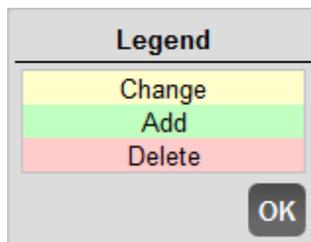
- Difference

Difference

Enables highlighting of additions, deletions and differences in the viewer.

Legends

The differences are noticeably highlighted and color coded as explained by the legend: Changes appear in a yellow, additions are green and deletions are red.



Keyboard Shortcuts

The Diff Viewer is completely navigable from the keyboard. You can move around the file, jump to changes, and make comments and defects. To get the list of keyboard shortcuts, click the "Help" link in the menu bar, then "Keyboard Shortcuts".

Keyboard Shortcuts	
Key	Action
Alt-P	Mouse Pointer
Alt-L	Lock
Alt-Z	Drag Or Zoom
Ctrl-> or F8	Next Location
Ctrl-< or F7	Previous Location
Ctrl-[Previous File
Ctrl-]	Next File
Ctrl-Shift->	Next Line
Ctrl-Shift-<	Previous Line
Ctrl-"	Create Comment
Ctrl-Shift-"	Create Defect
Ctrl-Home	Go To First Page
Ctrl-End	Go To Last Page
Page Up	Previous Page
Page Down	Next Page

OK

Shortcuts with ALT key are not supported on Apple Macintosh.

Limitations

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- **Subversion, Perforce, TFS, RTC, Git:** If you have "gaps" while adding subsequent atomic changelists to the same review. For example, add changelists 1, 2, and 4, but forget to add changelist 3.
- **Perforce, TFS, RTC:** If you add pending changelists from different workspaces to the same review.
- **Git:** If you add changelists from different branches or repositories to the same review.
- **RTC:** If you add changelists from different workspaces or streams to the same review.
- **All source control systems:** If you add several diffs (non atomic changelists) to the same review.

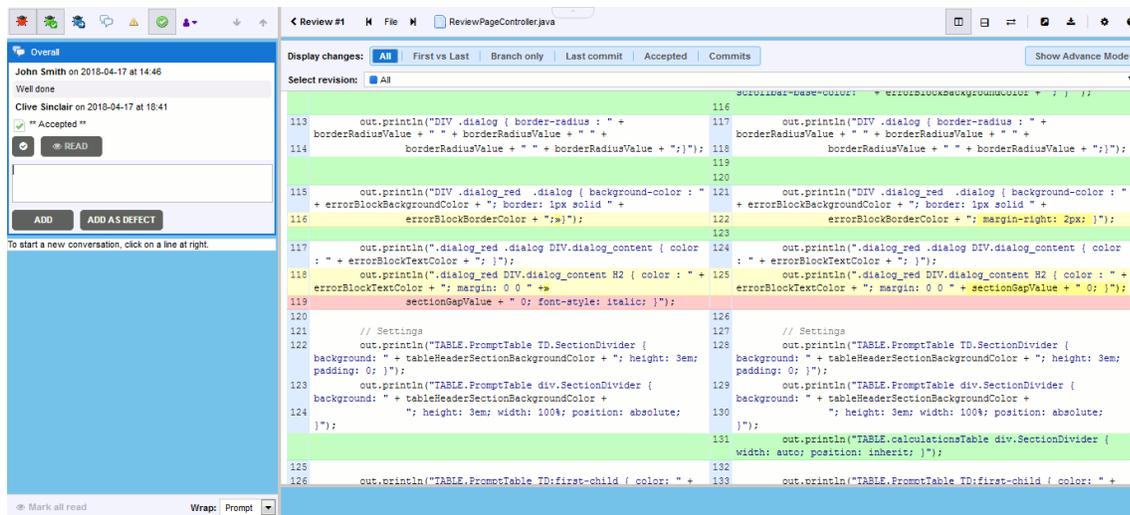
4.3.7.2 Reviewing Text Files

When reviewing text files (including source code and any other text-based formats), the review screen becomes the Diff Viewer. Here, you can see file content, differences with previous versions of the file, and all comments and defects for the file all on one screen.

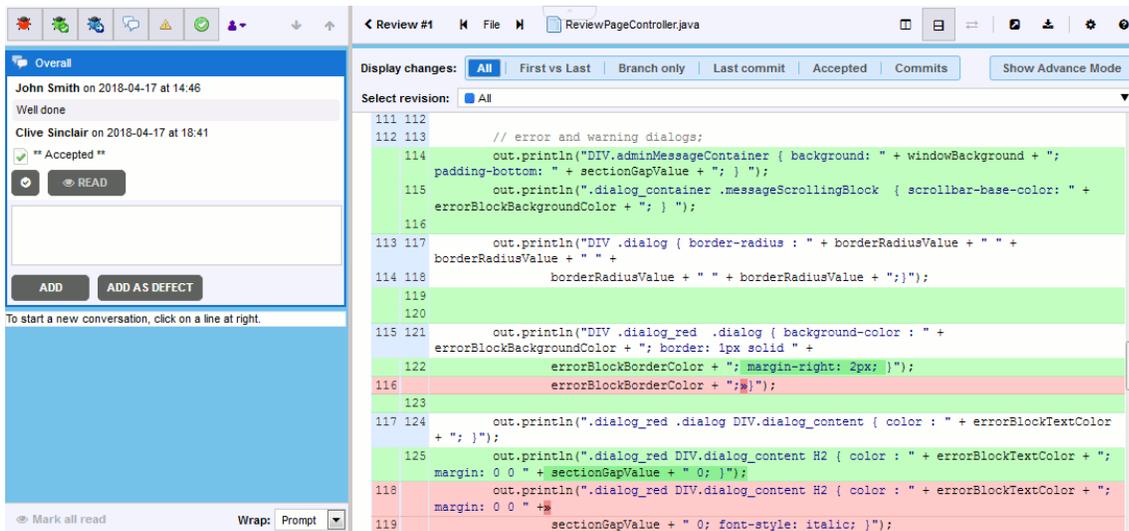
Viewing Differences

The Collaborator diff view displays any text either side-by-side or in an over-under orientation. Both views have all the same options and functionality, so users should feel free to use whatever is most comfortable. Since differences in the content could affect users' orientation preference,

changing the orientation is simple, just click the  **Orientation** button on the toolbar.



Standard View with Side-by-Side Orientation



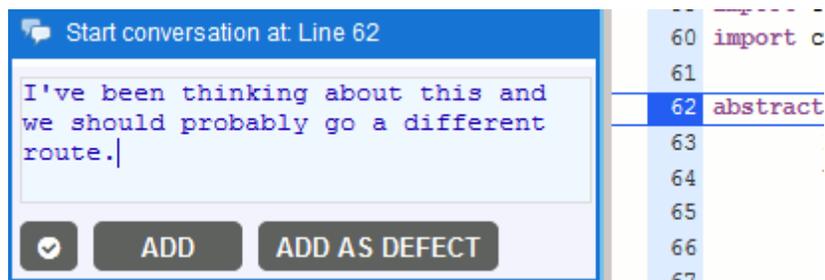
Standard View with Over/Under Orientation

The over and under orientation merges both versions of the file together. Unchanged lines are displayed as one, while added and deleted lines are highlighted with the appropriate line number for the version.

Making Comments and Marking Defects

On the left of the main Diff Viewer page, there is a pane for chat threads, where you can view and make comments and mark defects that should be fixed. When reviewing text files, you can create [global](#)^[380], [annotation](#)^[380], [overall](#) for file revision^[381] and [line](#)^[381] comments and defects.

To add line comments, click the desired line of text in the content view, type your comment in the text box and click **Add**. To add defects, click the desired line of text in the content view, type the defect description, click **Add as defect** and fill-in the required fields.



To learn more about communicating during the reviews, see [Types of Review Comments and Defects](#)^[378] and [Review Chats, Comments and Defects](#)^[385] topics.

Menubar

Right at the top, above the main file view, a menubar is displayed with a few possible actions. Buttons with blue triangles to the right will display drop-down menus when clicked on. For a list of all of the features of the menubar, please review the [Diff Viewer Overview](#)^[339] section.

The File Content View

To the right of the chat session, there is the main file view. This is where you can view file content and differences. The format of the main file on your local Collaborator screen may be different depending on how you have configured the [Display options](#)^[346] for the Diff Viewer.

```

1 package com.smartbear.ccollab.webclient.
  reviewsummary.materials.files;
2
3 import java.util.ArrayList;
4 import java.util.Collections;
5 import java.util.Comparator;
6 import java.util.List;
7 import java.util.Map;
8
9 import com.google.common.collect.Lists;
10 import com.google.common.collect.Maps;
11 import com.google.inject.Inject;
12 import com.google.inject.assistedinject.Assisted;
13 import com.smartbear.ccollab.datamodel.client.ChangeType;
14 import com.smartbear.ccollab.datamodel.client.
  IConversationSummary;
15 import com.smartbear.ccollab.datamodel.client.
  IReviewSummaryFile;
16 import com.smartbear.ccollab.datamodel.client.LocatorType;
17 import com.smartbear.ccollab.datamodel.client.OverallLocator;
18
1 package com.smartbear.ccollab.webclient.reviewsummary.materials.files;
2
3 import java.util.ArrayList;
4 import java.util.Collections;
5 import java.util.Comparator;
6 import java.util.List;
7 import java.util.Map;
8
9 import com.google.common.collect.Lists;
10 import com.google.common.collect.Maps;
11 import com.google.inject.Inject;
12 import com.google.inject.assistedinject.Assisted;
13 import com.smartbear.ccollab.datamodel.client.ChangeType;
14 import com.smartbear.ccollab.datamodel.client.IConversationSummary;
15 import com.smartbear.ccollab.datamodel.client.IReviewSummary;
16 import com.smartbear.ccollab.datamodel.client.IReviewSummaryFile;
17 import com.smartbear.ccollab.datamodel.client.LocatorType;
18 import com.smartbear.ccollab.datamodel.client.OverallLocator;

```

If differences are being shown, the interface automatically scrolls to the first difference (unless you got to this screen by clicking on a particular line number, in which case the screen will be centered on that line number). Below the file content is a small area which shows the currently selected line in an over-under view. This is most useful when the content view is in side-by-side mode, but the differences are not immediately clear in that view.

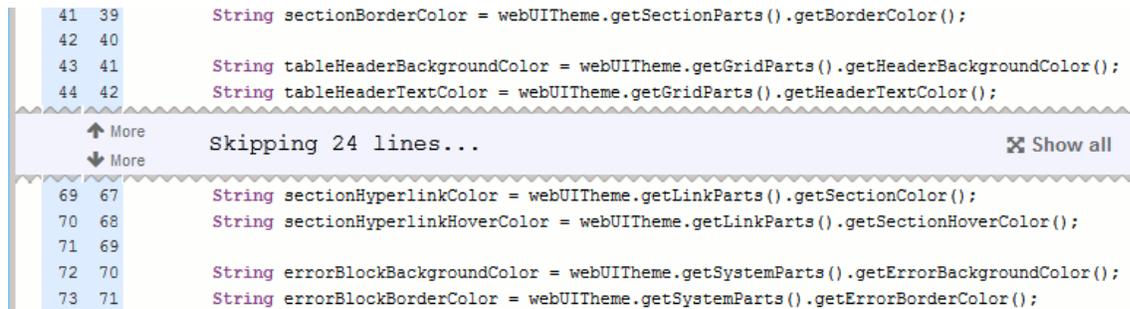
```

88         return
89         o1.getLocator().compareTo(o2.getLocator());
90     };
91     Collections.sort(sortedConvos,
92     locatorComparator);
93     view.addConversationRows(newRows);
94     }
95     for (IConversationSummary convo : sortedConvos) {
96         IConversationSummaryView convoView =
97         view.addConversation(convo.getLocator(), conversationsAdded);
98         ConversationSummaryPresenter presenter =
99         convoPresenterFactory.create(convo, convoView);
100         convoPresenters.put(convo, presenter);
101         presenter.bind();
102     }
103     conversationsAdded = true;
104
105     return o1.getLocator().compareTo(o2.getLocator());
106
107     return o1.getLocator().compareTo(o2.getLocator());
108 }

```

Skip Unchanged

If the "[Skip Unchanged](#)³⁴⁶" option is enabled, unchanged lines will be hidden in the Diff Viewer as shown below:



The screenshot shows a diff viewer interface. At the top, there are four lines of code with line numbers 41-44 on the left and corresponding line numbers 39-42 on the right. The code is: `String sectionBorderColor = webUITheme.getSectionParts().getBorderColor();`, `String tableHeaderBackgroundColor = webUITheme.getGridParts().getHeaderBackgroundColor();`, and `String tableHeaderTextColor = webUITheme.getGridParts().getHeaderTextColor();`. Below this is a light blue bar with the text "Skipping 24 lines...". On the left side of this bar are two "More" links with up and down arrows, and on the right is a "Show all" link with a magnifying glass icon. Below the bar, there are four more lines of code with line numbers 69-73 on the left and corresponding line numbers 67-71 on the right. The code is: `String sectionHyperlinkColor = webUITheme.getLinkParts().getSectionColor();`, `String sectionHyperlinkHoverColor = webUITheme.getLinkParts().getSectionHoverColor();`, `String errorBlockBackgroundColor = webUITheme.getSystemParts().getErrorBackgroundColor();`, and `String errorBlockBorderColor = webUITheme.getSystemParts().getErrorBorderColor();`.

If you would like to get more lines of context, just click either "More" link. The top link will show the next 25 lines of context, while the bottom link will show the last 25 lines of context.

Syntax Coloring

When the "[Syntax Coloring](#)³⁴⁶" option is enabled, Collaborator attempts to determine a computer language of the current file and apply an appropriate syntax highlighting to it.

Collaborator has built-in support of syntax highlighting for the following computer languages:

- Ada
- ASP.NET
- Assembler
- C
- C#
- C++
- Cobol
- CSS
- Delphi
- Gosu
- HTML
- Java

- JavaScript
- JavaServer Pages (JSP)
- Objective-C
- Perl
- PHP
- Python
- Ruby
- SGML
- Shell Script
- SQL Script
- TCL-based
- Verilog
- VHDL
- Visual Basic
- XML

Syntax highlighting is fully configurable. Your Collaborator administrators can modify existing [syntax highlighting schemas](#)^[277] or create new schemas to add highlighting for any other computer languages.

Moreover, if a DiffViewer displays a file whose type does not match any of the existing syntax highlighting schemas, Collaborator will display a prompt to [create a new custom syntax highlighting schema](#)^[277] for this file type.

4.3.7.3 Reviewing Word Processing Documents

Important: Document reviews is only supported on 64-bit Collaborator servers. On 32-bit platforms, Collaborator may fail to process the documents due to insufficient memory.

Collaborator supports reviewing word processing documents of the following formats:

- Microsoft Word (.DOC, .DOCX, .DOCM, .DOT, .DOTM, .DOTX),
- Rich Text (.RTF)
- OpenDocument (.ODT and .OTT)

Having uploaded any of these documents to the review you can:

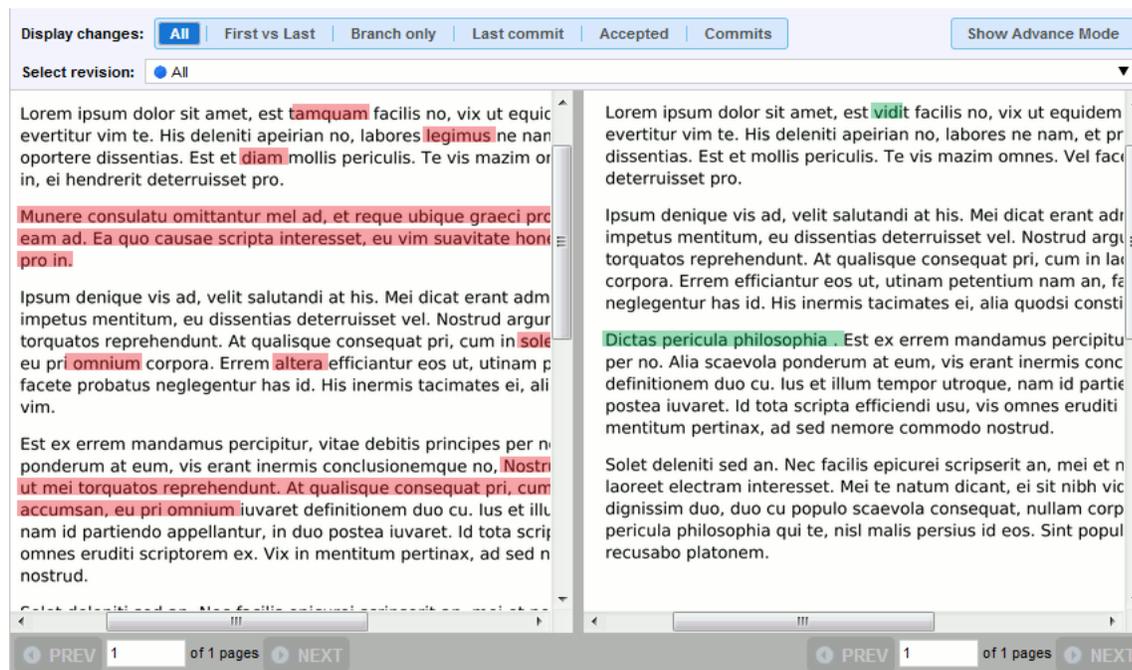
- View highlighted differences between discrete revisions.
- Insert comments and defects, marked by pushpins, into the documents to simplify conversation.
- Download discrete revisions of the original documents.

Tip: You can install [Collaborator plugin for Microsoft Word](#) to upload your documents directly from Microsoft Word.

Note: if you have the Track Changes setting enabled in your Word document, you have to accept the changes before uploading the document to Collaborator. Otherwise, Collaborator will treat the deleted text as if it were never deleted.

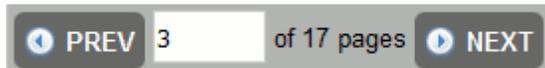
Viewing Highlighted Differences

Collaborator automatically finds and highlights differences between the document revisions that you uploaded and selected for review. Both revisions uses standard highlighting: red for deletions, yellow for changes and green for additions.



Documents can have content that displays, for example, on page 2 of the original version and on page 4 of the reviewed version. The Diff Viewer recognizes these changes, promotes comments to correct places in the newer version and navigates the Before and After panes independently to make this content visible during the review.

To navigate each page independently, use pagination controls at the bottom of the Diff Viewer:



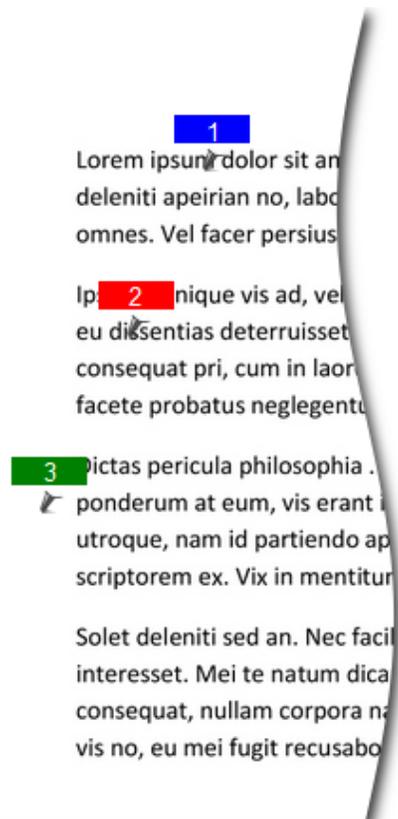
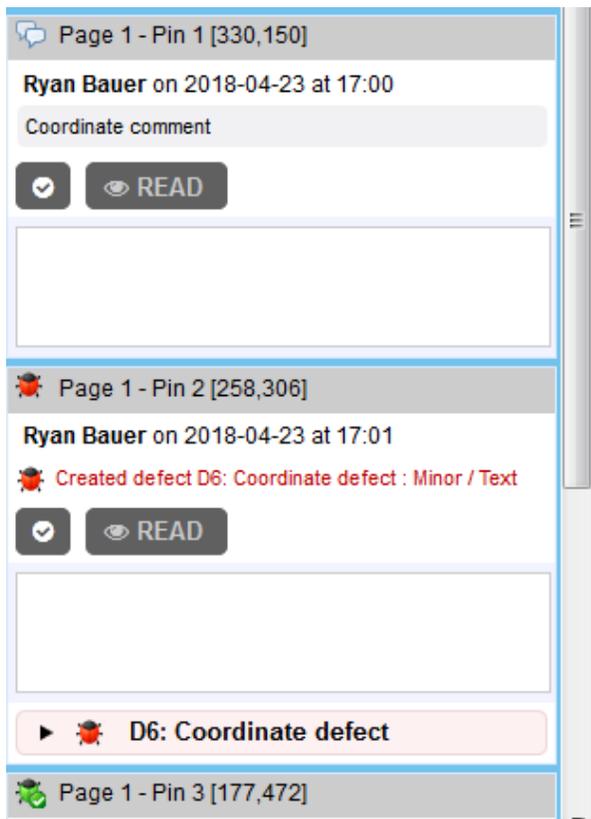
You can also use the mouse wheel to scroll through the pages (unless disabled by the [respective option](#)^[299]).

Making Comments and Marking Defects

On the left of the main Diff Viewer page, there is a pane for chat threads, where you can view and make comments and mark defects that should be fixed. When reviewing word processing documents, you can create [global](#)^[380], [annotation](#)^[380], [overall for file revision](#)^[381], [coordinate \(pushpin\)](#)^[382] and [label](#)^[383] comments and defects.

To comment on specific text in a document, simply click the document at a point where you would

like your comment to appear and begin typing. Collaborator will insert a pushpin () to indicate the comment. The number in the pushpin head corresponds to the comment's order within the current page of the document.



You can hide pushpins by clicking the pushpin toggle button on the toolbar. Use this feature if a pushpin overlaps an important part of the document.

Alternatively, you may specify an arbitrary label, such as "Section 5.1", to describe the content you are referring to. Using labeled locations decreases the confusion that can occur when large changes occur in a text document resulting in the pushpins not being adjacent to the corresponding text. Label text may not be updated.

Except the fact that documents are highlighted with pushpins and text files are highlighted by line, the way you use [review chats](#)^[386] when reviewing Word documents is very similar to the way you use them when reviewing text files.

To learn more about communicating during the reviews, see [Types of Review Comments and Defects](#)^[378] and [Review Chats, Comments and Defects](#)^[385] topics.

Moving Comment Pushpins

You can move an existing pushpin to a new position in a document. The feature works in Mozilla Firefox and Google Chrome, and should be [enabled by administrator](#)^[174].

To move a comment:

1. Select the desired comment.
2. Press and hold the Move Comment handle ().
3. Drag and drop the handle over the new position in the document.

Downloading Original Files

Collaborator stores documents with the review. It converts them to PDF to render them in the [Diff Viewer](#)^[339]. You can download the original files from the Review Materials section of Review Summary Page, or in Advanced revision selection mode of Diff Viewer by clicking the Download File button next to revision selector:



Document Review Notes

- If you have the Track Changes setting enabled in your Word document, you have to accept the changes before uploading the document to Collaborator. Otherwise, Collaborator will treat the deleted text as if it were never deleted.

- After you have uploaded a Word document, Collaborator starts converting it to a specific format that it uses to find differences. This takes some time (several minutes for large documents). During the conversion, you can open the document in the Diff Viewer. However, you are not allowed to make comments, browse pages and see differences until the conversion is over. Once it finishes, Collaborator enables the page navigation controls and highlights the diffs.
- Since Collaborator converts word processing documents to the specific document format, it is impossible to use it to find diffs in some kinds of complex content, including these:
 - macros,
 - automatically generated formulas,
 - codes used for value calculation,
 - embedded objects,
 - built-in Word comments,
 - and so on.
- Due to conversion procedure, the formatting and appearance of some fragments may alter from the original document. Typically these are auxiliary parts of a document, like headers, footers, footnotes and similar.
- To keep the computer performance reasonable Collaborator limits the number of documents it will convert concurrently to four by default. If you upload a document while the conversion pool is full, the document will wait until there is room for it. This can take several minutes.
- If you experience server performance degradation, try configuring [Java VM memory settings](#)^[110]. We recommend running the Collaborator server on a computer that has at least 4 CPUs (or cores) and has more than 4GB of memory allocated for the Java virtual machine. The memory requirement may increase depending on the typical document size your users upload. If you continue experiencing problems or need further assistance, please contact our [Support Team](#)^[32].
- If the DiffViewer has troubles displaying small characters, diagrams or documents look blurry, you will need to increase the resolution scale via the [com.smartbear.diff.image.resolution.scale](#)^[109] Java VM option, restart Collaborator server and clear browser cache.

4.3.7.4 Reviewing Spreadsheets

Important: Document reviews is only supported on 64-bit Collaborator servers. On 32-bit platforms, Collaborator may fail to process the documents due to insufficient memory.

Collaborator adds native support for Microsoft Excel (.XLS, .XLSX, .XLSB, .XLSM, .XLTM, .XLTX) and OpenDocument (.ODS) spreadsheets. This is useful particularly for users who want to compare files such as QA test plans. Every effort is made to keep the Excel format, so a review shows the entire spreadsheet, which can consist of multiple worksheets.

Note: When a file is uploaded for review, hidden rows are shown. Some formatting options are ignored. You may need to save your file with "word wrap" enabled to more easily see the content during reviews.

Worksheet is often abbreviated as "sheet". As in Excel, the UI displays a list of tabs at the bottom of the workbook for switching between worksheets. Only one worksheet is displayed at a time.

! Do not rename spreadsheets between uploading revisions. If a spreadsheet's name was changed, Collaborator cannot map them. As a result, it will display cell location's values as deleted, and will show the "Sheet not present in this version" warning.

When you click in a cell, the value is displayed in the cell detail pane (equivalent to the formula bar in Excel). The values for the selected cell appear in the cell detail pane with the value for the "after" version on top:

The screenshot displays the Collaborator web client interface for reviewing a spreadsheet. The main area shows two side-by-side views of the spreadsheet, labeled 'before' and 'after'. The 'after' view shows several changes in cell values, including 'Number of people per review' (5 to 15), 'Total number of developers' (35), 'Defects found per review' (8), 'Hours spent per review (per person)' (1.5), 'Labor cost per hour' (50), and '# Reviews Per Month' (100). A prominent orange banner reads 'Step 1: Enter data from your existing'. The interface includes a top navigation bar, a left sidebar with 'Overall' and 'READ' buttons, and a bottom formula bar showing the value '5' and a 'Wrap: Prompt' dropdown.

Display

The Display button has specific options for spreadsheet review. When you select Evaluate Formulas, only the evaluated result of the formula is shown, not the formula itself. You can toggle this through the Display button or the Evaluate Formulas button at the bottom of the Diff Viewer.

You can also toggle Display Empty Cells, which provides shading for empty cells.

Viewing Differences

Since it is difficult to compare spreadsheet revisions to meet all use cases, some changes may not be highlighted in diffs in the way that people would expect. We will continue to work on the Excel diff feature to meet the broadest set of needs.

As part of the review, you can do diffs of the files that show the contents of a cell (either formula or result). You can navigate around the spreadsheet by selecting the cell location.

The UI displays a diff of two versions of a spreadsheet side-by-side. There is a panel at the bottom that shows the contents of the selected cell in both versions of the spreadsheet on top of one another for easy visual comparison.

The use of color allows you to quickly identify changes in diffs so that you can address just what has been modified, added or deleted between spreadsheet revisions.

- Added cells have a green background.
- Deleted cells have a red background.
- Modified cells have a yellow background.
- All other cells (empty or not) display with a white background.
- Empty cells are NOT highlighted, even if they are different (added or deleted).

Note: The specific document format used by Collaborator makes it impossible to display diffs in complex objects, such as diagrams, charts and embedded images. If you are using those and want to see their differences, consider [converting the spreadsheet to PDF format](#) ³⁷².

Reviewing Formulas

Formulas are not displayed by default. Depending on the Evaluate Formulas option, the cell content is the formula (for example, " $=1+1$ ") or the value of the formula (for example, "2"). You can also toggle formulas by the button in the cell detail pane. When you click in a cell, the value is displayed at the bottom in the formula space.

98					
99		Monthly Cost to find and fix bugs that progressed beyond Dev		=D66*D36	=F66*F36
100					
101					
102					
103					
104		MONTHLY COST SAVINGS			=D68-F68
105		ANNUAL COST SAVINGS			=F70*12
106					

ROI Calculation Worksheet Summary

fx =F70*12

If you click the Evaluate Formulas button, the value displays in the cell detail pane:

98					
99		Monthly Cost to find and fix bugs that progressed beyond Dev		=D66*D36	=F66*F36
100					
101					
102					
103					
104		MONTHLY COST SAVINGS			=D68-F68
105		ANNUAL COST SAVINGS			=F70*12
106					

ROI Calculation Worksheet Summary

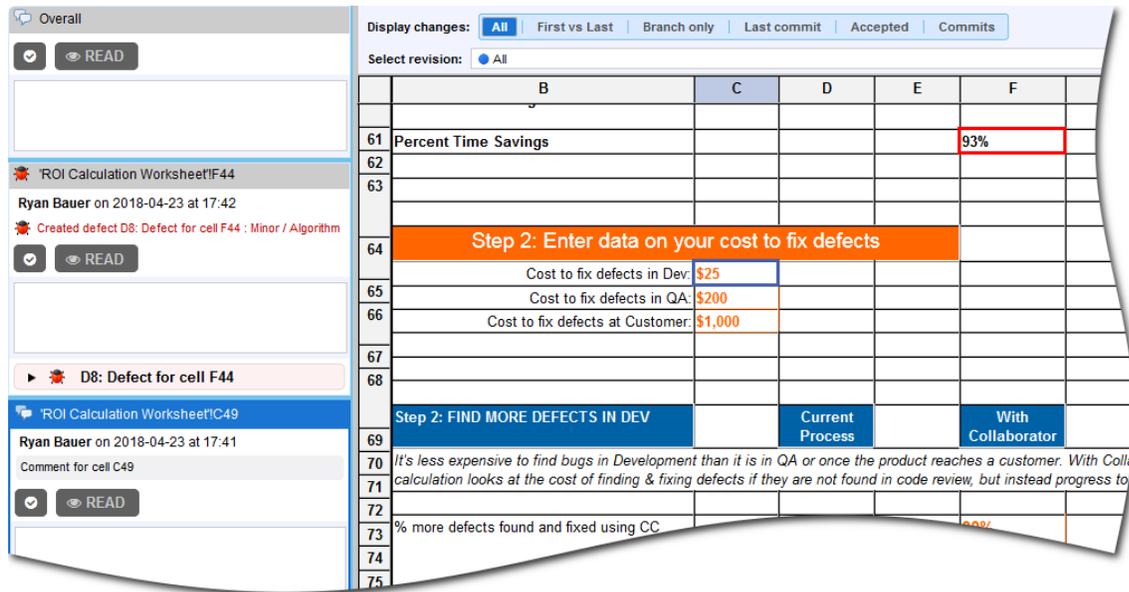
fx \$1,036,800

Making Comments and Marking Defects

On the left of the main Diff Viewer page, there is a pane for chat threads, where you can view and make comments and mark defects that should be fixed. When reviewing spreadsheets, you can create [global](#)^[380], [annotation](#)^[380], [overall for file revision](#)^[381] and [cell](#)^[384] comments and defects.

To comment on specific cell within a spreadsheet, click the desired cell in the content view, type your comment in the text box and click **Add**. To add defects, click the desired cell in the content view, type the defect description, click **Add as defect** and fill-in the required fields.

Conversations on cells are displayed in alphabetical order by sheet name, not in the sheet order found in the version content. In the example above, conversations for "ROI Calculation Worksheet" would come before "Summary" work sheet. The name of the chat includes the name of the sheet followed by the location of the cell being discussed. For example, Summary!C10.



To learn more about communicating during the reviews, see [Types of Review Comments and Defects](#) ^[378] and [Review Chats, Comments and Defects](#) ^[385] topics.

4.3.7.5 Reviewing Presentations

Important: Document reviews is only supported on 64-bit Collaborator servers. On 32-bit platforms, Collaborator may fail to process the documents due to insufficient memory.

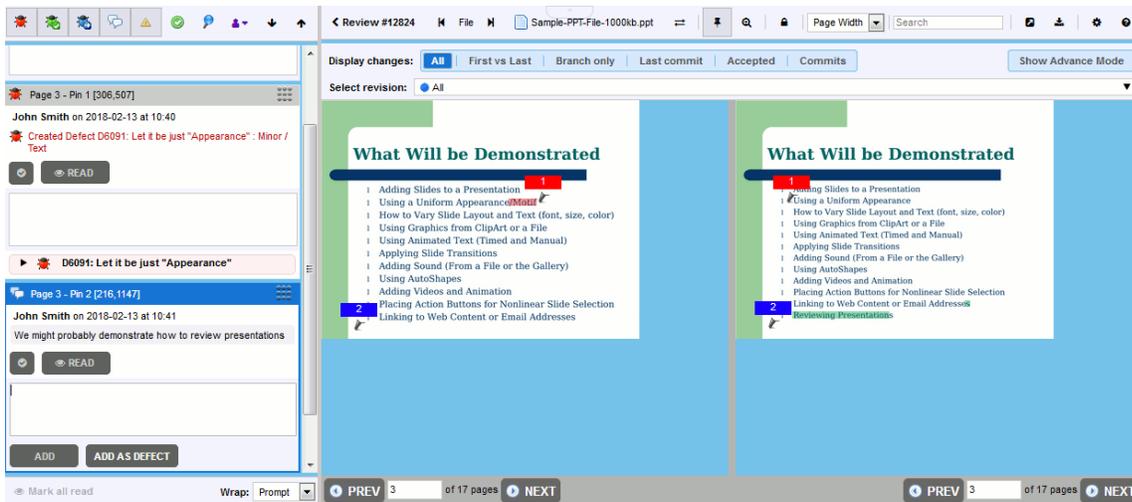
Collaborator adds native support for Microsoft PowerPoint (.PPT, .PPTX, .POT, .POTM, .POTX, .PPS, .PPSM, .PPSX, .PPTM) and OpenDocument (.ODP) presentations.

Uploading Presentations

To review presentations, just [attach](#) ^[315] them to the review as you would any other file and when you open the Diff Viewer, the content area will display the presentation contents for review.

Viewing Differences

Presentations can only be viewed in a **single** or **side-by-side** layout.

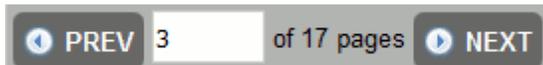


Reviewing Presentations

Scrollbars are available for each revision of the document. You are also able to move the separator to show more or less of either revision. To do this, hover the mouse over the separator until the arrows appear, and click and drag until it reaches the desired location.

Changing Slides

To change presentation slides or pages, use the arrows at the bottom left of the comparison screen.



The arrows will allow you to go to the **Previous Page** or the **Next Page**. You can also manually enter a **page number** and hit enter to jump to any arbitrary page. The page numbers will refer to the latest upload of the document shown.

You can also use the mouse wheel to scroll through the pages (unless disabled by the [respective option](#)^[299]).

Zooming In And Out

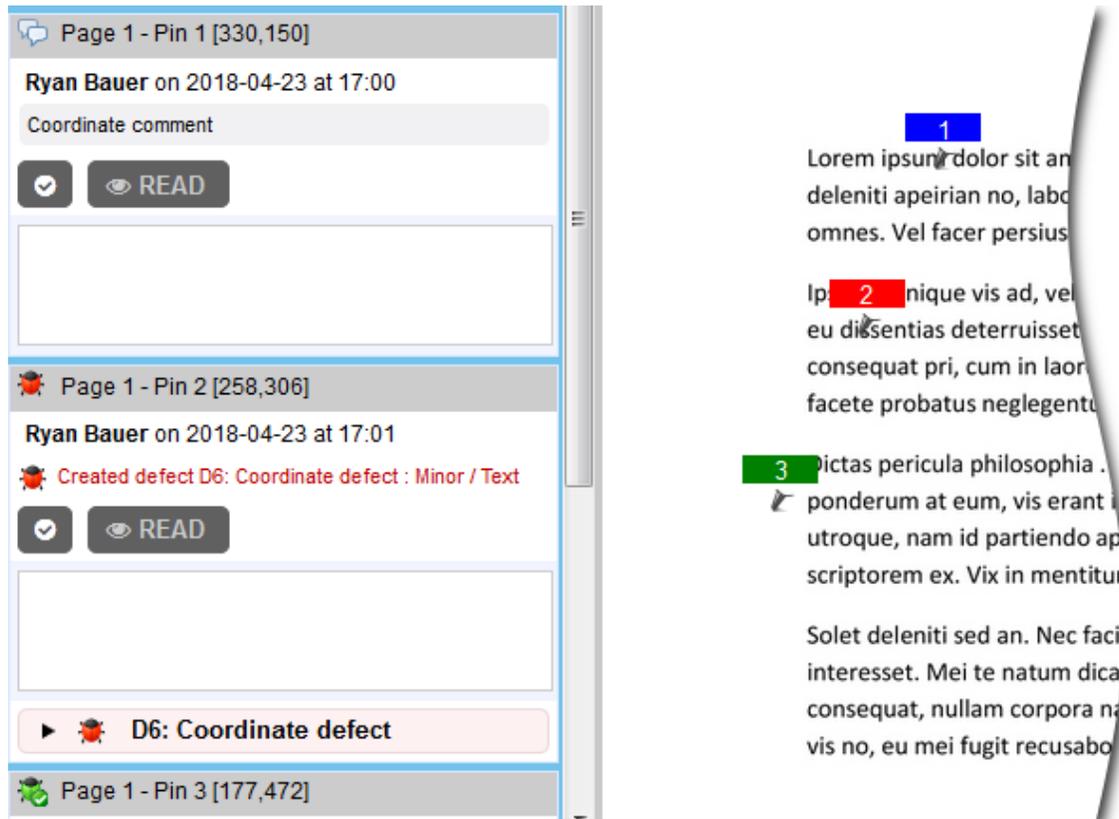
Both the side-by-side and single view support [zooming](#)^[343] the images in the display. Zooming out is useful if the page is too large to display in the browser window without scrolling. Zoom is also useful for more precise placement of the comment markers. However, whether zoomed in or out, the comment markers still refer to pixel locations in the image at 100% zoom, so subpixel comments are not supported. If a zoom operation would cause the currently selected location to scroll offscreen, the image will be scrolled to recenter the selected location.

Rescaling of documents is performed by re-rendering the document on the Collaborator server and could be slow depending on the size of the document and the selected image scale.

Making Comments and Marking Defects

On the left of the main Diff Viewer page, there is a pane for chat threads, where you can view and make comments and mark defects that should be fixed. When reviewing presentations, you can create [global](#)^[380], [annotation](#)^[380], [overall for file revision](#)^[381], [coordinate \(pushpin\)](#)^[382] and [label](#)^[383] comments and defects.

To comment on specific text in a document, simply click the document at a point where you would like your comment to appear and begin typing. Collaborator will insert a pushpin () to indicate the comment. The number in the pushpin head corresponds to the comment's order within the current page of the document.



You can hide pushpins by clicking the pushpin toggle button on the toolbar. Use this feature if a pushpin overlaps an important part of the document.

Alternatively, you may specify an arbitrary label, such as "Section 5.1", to describe the content you are referring to. Using labeled locations decreases the confusion that can occur when large changes occur in a text document resulting in the pushpins not being adjacent to the corresponding text. Label text may not be updated.

To learn more about communicating during the reviews, see [Types of Review Comments and Defects](#)^[378] and [Review Chats, Comments and Defects](#)^[385] topics.

Moving Comment Pushpins

You can move an existing pushpin to a new position in a document. The feature works in Mozilla Firefox and Google Chrome, and should be [enabled by administrator](#)^[174].

To move a comment:

1. Select the desired comment.
2. Press and hold the Move Comment handle ().
3. Drag and drop the handle over the new position in the document.

Document Review Notes

- If the DiffViewer has troubles displaying small characters, diagrams or documents look blurry, you will need to increase the resolution scale via the [com.smartbear.diff.image.resolution.scale](#)^[1093] Java VM option, restart Collaborator server and clear browser cache.

4.3.7.6 Reviewing Vector Graphics

Important: Document reviews is only supported on 64-bit Collaborator servers. On 32-bit platforms, Collaborator may fail to process the documents due to insufficient memory.

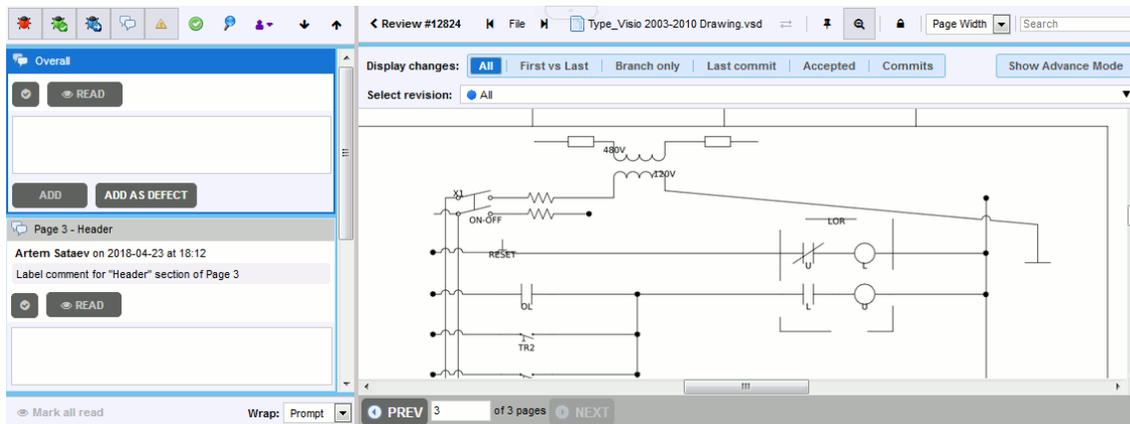
Collaborator adds native support for Microsoft Visio vector graphics (.VDW, .VDX, .VSD, .VSDM, .VSDX, .VSS, .VSSM, .VSSX, .VST, .VSTM, .VSTX, .VSX and .VTX).

Uploading Vector Graphics

To review Visio vector graphics, just [attach](#)^[315] them to the review as you would any other file and when you open the Diff Viewer, the content area will display the presentation contents for review.

Viewing Differences

Vector graphics can only be viewed in a **single** or **side-by-side** layout. Diff Viewer cannot highlight differences in graphical objects, however it is able to highlight changes in text contents: changes are yellow, additions are green and deletions are red.

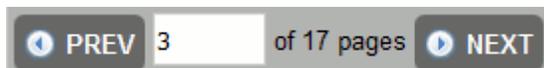


Reviewing Presentations

Scrollbars are available for each revision of the document. You are also able to move the separator to show more or less of either revision. To do this, hover the mouse over the separator until the arrows appear, and click and drag until it reaches the desired location.

Changing Pages

To change pages (when a drawing consists of multiple pages), use the arrows at the bottom left of the comparison screen.



The arrows will allow you to go to the **Previous Page** or the **Next Page**. You can also manually enter a **page number** and hit enter to jump to any arbitrary page. The page numbers will refer to the latest upload of the document shown.

You can also use the mouse wheel to scroll through the pages (unless disabled by the [respective option](#)²⁹⁹).

Zooming In And Out

Both the side-by-side and single view support [zooming](#)³⁴³ the images in the display. Zooming out is useful if the page is too large to display in the browser window without scrolling. Zoom is also useful for more precise placement of the comment markers. However, whether zoomed in or out, the comment markers still refer to pixel locations in the image at 100% zoom, so subpixel comments are not supported. If a zoom operation would cause the currently selected location to scroll offscreen, the image will be scrolled to recenter the selected location.

Rescaling of documents is performed by re-rendering the document on the Collaborator server and could be slow depending on the size of the document and the selected image scale.

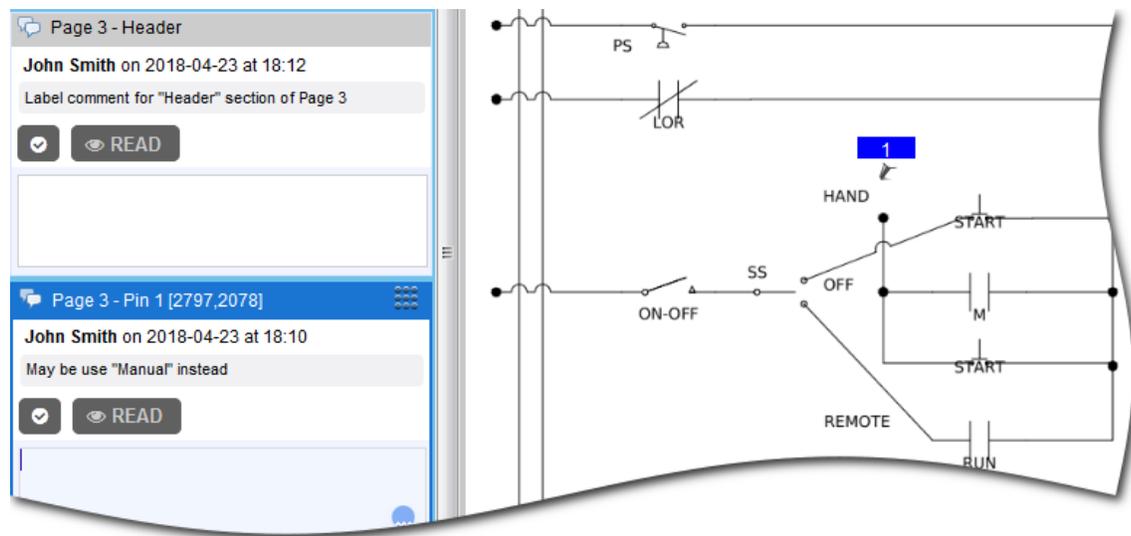
Making Comments and Marking Defects

On the left of the main Diff Viewer page, there is a pane for chat threads, where you can view and make comments and mark defects that should be fixed. When reviewing vector graphic files, you can create [global](#)^[380], [annotation](#)^[380], [overall for file revision](#)^[381], [coordinate \(pushpin\)](#)^[382] and [label](#)^[383] comments and defects.

To comment on specific location, simply click the image at a point where you would like your

1

comment to appear and begin typing. Collaborator will insert a pushpin () to indicate the comment. The number in the pushpin head corresponds to the comment's order within the current image.



You can hide pushpins by clicking the pushpin toggle button on the toolbar. Use this feature if a pushpin overlaps an important part of the document.

Alternatively, you may specify an arbitrary label, such as "Header section", to describe the content you are referring to. Using labeled locations decreases the confusion that can occur when large changes occur in a text document resulting in the pushpins not being adjacent to the corresponding text. Label text may not be updated.

To learn more about communicating during the reviews, see [Types of Review Comments and Defects](#)^[378] and [Review Chats, Comments and Defects](#)^[385] topics.

Moving Comment Pushpins

You can move an existing pushpin to a new position in a document. The feature works in Mozilla Firefox and Google Chrome, and should be [enabled by administrator](#)^[174].

To move a comment:

1. Select the desired comment.
2. Press and hold the Move Comment handle ().
3. Drag and drop the handle over the new position in the document.

Document Review Notes

- In multi-page drawings, the first page has smaller scale than other pages. The third-party library used for processing Visio graphics, mimics the behaviour of the original Microsoft Visio application which also saves the first page smaller than other pages.
- If the DiffViewer has troubles displaying small characters, diagrams or documents look blurry, you will need to increase the resolution scale via the [com.smartbear.diff.image.resolution.scale](#)^[1083] Java VM option, restart Collaborator server and clear browser cache.

4.3.7.7 Reviewing Images

Images can be reviewed within the tool and not as external binary files. Image files must be renderable by the browser and be [configured by the administrator](#)^[187] to be treated as images. By default, JPEG (.jpg and .jpeg), GIF (.gif), and PNG (.png) files are treated as images.

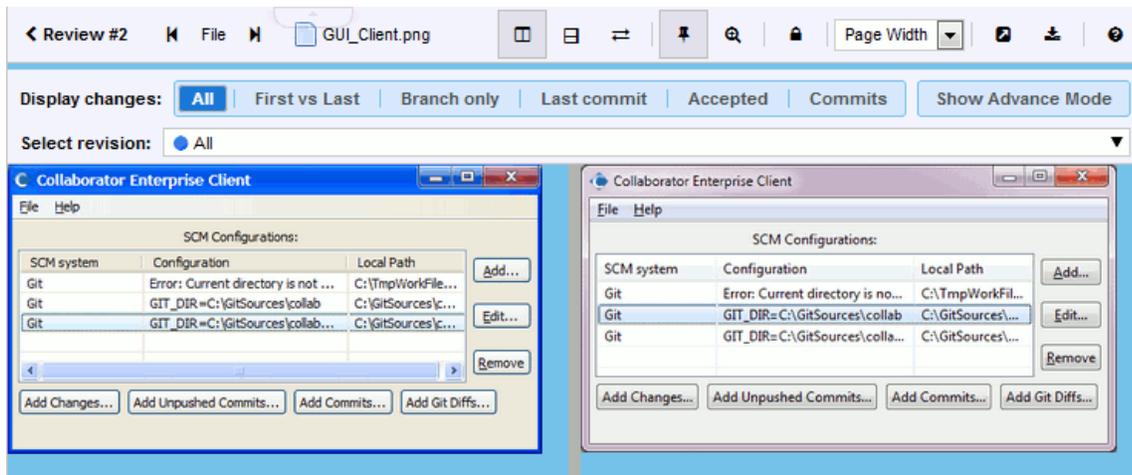
Uploading Images

To review images, just [attach](#)^[315] them to the review as you would any other file, and when you open the Diff Viewer, the content area will display the images for review.

Viewing Differences

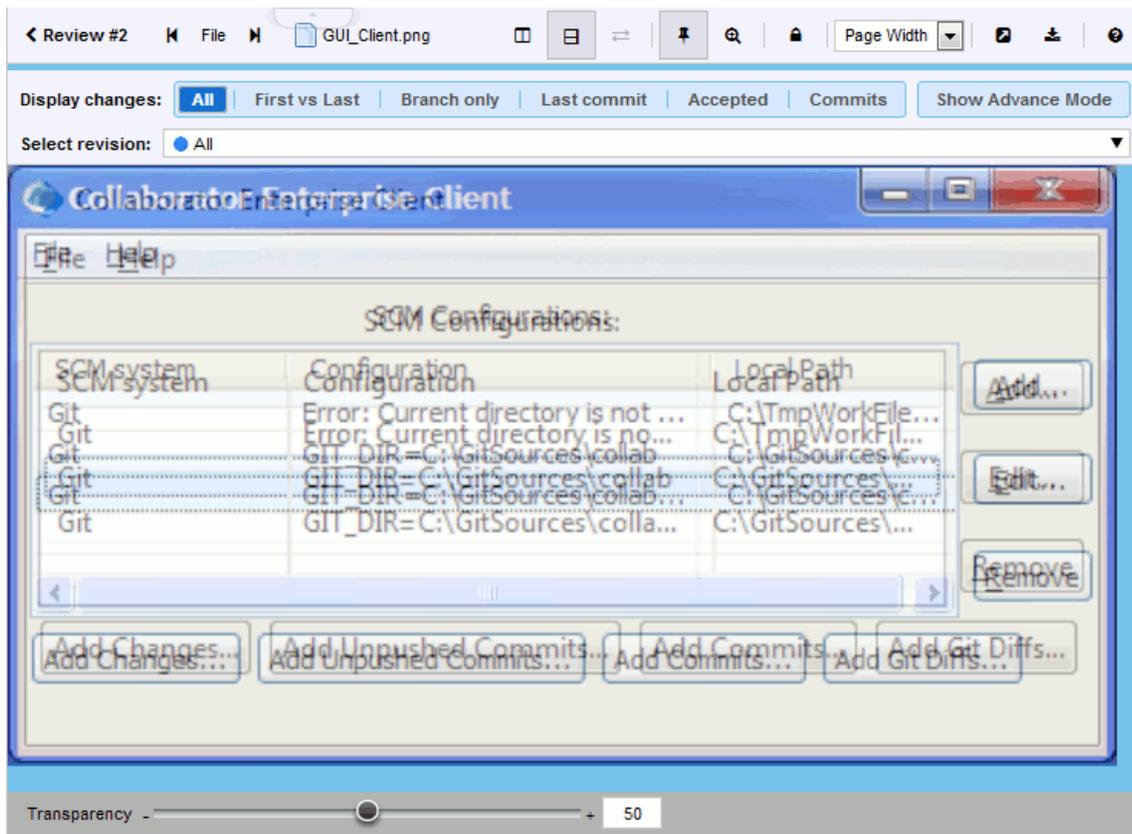
Images can be reviewed in two different manners: **side-by-side** or **overlaid**. Toggling between the two layouts is as simple as clicking the  **Orientation** button on the toolbar.

The **side-by-side view** displays the before and after images separately, one next to another. This layout is useful to see both images at the same time.



Side-by-Side Image Review

The **overlaid view** displays the after image over the before image (as image layers on photo editors). The **Transparency** selector adjusts the opacity of the top image and thus allows you to blend the two images together. This layout is useful to see the subtle differences between two images, including alignment differences and color variation.



Overlaid Image Review

Zooming In And Out

Both the side-by-side and overlaid view support [zooming the images](#)^[343] in the display. Whether zoomed in or out, the comment markers still refer to pixel locations in the image at 100% zoom, so subpixel comments are not supported. If a zoom operation would cause the currently selected location to scroll offscreen, the image will be scrolled to recenter the selected location.

The image rescaling for the zoom function is provided by the browser and may introduce artifacts depending on the type of image and the scaling algorithm chosen by the browser.

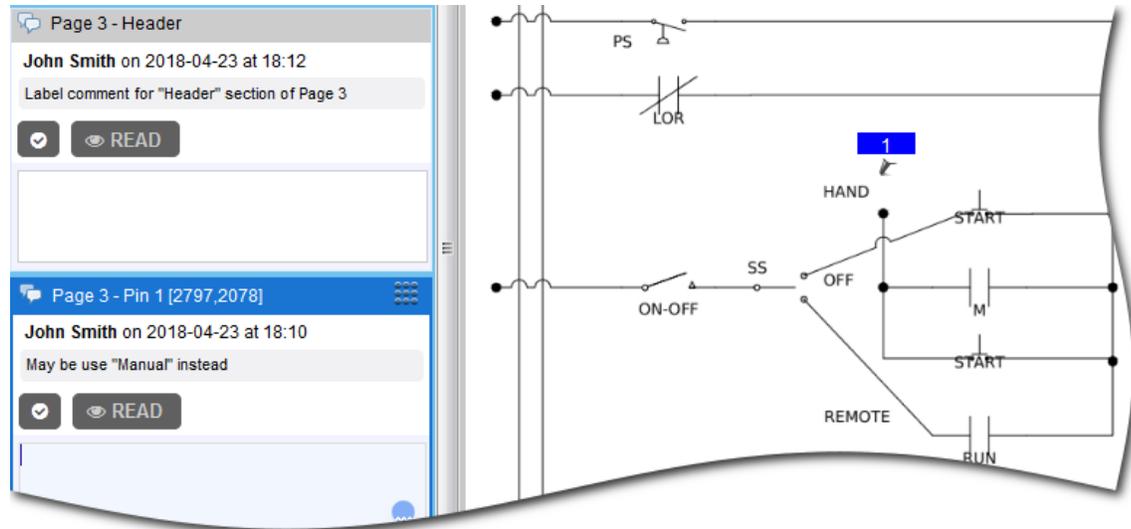
Making Comments and Marking Defects

On the left of the main Diff Viewer page, there is a pane for chat threads, where you can view and make comments and mark defects that should be fixed. When reviewing image files, you can create [global](#)^[380], [annotation](#)^[380], [overall for file revision](#)^[381], [coordinate \(pushpin\)](#)^[382] and [label](#)^[383] comments and defects.

To comment on specific location, simply click the image at a point where you would like your

1

comment to appear and begin typing. Collaborator will insert a pushpin () to indicate the comment. The number in the pushpin head corresponds to the comment's order within the current image.



The pins may be turned off by clicking the pushpin toggle in the image review toolbar at the bottom of the content pane. This is useful when the pushpins cover important parts of the image.

Alternatively, you may specify an arbitrary label, such as "Header section", to describe the content you are referring to. Using labeled locations decreases the confusion that can occur when large changes occur in an image resulting in the pushpins not being adjacent to the corresponding context. Label text may not be updated.

To learn more about communicating during the reviews, see [Types of Review Comments and Defects](#)^[378] and [Review Chats, Comments and Defects](#)^[385] topics.

Moving Comment Pushpins

You can move an existing pushpin to a new position in a document. The feature works in Mozilla Firefox and Google Chrome, and should be [enabled by administrator](#)^[174].

To move a comment:

1. Select the desired comment.
2. Press and hold the Move Comment handle ().
3. Drag and drop the handle over the new position.

4.3.7.8 Reviewing PDFs and Documents of Other Types

Important: Document reviews is only supported on 64-bit Collaborator servers. On 32-bit platforms, Collaborator may fail to process the documents due to insufficient memory.

Collaborator includes native support for PDF files. Additionally, you may convert any other document type into PDF format and upload it to Collaborator.

Uploading PDFs

To review PDF documents, just [attach](#)^[315] them to the review as you would any other file and when you open the Diff Viewer, the content area will display the documents for review.

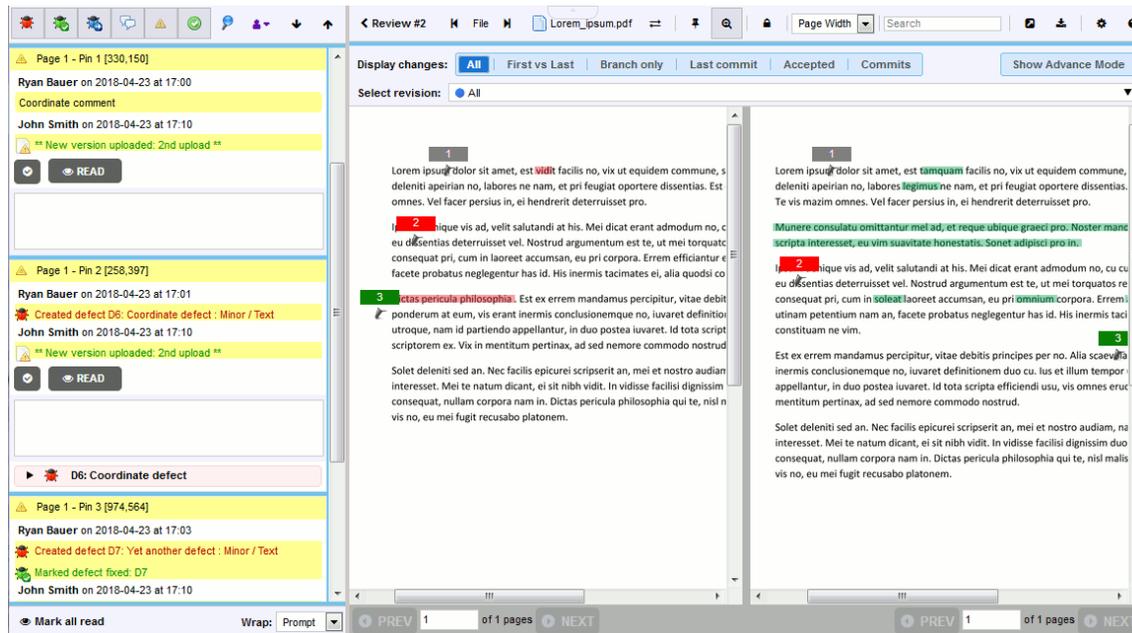
Uploading Arbitrary Document Types

To upload any arbitrary document, you need to convert the desired document to PDF format using a conversion tool and then upload it to the review. Popular converters include (but are not limited to):

- [OpenOffice](#)
- [PrimoPDF](#)
- [pdftk](#)
- [Microsoft Save as PDF or XPS Add-in](#)

Viewing Differences

Documents can only be viewed in a **single** or **side-by-side** layout. There is no over-under view available currently for PDF documents.

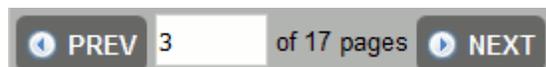


Side-by-Side PDF Review

Scrollbars are available for each revision of the document. You are also able to move the separator to show more or less of either revision. To do this, hover the mouse over the separator until the arrows appear, and click and drag until it reaches the desired location.

Changing Pages

To change pages, use the arrows at the bottom left of the comparison screen.



The arrows will allow you to go to the **Previous Page** or the **Next Page**. You can also manually enter a **page number** and hit enter to jump to any arbitrary page. The page numbers will refer to the latest upload of the document shown.

You can also use the mouse wheel to scroll through the pages (unless disabled by the [respective option](#)²⁹⁹).

Zooming In And Out

Both the side-by-side and single view support [zooming](#)^[343] the images in the display. Zooming out is useful if the page is too large to display in the browser window without scrolling. Zoom is also useful for more precise placement of the comment markers. However, whether zoomed in or out, the comment markers still refer to pixel locations in the image at 100% zoom, so subpixel comments are not supported. If a zoom operation would cause the currently selected location to scroll offscreen, the image will be scrolled to recenter the selected location.

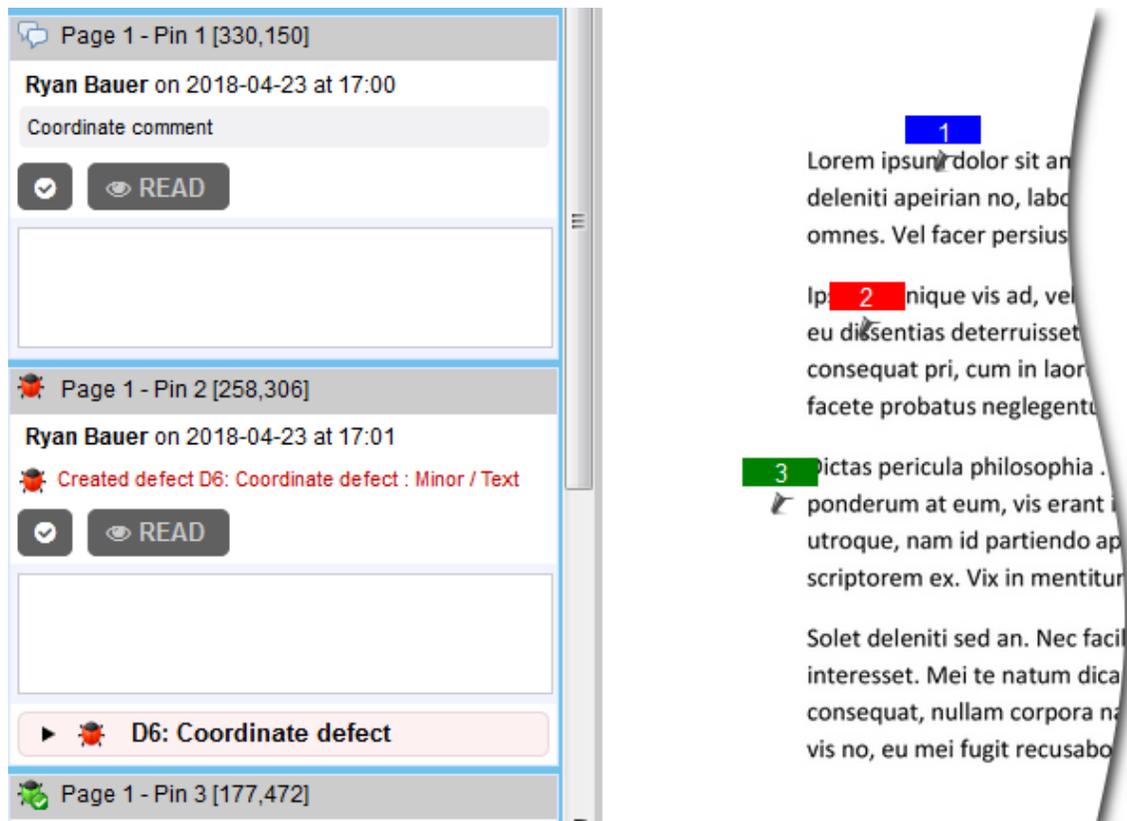
Rescaling of documents is performed by rerendering the document on the Collaborator server and could be slow depending on the size of the document and the selected image scale.

Making Comments and Marking Defects

On the left of the main Diff Viewer page, there is a pane for chat threads, where you can view and make comments and mark defects that should be fixed. When reviewing PDF files, you can create [global](#)^[380], [annotation](#)^[380], [overall for file revision](#)^[381], [coordinate \(pushpin\)](#)^[382] and [label](#)^[383] comments and defects.

To comment on specific text in a document, simply click the document at a point where you would

like your comment to appear and begin typing. Collaborator will insert a pushpin () to indicate the comment. The number in the pushpin head corresponds to the comment's order within the current page of the document.



You can hide pushpins by clicking the pushpin toggle button on the toolbar. Use this feature if a pushpin overlaps an important part of the document.

Alternatively, you may specify an arbitrary label, such as "Section 5.1", to describe the content you are referring to. Using labeled locations decreases the confusion that can occur when large changes occur in a text document resulting in the pushpins not being adjacent to the corresponding text. Label text may not be updated.

To learn more about communicating during the reviews, see [Types of Review Comments and Defects](#)^[378] and [Review Chats, Comments and Defects](#)^[385] topics.

Moving Comment Pushpins

You can move an existing pushpin to a new position in a document. The feature works in Mozilla Firefox and Google Chrome, and should be [enabled by administrator](#)^[174].

To move a comment:

1. Select the desired comment.
2. Press and hold the Move Comment handle ().

3. Drag and drop the handle over the new position in the document.

Document Review Notes

- If the DiffViewer has troubles displaying small characters, diagrams or documents look blurry, you will need to increase the resolution scale via the `com.smartbear.diff.image.resolution.scale`^[1093] Java VM option, restart Collaborator server and clear browser cache.

4.3.7.9 Reviewing URLs

URLs can also be reviewed in Collaborator.

However, it is important to note certain limitations. Currently, URLs are rendered in the browser as "live". This implies that clicking on a link on the URL page will direct you to a new page. This also means that you will not be able to anchor comments in the same manner as in image and document reviews.

With our current URL review functionality, newer versions of the URL will not be displayed with older versions, meaning you cannot display multiple versions of the same web page. If you would like to compare multiple URL versions, we recommend that you take static snap shots of the web page and use the [image review functionality](#)^[369] of Collaborator.

Uploading URLs

To add a web link:

1. Create a new review or open an existing review,
2. Scroll to the Review Materials section of the Review Summary Screen,
3. Click the **Upload** button on the toolbar,



4. Select **URL** from the drop-down list.
5. In the ensuing dialog, enter the desired URL and then click Attach.



Making Comments and Marking Defects

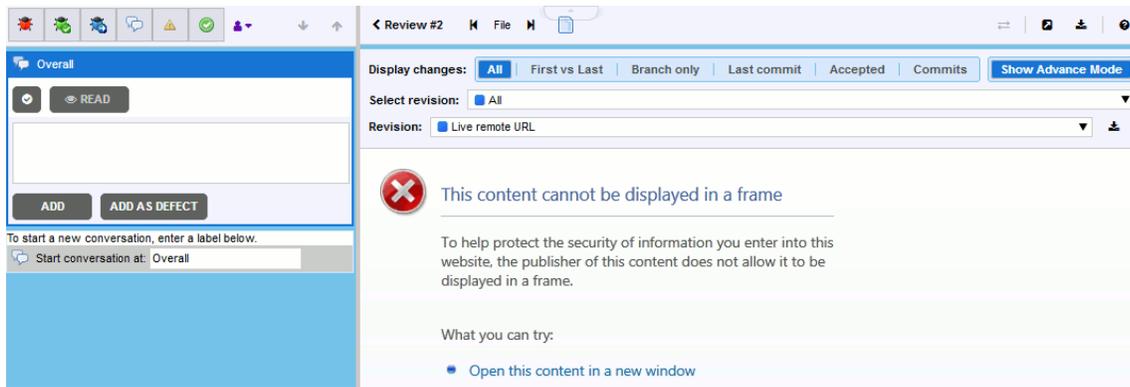
As mentioned above, you will not be able to anchor comments. Instead, you can specify an arbitrary label describing a part of the page or otherwise indicating to other participants what you are commenting on. In older versions of Collaborator, comments in URLs were anchored to a fake "line". Those comments will continue to be displayed, but will be sorted after the new labeled locations.



URL Review

Notes:

- The URL must be a valid web URL, which should include the protocol specification (either `http://` or `https://`).
- You will also see an error message if the specified URL is malformed.
- Collaborator does not check whether the specified resource is available. In fact, since it is a link, the contents and availability of the document can change at any time.
- Collaborator displays the referred resource in a frame. The server can send requested contents with anti-framing headers. You will not see the referred content in this case. Depending on the web browser you use, you will see an empty frame or an error message saying that *the content cannot be displayed in a frame*:



4.3.8 Types of Review Comments and Defects

There are two main types of messages in Collaborator: comments and defects.

Comments may hold any information concerning the review: a question, a clarification, a remark, an encouragement, whatever else. These are the major mean of communication during the review process.

Defects indicate a problem that needs to be fixed. Defects have some text that describes the problem and also can have any number of additional fields. These are all [completely configurable](#) ^[235] by the system administrator and can also vary depending on the [review workflow](#) ^[310] that was originally selected for the review. Because this is completely configurable, this manual cannot say exactly what the fields will be or what they mean; ask your administrator for details. It is common to see fields like severity, type, checklist item, and phase-injected.

Every defect is given a unique number, on the server. There will only ever be a single defect with the given ID, no matter how many defects, documents or reviews exist on the server.

All defects found during a review are listed in the [Defect Log](#) ^[324] section of the [Review Summary Screen](#) ^[316], (so you will not overlook any of them).

Note: The word "defect" has many connotations that are inappropriate for peer review. This does not mean the problem will be mirrored in an external issue-tracking system, and it does not necessarily mean it was a bug! Even "bad documentation" can be a defect.

A "defect" is just a way of identifying something that needs to be fixed.

Moreover, if the word "defect" has a negative connotation in your environment, your Collaborator administrator can [change it to another term](#)^[173].

Color Highlighting of Comments and Defects

To indicate the status of the comment or defect they are highlighted in different colors. The following color notations are used for message backgrounds in the Chat pane, for line indents of text files, for pushpins and for cell borders:

Color	Meaning
Blue	The currently selected conversation.
Red	An open defect.
Yellow	An unread comment.
Green	A fixed defect or an external defect.
Gray	No defects.

Global and Content Specific Comments and Defects

Comments and defects can be *global* or *context specific*. That is, they may relate to the entire review, or to certain review materials or even to particular line, coordinate, cell in one of the reviewed files.

Collaborator has the following sub-types of comments and defects:

- [Global \(Review Chat\)](#)^[380]
- [Annotation](#)^[380]
- [Overall for File Revision or URL](#)^[381]
- [Line](#)^[381]

- [Coordinate \(Pushpin\)](#) ³⁸²
- [Label](#) ³⁸³
- [Cell](#) ³⁸⁴

Global Comments and Defects(Review Chat)

These comments or defects relate to the entire review as a whole (not to some specific review materials). Can be used with all reviews.

Global comments and defects are displayed in the [Chat](#) ³²⁶ section of the [Review Summary Screen](#) ³¹⁶.



To add comments to the Chat section, simply type your comment in the text box and click "Add". To add defects, type the defect description, click "Add As Defect" and fill-in the required fields.

Annotation Comments

These type of comments provide short description (annotation, notes or some other short info) about a particular file revision or URL. Can be used with all review materials. Defects cannot be of annotation type.

Annotation comments are displayed in the Notes column of the [Review Materials](#) ³²⁷ section of the [Review Summary Screen](#) ³¹⁶.

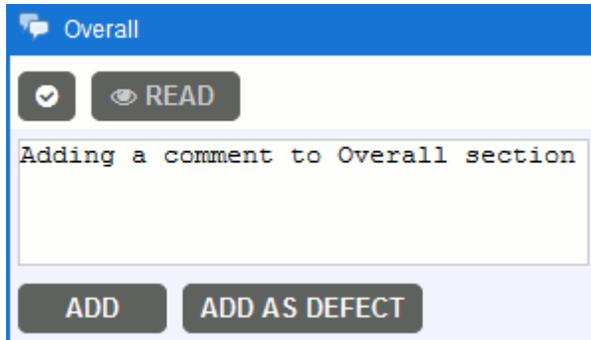
Files	Location	Status	Notes
foo.java		544 0 0	File annotation
RestRequest.json	Overall	22 0 0	+

To add annotation comments, click the plus button in the Notes column, enter annotation text and click "Save".

Overall Comments and Defects for File Revision or URL

These comments or defects relate to a particular file revision or URL (as a whole, but not to some specific part if it). Can be used with all kinds of review materials.

Overall comments and defects are displayed in the Overall section of Chat pane in the [Diff Viewer](#)



To add comments to the Overall section, simply type your comment in the text box and click "Add". To add defects, type the defect description, click "Add As Defect" and fill-in the required fields.

Line Comments and Defects

These comments or defects relate to a particular line within a file. Can be used with text-based files and their revisions. Multiple comments and defects can relate to the same line of text.

Line comments and defects are displayed in the Chat pane of the [Diff Viewer](#)

Line 62

Bob Campbell on 2018-04-16 at 14:49
I've been thinking about this and we should probably go a different route.

Bob Campbell on 2018-04-16 at 14:53
For example in `ITextDiffResources.java` at line 119, there's an alternative method.

John Smith on 2018-04-16 at 15:00
That seems like a good idea, let's change this.

ADD READ

ADD AS DEFECT

62 abstract
63
64
65
66
67
68 stat
Abstract
69
70 stat
71 stat

More
More

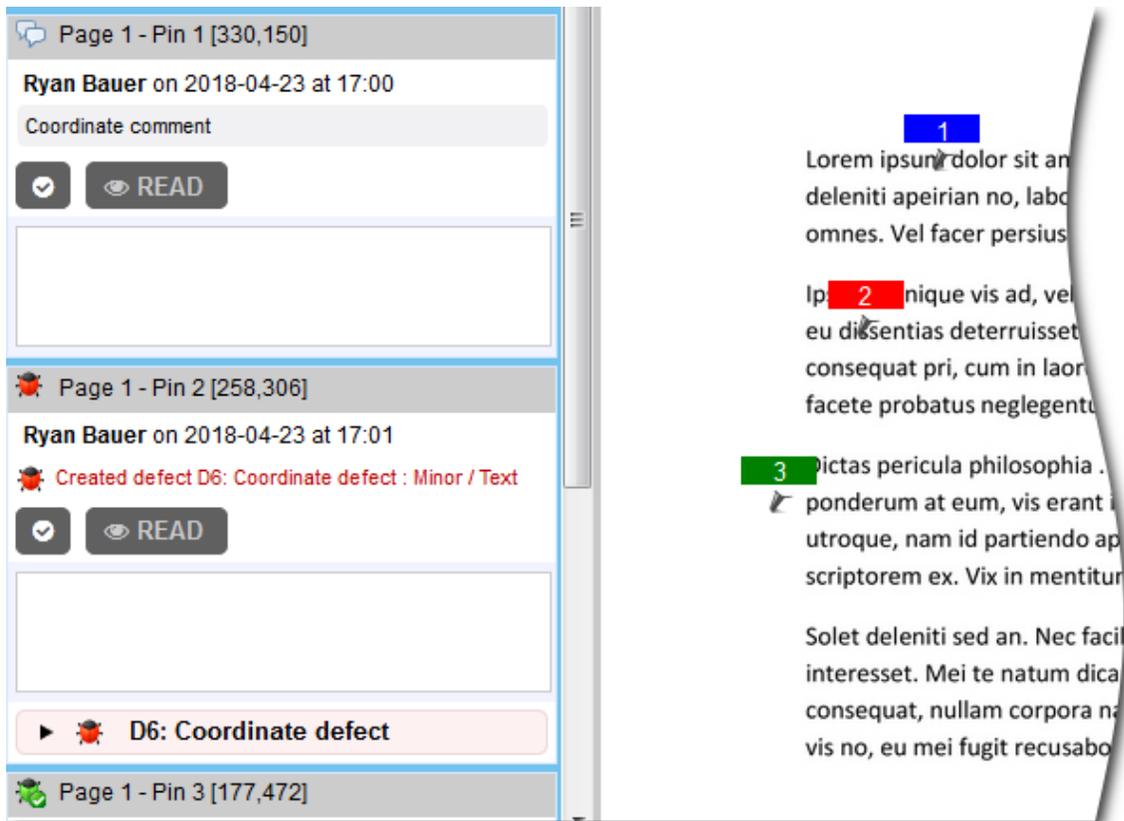
381
382
383
getOptio

To add line comments, click the desired line of text in the content view, type your comment in the text box and click "Add". To add defects, click the desired line of text in the content view, type the defect description, click "Add As Defect" and fill-in the required fields.

Coordinate Comments and Defects (Pushpins)

These comments or defects relate to a particular coordinates within a file. Can be used with word-processing documents, presentations, PDF documents, images and vector graphics. Multiple comments and defects can relate to the same coordinate.

Pushpin comments and defects are displayed in the Chat pane of the [Diff Viewer](#)³³⁹.



To add pushpin comments, click the desired location in the content view, type your comment in the text box and click "Add". To add defects, click the desired location in the content view, type the defect description, click "Add As Defect" and fill-in the required fields.

Pushpins created via Web Client or command-line client display an integer number in their head:

4

The number corresponds to the order in which that pushpin was added to the document page or image.

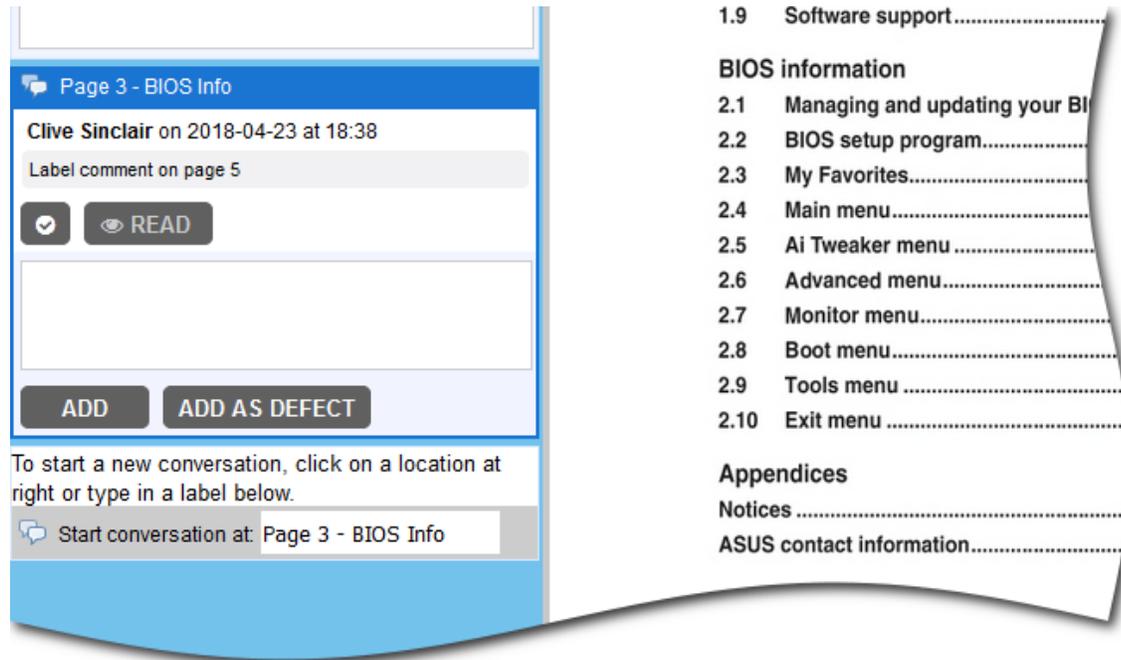
Pushpins created via Eclipse Plug-in do not display any ordinal numbers: 🔍

Label Comments and Defects

These comments or defects relate to an arbitrary label within a file. Can be used with word-processing documents, presentations, PDF documents, images and vector graphics. The label text **must** describe the content (for example, "Section 5.1 on page 23") it relates to. (Since, label comments/defects do not have any other markers that bind the content and the label.) Multiple comments and defects can relate to the same label.

Using labeled locations decreases the confusion that can occur when large changes occur in a document or image resulting in the pushpins not being adjacent to the corresponding context. Label text may not be updated.

Label comments and defects are displayed in the Chat pane of the [Diff Viewer](#)³³⁹.



To add label comments, scroll the Chat pane to the "Start conversation at" box, specify label text and text of the comment and click "Add". To add defects, perform the same steps as for label comments, but click "Add As Defect" and fill-in the required fields.

Cell Comments and Defects

These comments or defects relate to a particular cell within an Excel spreadsheet. Can be used with Excel files and their revisions. Multiple comments and defects can relate to the same cell. Conversations on cells are displayed in alphabetical order by sheet name, not in the sheet order found in the version content. The name of the chat includes the name of the sheet followed by the location of the cell being discussed. For example, 3sheetC10.

Cell comments and defects are displayed in the Chat pane of the [Diff Viewer](#)³³⁹.

To add cell comments, click the desired cell in the content view, type your comment in the text box and click "Add". To add defects, click the desired cell in the content view, type the defect description, click "Add As Defect" and fill-in the required fields.

4.3.9 Review Chats, Comments and Defects

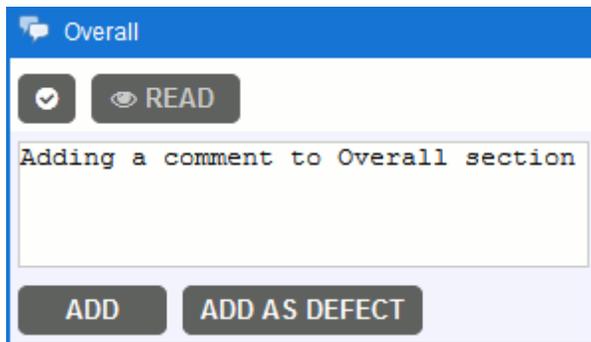
Viewing differences ^[339] between documents is merely the beginning. The key to reviewing documents is communication.

There are various global and content-specific types of comments and defects in Collaborator. See Types of Review Comments and Defects ^[378] for detailed description of each type.

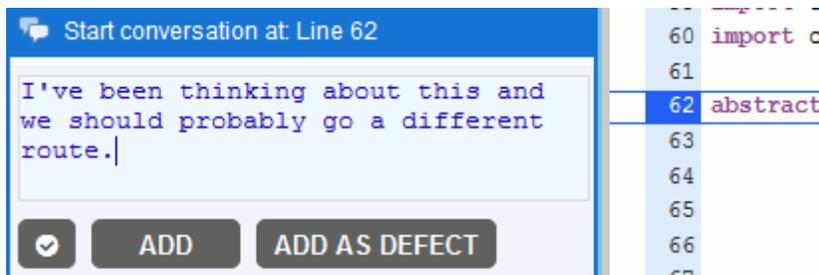
This topic describes how to communicate during a review.

Making Conversation -- Chatting at particular files, lines, coordinates, cells

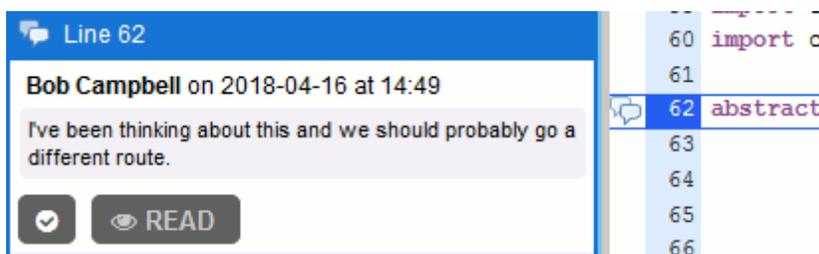
To start a general conversation about some particular file, open the desired file in the Diff Viewer ^[339], type your comment in the Overall section and click **Add**.



To start a conversation about some particular location (line, coordinates, cell), just click the desired location and start typing. The interface will open up automatically and accept your chat message:



When you click **Add**, your message is transmitted to all other users and you have started a *threaded* conversation for that particular location (line, coordinates, cell). In this case, it would look something like this:



Notice how the conversation is now threaded by line 62 and how a little icon  appears next to the source line where the conversation was made.

When you type the name of a file in the same review, it will turn into a link to that file. You can also link to a different line number in the current file by typing "line NNN".

Line 62

Bob Campbell on 2018-04-16 at 14:49
I've been thinking about this and we should probably go a different route.

Bob Campbell on 2018-04-16 at 14:53
For example in `ITextDiffResources.java` at line 119, there's an alternative method.

✓ READ

ADD ADD AS DEFECT

62	abstract
63	
64	
65	
66	
67	
68	stat
	Abstract
69	
70	stat
71	stat

More
More

381
382
383

When another user chats on that same line, that message appears in yellow and yellow bubbles help to make the conversation stand out as needing to be read. The screen updates immediately without the need for a browser "refresh":

⚠ Line 62

Bob Campbell on 2018-04-16 at 14:49
I've been thinking about this and we should probably go a different route.

Bob Campbell on 2018-04-16 at 14:53
For example in `ITextDiffResources.java` at line 119, there's an alternative method.

John Smith on 2018-04-16 at 15:00
That seems like a good idea, let's change this.

✓ READ

ADD ADD AS DEFECT

⚠ 62	abstract
63	
64	
65	
66	
67	
68	stat
	Abstract
69	
70	stat
71	stat

More
More

381
382
383

getOptio

To answer a message, just type your answer in the chat window.

To clear the "unread chat" state without saying something, click the **Read** button (there is also a **Mark all read** button at the bottom of the chat pane):

The screenshot shows a chat window on the left and a diff viewer on the right. The chat window has a yellow header "Line 62". The conversation includes messages from Bob Campbell and John Smith. At the bottom of the chat, there is a "READ" button with an eye icon, which is highlighted with an orange box. Below the chat are buttons for "ADD" and "ADD AS DEFECT". At the very bottom of the chat pane, there is a "Mark all read" button with an eye icon, also highlighted with an orange box, and a "Wrap: Prompt" dropdown menu. The diff viewer on the right shows code changes with line numbers 62 through 71. Line 62 is highlighted in blue and contains the word "abstract". Other lines show "stat" and "Abstract" changes. There are "More" buttons and line numbers 381 and 382 visible at the bottom of the diff viewer.

Accepting Files and Comments

In addition to marking a conversation as read, you can also click the **Mark Accepted** button in the chat to accept the comment or file revision. The **Mark Accepted** button affects conversations/revision that is currently displayed in the After pane of the [DiffViewer](#)³³⁹. The button can be inactive when the conversation/revision is already accepted, or when the revision currently displayed in After pane actually precedes (is earlier than) the revision displayed in Before pane.

The screenshot shows a chat window with a blue header "Overall" and a green checkmark icon. The conversation includes a message from John Smith saying "Well done" and a message from Clive Sinclair saying "** Accepted **". Below the chat, there is a "Mark Accepted" button with a checkmark icon, which is highlighted with an orange box, and a "READ" button with an eye icon.

"Accept" means whatever you want it to mean. If you want, you can never use the Mark Accepted button at all. The actual effect of clicking Mark Accepted on a conversation is to mark that conversation as read, and to put a green check mark  next to that conversation in chat and in the [Review Material](#)^[327] section of the [Review Summary Screen](#)^[316]. Those check marks are visible to all users.

AG	HP	JS	RB	Location
				Overall
				Line 336 
				Overall
				Overall 
				Line 43 
				Line 157 

Conversation status icons in the Review Materials section

Some people use it to mean explicit agreement with the conversation (as opposed to simply not replying, which is implicit agreement).

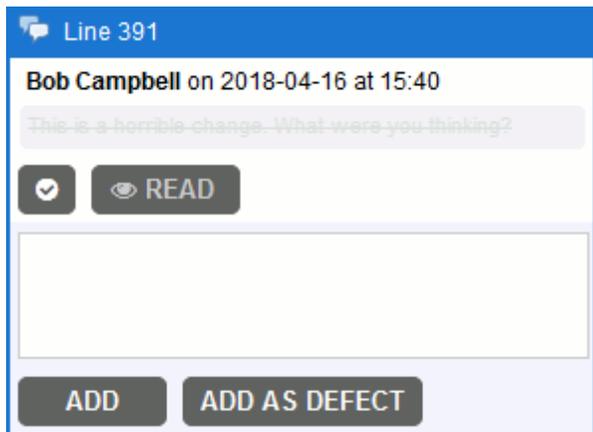
Many people use "Accept" as sort of a bookmark within the review to keep track of what file revisions they have already looked at and agree with its changes. When the author uploads new revision of a file, the  icon will change back to  denoting that the participant has not yet approved this new revision.

Redacting Comments

People have a knack for typing things that for various reasons they should not. When you do this, you can redact your harsh, erroneous or otherwise inappropriate statement by clicking the "X" to the right of your comment. The "X" will appear when you mouse-over the specific comment you would like to redact.



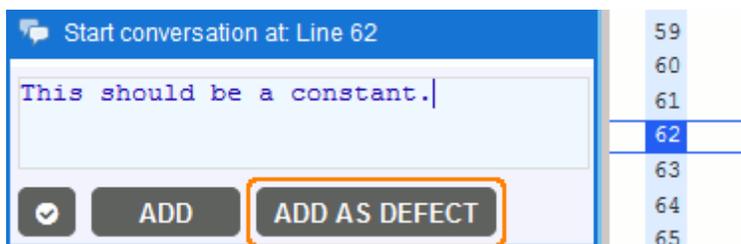
The comment will then be displayed in a much more difficult to read manner.



This styling is meant to deter the casual reader from actually reading the text. You cannot undo redacting a comment. If you have accidentally redacted a comment, you can copy the text from the redacted comment into a new comment. System administrators are allowed to redact any comment. Normal users are allowed to redact comments their own comments.

Creating Defects -- indicating that something is wrong

When you want to indicate that there is a problem that needs to be fixed -- not just more chat -- you open a defect. Do this using the **Add as defect** button below the comment field:



Besides the comment text, defects can have any number of additional fields. These are all completely configurable^[235] by the system administrator and can also vary depending on the review workflow^[310] that was originally selected for the review. Because this is completely configurable, this manual cannot say exactly what the fields will be or what they mean; ask your administrator for details. It is common to see fields like severity, type, checklist item, and phase-injected.

Once the defect is created, it is displayed in the Defect Log^[324] and Review Material^[327] sections of the Review Summary Screen^[316] and in the Chat section of current file. The defect conversation is threaded. Open defects are denoted by red icon :

Every defect is given a unique number, on the server; in the example above the number is D2. There will only ever be a single defect numbered D2, no matter how many defects, documents or reviews exist on the server.

You can have any number of defects on a single line; all will be logged into the list beneath the chat area.

Warning: The word "defect" has many connotations that are inappropriate for peer review. This does not mean the problem will be mirrored in an external issue-tracking system, and it does not necessarily mean it was a bug! Even "bad documentation" can be a defect.

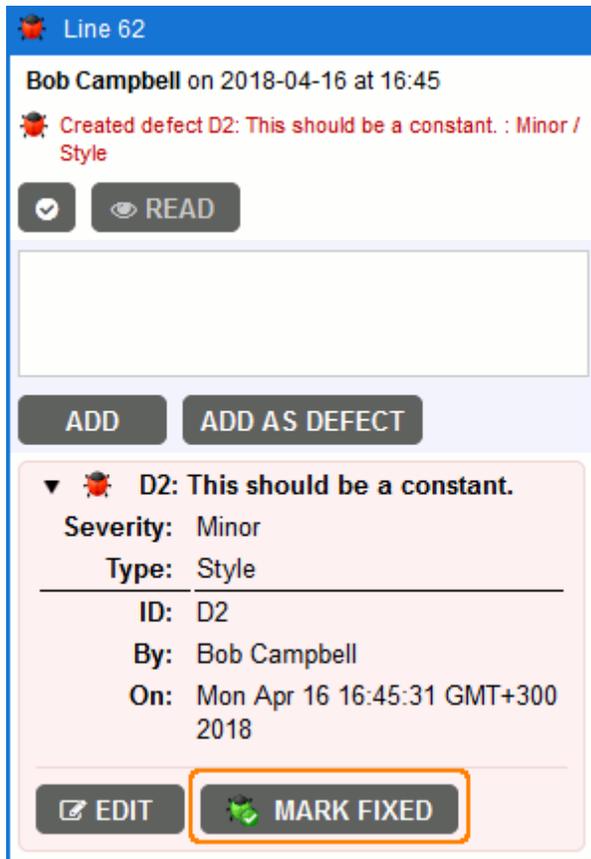
A "defect" is just a way of identifying something that needs to be fixed.

Moreover, if the word "defect" has a negative connotation in your environment, your Collaborator administrator can change it to another term ¹⁷³.

Verifying that defects have been fixed

Later, after the author has attempted to fix the defects and has uploaded the new files to the review, the reviewers will verify that the fixes do fix the defect and do not open more defects in the process.

When the fix is verified, expand the defect log and click the **Mark Fixed** button.



Line 62

Bob Campbell on 2018-04-16 at 16:45

Created defect D2: This should be a constant. : Minor / Style

ADD ADD AS DEFECT

▼  **D2: This should be a constant.**

Severity: Minor
Type: Style

ID: D2
By: Bob Campbell
On: Mon Apr 16 16:45:31 GMT+300 2018

EDIT MARK FIXED

The defect icon will change to green  to denote that the defect have been fixed. The new state of the defect will be reflected in the [Defect Log](#)^[324] and [Review Material](#)^[327] sections of the [Review Summary Screen](#)^[316] and in the Chat section of current file.

Line 62

Bob Campbell on 2018-04-16 at 16:45

Created defect D2: This should be a constant. : Minor / Style

Bob Campbell on 2018-04-16 at 17:31

Marked defect fixed: D2

READ

ADD ADD AS DEFECT

▼ D2: This should be a constant.

Severity: Minor

Type: Style

ID: D2

By: Bob Campbell

On: Mon Apr 16 16:45:31 GMT+300 2018

REOPEN

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If the defect has re-appeared again in some subsequent revisions, you can reopen it by pressing **Reopen**.

Modifying defect information

You can modify defect information by expanding the defect log and clicking **Edit** button.

The screenshot shows a chat window titled "Line 93". A message from "Bob Campbell" on "2018-04-16 at 18:29" states: "Created defect D3: Try to improve section performance. : Minor / Performance". Below the message are "READ" and "ADD AS DEFECT" buttons. A modal window titled "Edit Defect: D3" is open, featuring a trash icon, "Track externally" and "Export issue" options, a text field with the description "Try to improve section performance.", "Severity" (Minor) and "Type" (Performance) dropdown menus, and "OK" and "CANCEL" buttons.

In the edit mode, you can change defect description, modify other defect custom fields, and even delete a defect. Also you can move the defect to external issue tracker (see next section for details on this). All of these activities will be logged into the chat conversation area as an audit trail of what happened.

Warning: It is tempting to delete a defect once the author has corrected the problem, but this is the wrong thing to do. You want to keep the defect record around, just mark it "fixed". This process is described next.

Delete a defect only if it turns out that it really was not a defect at all.

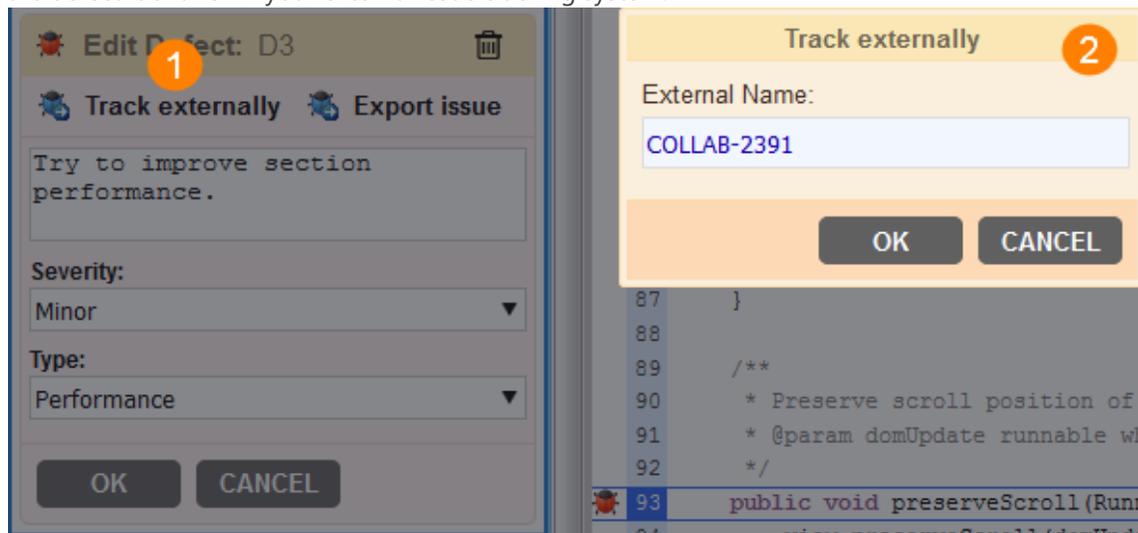
Externalizing defects

Sometimes you decide that a defect should be fixed at a later date. You do not want to mark it fixed because it is not fixed yet. But you do not want to delete it either because it is still a defect.

In this case you can move the defect to the external issue-tracking system and mark the defect as external. This special state tells everyone else that (a) the review can complete but (b) the problem was not fixed during the review and (c) how to find the external issue for further auditing.

You may either create the issue (ticket, work item) manually and link it afterwards, or create new item directly from Collaborator and link it automatically. The latter requires, that your Collaborator administrators setup and configure [issue-tracking integration](#)^[778].

- To link the defect to some existing issue (ticket, work item), press **Track externally** and specify the defect identifier in your external issue tracking system.



- To create a new issue (ticket, work item), press **Export issue** and specify the defect details in the ensuing dialog.

Any of these actions changes the state of the defect from "Open" to "Tracked Externally".

The defect icon will change to blue to denote that the defect have been tracked externally. The new state of the defect will be reflected in the [Defect Log](#)^[324] and [Review Material](#)^[327] sections of the [Review Summary Screen](#)^[316] and in the Chat section of current file.

4.4 Searching & Reporting

Various [reports](#)^[407] and a sophisticated [search](#)^[398] engine help you track reviews completed, reviews in progress, and changes in version control that have not been reviewed.

Collaborator also creates [metrics](#)^[869] reports for things like time spent in reviews, time between phases, kLOC/hour reviewed, defects per kLOC, time per defect, and many others.

Reports can be viewed on-line or exported in a variety of formats. Reports can also be saved and e-mailed.

In This Section

- [Searching From Web UI](#)^[398]
Describes different ways to find a review from the Web Client.
- [Searching Directly From Web Browser](#)^[402]
Describes how to search for Collaborator reviews directly from the browser's address bar or search box.
- [Reporting](#)^[407]
Describes customizable pre-built reports.

4.4.1 Searching From Web UI

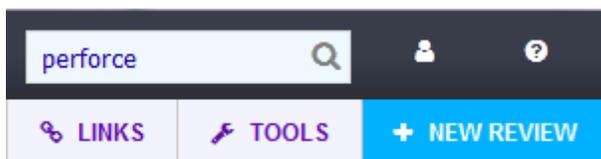
Collaborator has a sophisticated search facility allowing you to find reviews in many ways. Uses include:

- Find reviews by review ID.
- Find reviews with substrings in title and [custom fields](#)^[235].
- Find reviews with specific [participants](#)^[311].
- Find reviews of particular changelists by check-in comment or changelist ID.
- Find reviews of certain files by file path.
- Find reviews having a substring in comment or defect text.

Starting a Search

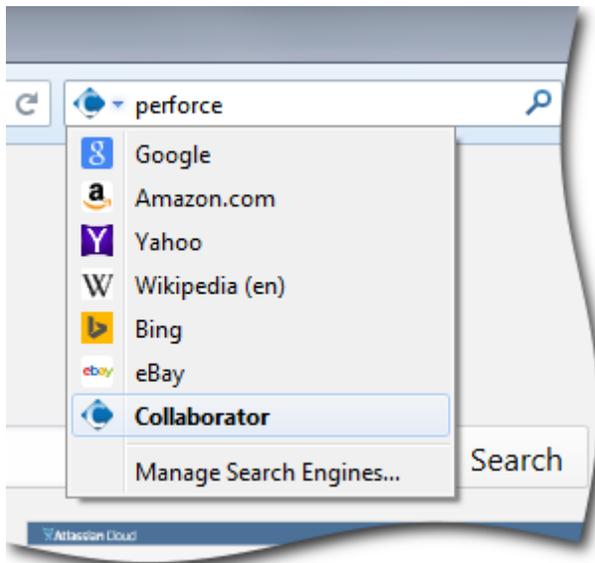
To start a search you can type the search term into any of the following:

- The search box at the left side of the menubar:



Entering search term in Web User Interface

- The address bar or search box of your browser (if your Collaborator server was [added as browser's search provider](#)^[402]):



Entering search term in Mozilla Firefox

The system will automatically search in all the ways listed above.

If you have entered the review ID number, you will automatically be taken to review. See [Jumping to Reviews](#)^[401] section for details.

Search Results

The number of displayed search results will be limited if the search produces too many results. The default number displayed will usually be "10". This can be changed in the form that will appear at the top of the search results. To display more or less than shown, change the value in the **Number of search results** field and click **Search**.

Search Results for: perforce

Search text:	<input type="text" value="perforce"/>
Number of search results:	<input type="text" value="10"/>

Important: On Oracle databases, Collaborator does not search the contents of custom fields by default (since this significantly reduces search performance). Instead, the search results page display additional fields that define in what areas to perform new search. In this panel you can enable searching in custom fields.

Search Results for: test

Search text:

Number of search results:

In Reviews: Title
 Creator
 Custom fields

In Changelists: Comments
 Authors
 SCM identifiers

In Files: File names

In Defects: Text
 Custom fields

In Comments: Conversations

Because there are many types of searching, each result block is drawn separately. For example, below are the results of searching inside review title and custom field text:

▼ **Reviews matching substring (10+ results)**

Too many results; displaying most recent 10.

Reviews where the substring matches review title, review creator, or any review custom fields. (Custom fields not displayed here)

Review ID	Created On	Creator	Review Title
5696	2011-10-12 13:12	Luis Luna	perforce shelve sets and p4 change content trigger (cases 55167, 59145, 59637)
5660	2011-10-04 16:28	Luis Luna	added - support for perforce shelve sets
5071	2010-12-03 15:24	Will West	Ensure Diffs Reviewed Trigger for Perforce
4967	2010-10-21 16:01	Will West	support perforce versioned symlinks on linux w/ coreutils installed
4898	2010-09-22 16:09	Will West	internal - perforce \r\n line ends add extra blank lines
4704	2010-07-23 11:17	Will West	option to force perforce history by path

Note several features of the search results:

- Text at top of the block explains exactly what the block is searching on.
- Reviews are displayed in creation-date order, most recent first.
- Specific search term is highlighted in yellow.
- Jump to a review by clicking the ID link.
- When there are many results, a message appears near the top in green.

You may notice that some reviews do *not* have the yellow highlight. Why did these reviews match the search? This search looks not only at the review title and participants but also in all custom fields. Those fields are not, however, displayed in this view, so nothing can be highlighted. (Custom fields are not shown because there can be a large number of them which would make the search results difficult to read.)

Here is another example where the block is searching over files present in the review:

Files matching substring (10+ results)

Too many results; **displaying most recent 10.**

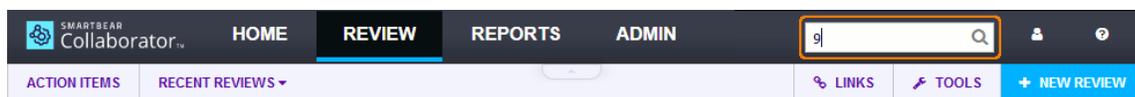
Reviews where at least one file matches the string as a substring

Review	Path	Version	Change
Review #5938: Untitled Review	scm/src/main/java/com/smartbear/scm/impl/perforce/PerforceSystem.java	local	On 2011-11-11 Uploaded f... commit 739... Author: Lu... Date: Mon... (case 6025... renames" f...
Review #5938: Untitled Review	ccollab-test/src/test/java/com/smartbear/scm/impl/perforce/P4CommandLineTestClient.java	local	On 2011-11-11 Uploaded f... commit 739... Author: Lu... Date: Mon... (case 6025... renames" f...
Review #5938: Untitled Review	ccollab-test/src/test/java/com/smartbear/scm/impl/perforce/P4CommandLineTestClient.java	local	On 2011-11-11 Uploaded f... commit 739... Author: Lu... Date: Mon... (case 6025... renames" f...

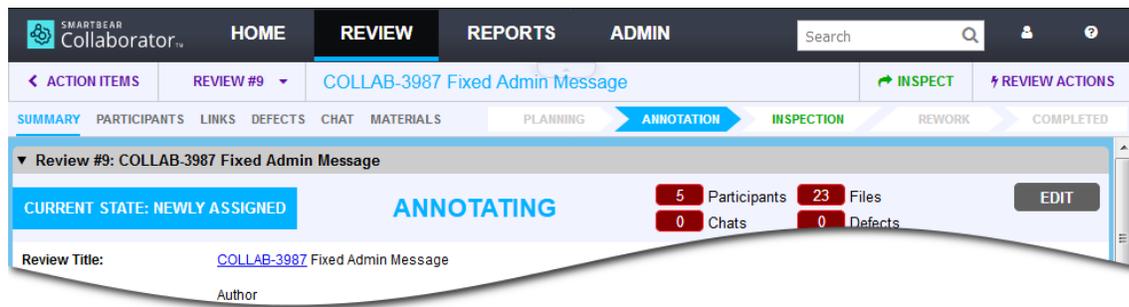
Jumping to Reviews

You can jump to a review by entering the unique review ID number into the search box. If the number entered matches a review ID number, you will automatically be taken to review. This allows you to bypass search results and quickly find the searched review.

Enter the Review ID number into the search box on the Home page and press Enter:



The specified review will be displayed in the Review screen:



4.4.2 Searching Directly From Web Browser

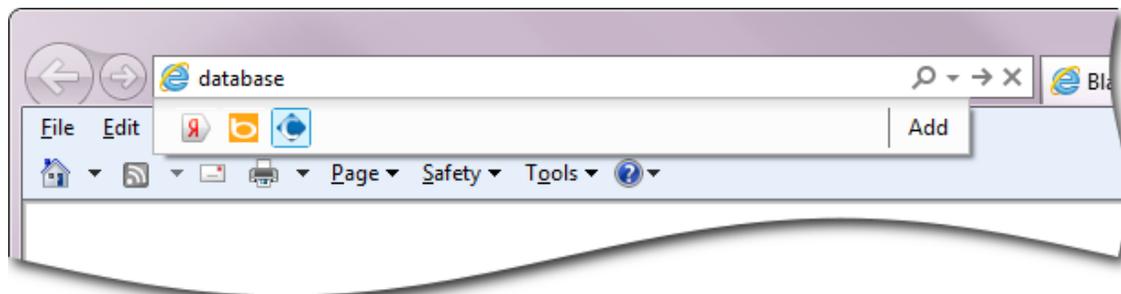
You can add Collaborator to the list of search engines of your browser. In this case you can search for reviews, participants, files and other directly from your browser's address bar or search box.

How it works

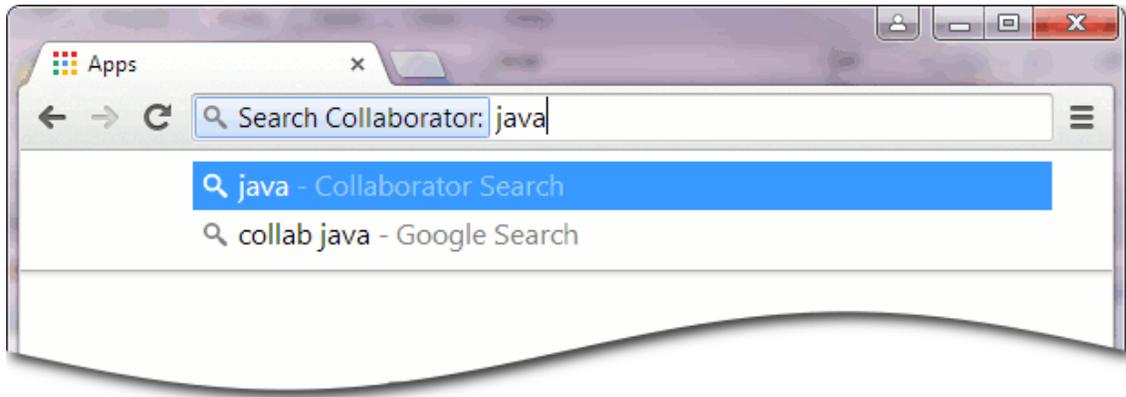
To perform a search in Collaborator from within the web browser, we need to add your Collaborator server as the browser's search provider. (See instructions [below](#)^[402].)

Once this is done, you can open any arbitrary web page (not necessary from Collaborator Web UI) and enter the desired search term in the browser's address bar or search box.

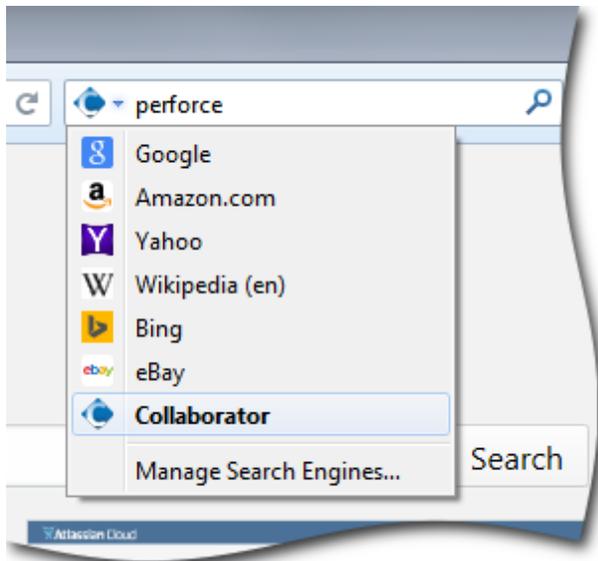
Then you need to select Collaborator as the search provider (if it is not set as the default provider) and press Search.



Entering search term in Internet Explorer



Entering search term in Google Chrome



Entering search term in Mozilla Firefox

Your Collaborator server will perform a search and display search results for the given term.

The screenshot shows a web application search interface. At the top, there is a search bar with the text 'java' entered. To the right of the search bar are three icons: 'Refresh', 'Reports', and 'Log Off'. Below the search bar, the text 'Search Results for: java' is displayed. A form contains the search text 'java' and the number of search results '10'. There are two buttons: 'SEARCH' and 'REVERT'. Below the form, a section titled 'Reviews matching substring (10+ results)' is shown. A message states 'Too many results; displaying most recent 10.' Below this, a table lists reviews where the substring matches the review title, review creator, or any review custom fields. The table has four columns: Review ID, Created On, Creator, and Review Title. The first three rows are visible:

Review ID	Created On	Creator	Review Title
10597	2015-02-07 02:48	Ruhong Cai	COLLAB-815 9100:Command "login", "batch", "Info" and refactor Command.java
10523	2015-01-15 01:51	Mike Jackson	collab 748 and collab 751 doc tweaks
10521	2015-01-12 21:24	Mike Jackson	COLLAB-745 javadoc fixes for

Results of Collaborator search

Adding Collaborator as Browser's search engine

Collaborator uses the OpenSearch technology to act as the browser's search provider. The exact instructions on adding custom OpenSearch providers depends on a browser. Below are instructions for the most popular browsers.

Internet Explorer:

1. Create a *.reg file with the following content:

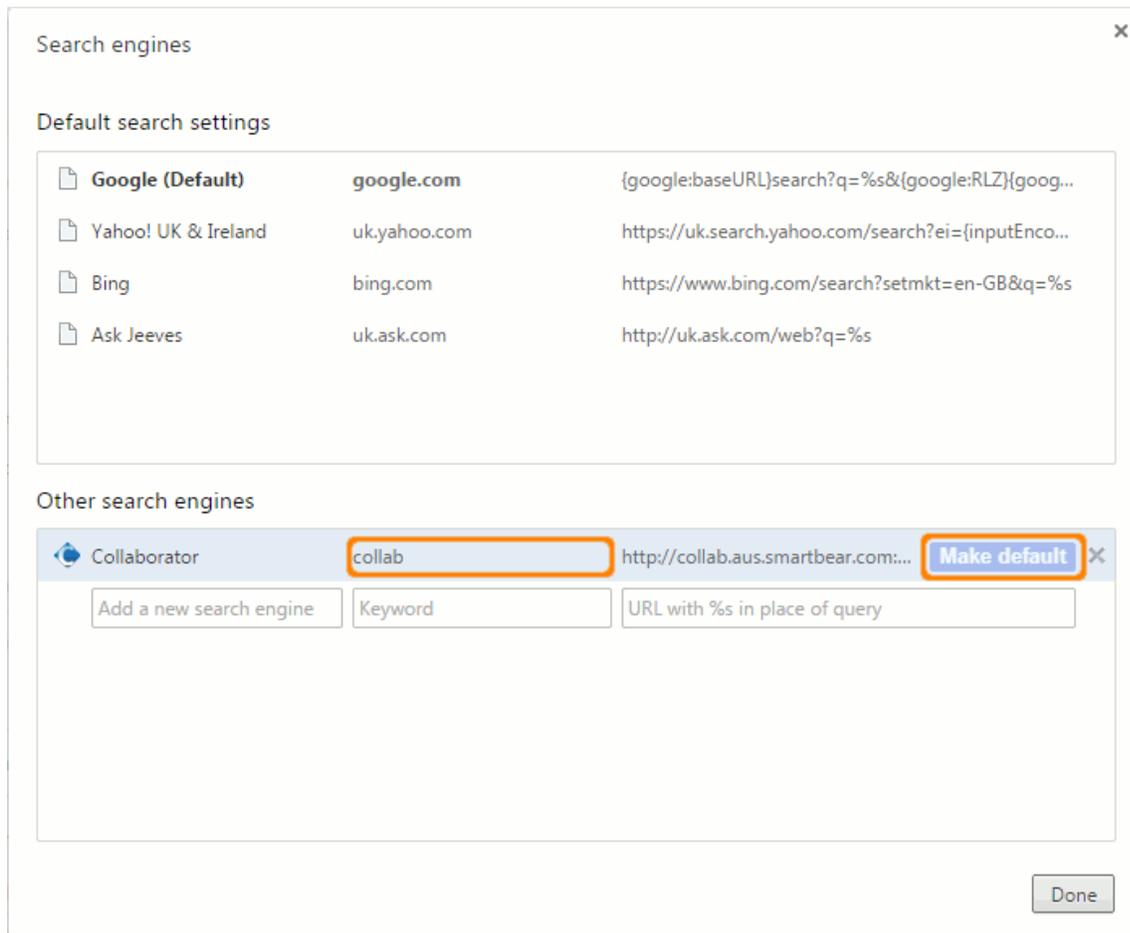
```
Windows Registry Editor Version 5.00

[HKEY_CURRENT_USER\Software\Microsoft\Internet Explorer\SearchScopes
\Collaborator]
"DisplayName"="Collabortor"
"URL"="http://yourServer.com/go?page=SuperSearch&superSearchField=
{searchTerms}"
"FaviconPath"="C:\\loc1PathToFavicon\\CC.ICO"
"FaviconURLFallback"="http://yourServer.com/i/cc.ico"
```

2. Change ***http://yourServer.com*** to the actual URL of your Collaborator server (including the protocol name: http or https).
3. Save the file and run it.
4. Confirm to make changes to the registry.
5. (Optional) Open Internet Explorer, go to **Tools | Manage Add-ons | Search Providers**, and set Collaborator as the Default Search Provider.

Google Chrome:

1. Navigate to navigate to the URL of the Collaborator Web Client.
2. Click Chrome menu.
3. Select Settings.
4. Go to the "Search" section.
5. Press "Manage Search Engines".
6. Under "Other search engines" select "Collaborator"

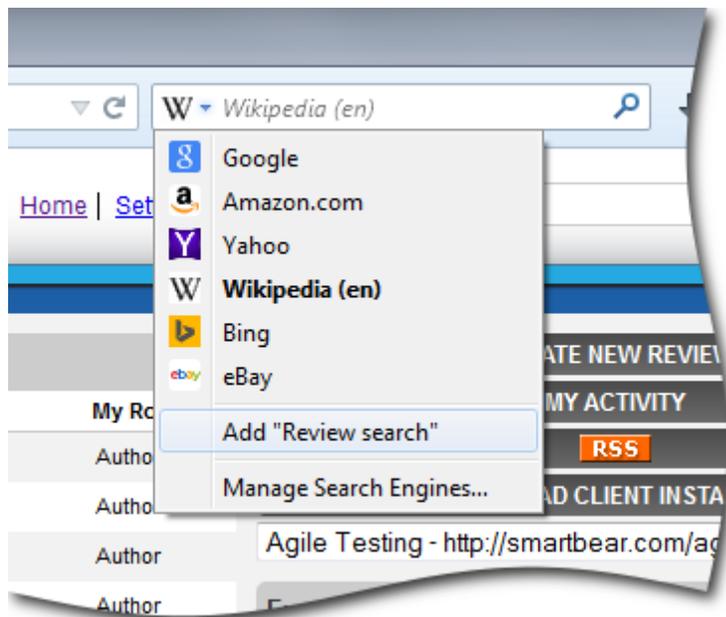


7. Specify a more memorable text shortcut for the Keyword field. That is, instead of the full URL of your Collaborator server enter, for example, "collab". Keywords are entered in the address bar to denote which of search engines to use.
8. Press "Make default". This will add your Collaborator server as the default search engine.
9. Press Done and close Chrome settings.

Later on you may restore your default search engine and use the specified keyword to search for the term on your Collaborator server.

Mozilla Firefox:

1. Navigate to navigate to the URL of the Collaborator Web Client.
2. Open the search engine list and select "Add Review search". Firefox will add it to your list and make it the active search engine.



4.4.3 Reporting

Collaborator has a number of customizable pre-built reports.

Note: Support of pre-built reports varies depending on Collaborator edition. Collaborator Community has only basic reports, while Collaborator Team and Collaborator Enterprise have all types of pre-built reports. For a complete list of differences between Collaborator editions, please see the [comparison page](#)^[34]

To access the customizable pre-built reports, click the Reports menubar option:



If you are not an administrator, you may or may not have access to view reports depending on the [Reports Access](#)^[175] setting.

The pre-built reports are divided into the following groups:

- [Customizable Review Reports](#)^[408] - generate a list of reviews that meet certain requirements (reviews having the specified phase, status, duration and so forth).
- [Review Detail Reports](#)^[412] - display detailed information about a particular review.
- [Customizable Defect Reports](#)^[414] - generate a list of defects that meet certain requirements.

- [Customizable User Reports](#)^[417] - generate a list of users that meet certain requirements.
- [List Reports](#)^[419] - generate lists of users and SCM changes.

Additionally, you can retrieve data from Collaborator database and [create your own custom reports](#)^[807] using an external reporting tool such as Excel, Access, Crystal Reports, or Business Objects. For further information on this approach, see [Creating Custom Reports](#)^[806].

4.4.3.1 Customizable Review Reports

This group of pre-built reports generate a list of reviews that meet certain requirements. Currently it includes the following review list reports:

- **Reviews Currently In Progress** - Reviews in Planning, Inspection, or Rework phases.
- **My Reviews, Currently In Progress** - Reviews you're participating in which are currently in Planning, Inspection, or Rework phases.
- **Recently Completed Reviews** - Reviews completed normally (that is, not cancelled or rejected).
- **Stalled Reviews** - Reviews where no communication has happened for a while.
- **Trivial Reviews** - Reviews completed normally but too quickly to have been done properly.

Once you click on a report name, you will be directed to a page where you can tailor the report to your preferences.

This documentation uses the default names of review fields, columns and options. On your Collaborator server this information may vary, depending on server configuration: display labels, role names, review custom fields and so on.

The options are divided into several groups: Columns, Filters and Options.

Columns

Columns	
ID: <input checked="" type="checkbox"/>	Review Title: <input checked="" type="checkbox"/>
Review Creation Date: <input checked="" type="checkbox"/>	Review Completion Date: <input type="checkbox"/>
Group: <input type="checkbox"/>	Workflow: <input type="checkbox"/>
Phase: <input type="checkbox"/>	Review is Private: <input type="checkbox"/>
Creator Login: <input type="checkbox"/>	Creator Full Name: <input type="checkbox"/>
Moderator Login: <input type="checkbox"/>	Moderator Full Name: <input type="checkbox"/>
Author Login: <input type="checkbox"/>	Author Full Name: <input checked="" type="checkbox"/>
Reviewer Login: <input type="checkbox"/>	Reviewer Full Name: <input type="checkbox"/>
Observer Login: <input type="checkbox"/>	Observer Full Name: <input type="checkbox"/>

In this section you can select which of the fields to include in the generated report. Thus you can choose how much or how little you view in the report.

Typically the following column names are displayed:

ID	The unique identifier of the review.
Review Title	The title of the review.
Review Creation Date	Date and time, when the review was created.
Review Completion Date	Date and time, when the review was finished. Empty for in progress reviews.
Group	Name of a group of users associated with the review.
Template	Name of a workflow template associated with the review.
Phase	Current phase of the review.
Restrict Access	Who can access this review.
Creator Login, Creator Full Name	The login and full name of a person who created review. Creator may be a different person than a review author.
Author Login, Author Full Name	The login and full name(s) of review authors.
Reviewer Login, Reviewer Full Name	The login and full name(s) of reviewers.
Observer Login, Observer Full Name	The login and full name(s) of review observers.
Moderator Login, Moderator Full Name	The login and full name(s) of review moderators.
Defect Count	Total number of found defects.
Defects Per Hour	How much defects were found by reviewers in one hour.
Open Defect Count	Total number of open defects.
Comment Count	Total number of comments made.
Last Comment	Date and time, when the last comment was made.

Idle For	Time since any activity has occurred in a review.
File Count	Total number of files uploaded to the review.
LOC (Uploaded)	Total number of lines in all files.
LOC Added	Total number of lines added
LOC Removed	Total number of lines deleted
LOC Changed	Total number of lines with modifications
LOC Delta	Change in line count, that is, lines added minus lines removed.
LOC Reworked	Total number of all reworked lines (added + removed + changed).
Review Wall-Clock Duration	How much time has passed since the review was created and till the review was completed (or now, if the review is still in progress).
Total Person-Time	The total of all recorded time that all participants were looking at review.
Reviewer Time	The total of all recorded time that all reviewers were looking at review.
Author Time	The total of all recorded time that all authors were looking at review.
Number of Participants	Total number of review participants.
Average Participant Time	An average time each participant was looking at review.
Overview	A detailed description of the review.
<Review Custom Field>	Value of any other review custom field.

Filters

In the Filters section you can define which reviews to include or exclude from the report. Most of the fields that Collaborator can display (see Columns section), can also act as filter fields.

You can specify one or more conditions and Collaborator will show only those reviews that match these criteria. For instance, show reviews of some particular user, reviews created in certain time period, reviews whose title contains particular word and so on.

When several conditions are given, the report displays data that matches all of the specified conditions.

Filters	
Participant: -- Select --	ID: ...
Review Title: Contains	Review Creation Date: ...
Review Completion Date: ...	Template: Contains
Group: -- Select -- Only this group	Phase: In Progress (in Review, Planning or Annotating)
Restrict Access: -- Select --	Creator: -- Select --
Moderator: -- Select --	Author: -- Select --
Reviewer: -- Select --	Observer: -- Select --
Defect Count: ...	Open Defect Count: ...

Options

In the Options section you can specify how the found data is sorted, entitled and divided into pages. A report has a limit on the maximum number of rows that can be displayed: 50 rows by default. You can change the number in the "Max # Rows" field. When you export report data to CSV, SQL or print the report all rows are exported/printed regardless of this option value.

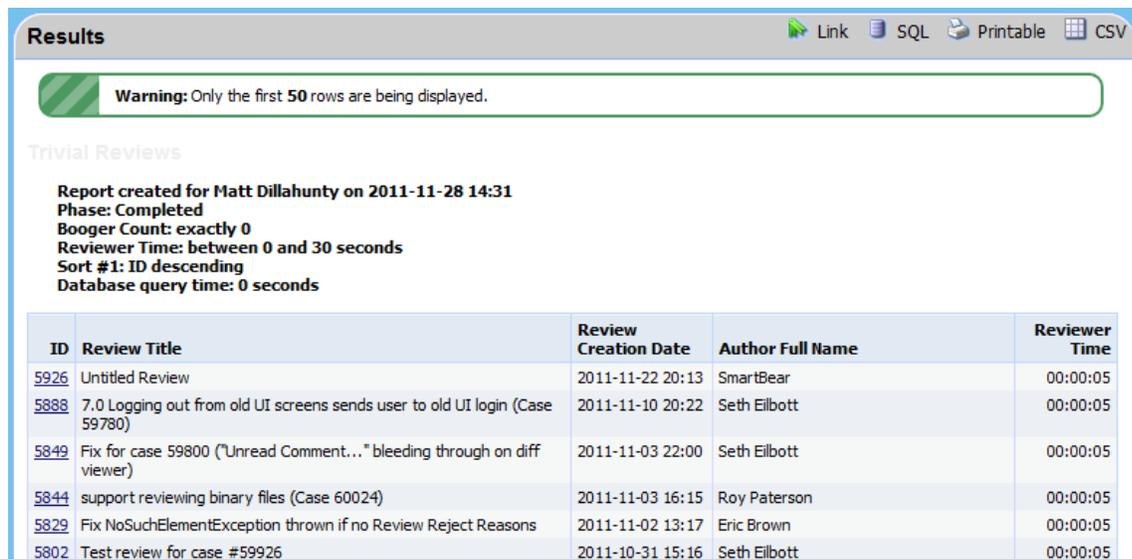
Options	
Sort Ordering #1: Descending ID	Sort Ordering #2: Ascending --Select--
Report Title: Trivial Reviews Text to display as the title of the report	Max # Rows: 50 When querying from export format (e.g. CSV, Printable) there is no limit on the number of rows.

Generating Reports

To generate any report from this group:

1. Choose the type of a report that you need and click its name.
2. Specify the desired options for the report: column set, filters, sorting and so on. To reset the report options and filters, press **Revert** button.
3. Click **Run** button to generate the report with the specified criteria and parameters.

The report will be displayed in the Results pane in the bottom of the page.



Results Link SQL Printable CSV

Warning: Only the first 50 rows are being displayed.

Trivial Reviews

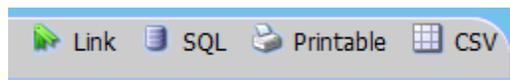
Report created for Matt Dillahunty on 2011-11-28 14:31
Phase: Completed
Booger Count: exactly 0
Reviewer Time: between 0 and 30 seconds
Sort #1: ID descending
Database query time: 0 seconds

ID	Review Title	Review Creation Date	Author Full Name	Reviewer Time
5926	Untitled Review	2011-11-22 20:13	SmartBear	00:00:05
5888	7.0 Logging out from old UI screens sends user to old UI login (Case 59780)	2011-11-10 20:22	Seth Eilbott	00:00:05
5849	Fix for case 59800 ("Unread Comment..." bleeding through on diff viewer)	2011-11-03 22:00	Seth Eilbott	00:00:05
5844	support reviewing binary files (Case 60024)	2011-11-03 16:15	Roy Paterson	00:00:05
5829	Fix NoSuchElementException thrown if no Review Reject Reasons	2011-11-02 13:17	Eric Brown	00:00:05
5802	Test review for case #59926	2011-10-31 15:16	Seth Eilbott	00:00:05

Exporting Reports

To export any report from this group:

1. Generate the desired report as described above.
2. Click one of the toolbar buttons in the top right of the Results box:



- The **Link** button will bring up a pop-up window with a direct link to the current customized report (with all the current options and filters preserved). You can bookmark this link to use whenever you want to revert back to the review configuration.
- The **SQL** button will display an SQL query that was used to generate the current report. You can use this SQL query when [creating custom reporting tool](#).
- The **Printable** button will prepare the report in a printable format.
- The **CSV** button will export the report in comma-separated values format. Note the **CSV** output format does not consume a license.

4.4.3.2 Review Detail Reports

This group of pre-built reports display information about a particular review. Currently it includes the following reports:

- **Brief Summary** - One-page summarization of the review.

- **Detailed Report** - Complete log of the review.

Tip: Another way to open the Brief Summary report for a specific review is to click the Details button in the [Review Summary Screen](#)³²⁰.

Once you click on a report name, you will be directed to a page where you can tailor the report to your preferences.

You will need to specify the following options:

Review ID	The unique identifier of the review.
Defects Section Format	Specifies whether to display the Defects section and its format.
Materials Section Format	Specifies whether to display the Materials section and its format.
Checklist History	Specifies whether to display the Checklist History section.
Comments Section Format	Specifies whether to display the Comments section and its format.
File Activity Section	Specifies whether to display the File Activity section and its format.

Of these options, the Review ID number is required, other options have pre-defined values.

Generating Reports

To generate any report from this group:

1. Choose the type of a report that you need and click its name.

2. Specify the desired options for the report. To reset the report options and filters, press **Revert** button.
3. Click **Run** button to generate the report with the specified criteria and parameters.

The report will be displayed in the Results pane in the bottom of the page.

Exporting Reports in Printable Format

To export any report from this group:

1. Generate the desired report as described above.
2. Click the **Printable** button in the top right of the Report Options box.

4.4.3.3 Customizable Defect Reports

This group of pre-built reports generate a list of defects that meet certain requirements. Currently it includes the following review list reports:

- **All Defects** - List of all defects from all reviews.
- **My Recent Defects** - List of defects you created recently.
- **My Open Defects** - List of defects you created and that are still open.

Once you click on a report name, you will be directed to a page where you can configure the criteria for the defect reports.

This documentation uses the default names of defect fields, columns and options. On your Collaborator server this information may vary, depending on server configuration: display labels, role names, review custom fields and so on.

The options are divided into several groups: Columns, Filters and Options.

Columns

In this section you can select which of the fields to include in the generated report. Thus you can choose how much or how little you view in the report.

Typically the following column names are displayed:

Defect ID	The unique identifier of the defect.
-----------	--------------------------------------

State	The state of the defect: Open, Fixed or Tracked Externally.
Review ID	The unique identifier of the review to which the defect belongs.
Review Title	The title of the review to which the defect belongs.
Review Group	Name of a group of users associated with the review.
Review Creation Date	Date and time, when the review was created.
Review Completion Date	Date and time, when the review was finished. Empty for in progress reviews.
Created	Date and time, when the defect was created.
Creator Login, Creator Full Name	The login and full name of a person who created the defect.
File	Full name of a file to which the defect belongs.
File Version	The ID of file revision where the defect was found, or "unversioned" if the file is not under SCM.
Changelist ID	The ID of a changelist that contains the file where the defect was created. Empty if the file is not under SCM.
Changelist Date	Date and time, when the changelist was created.
Changelist Author	Name of a person who uploaded the changelist.
Changelist Comment	The comment of a changelist.
SCM Type	Type of a version control system.
Location	Location for context specific defects.
LocatorType	Type of the defect: Global, Annotation, Overall for File Revision or URL, Line, Coordinate, Label, Cell. See Types of Review Comments and Defects ^[378]
Comment	Comment that relates to the defect.
External Name	Name assigned to the defect in the external issue tracker system.
Severity	Indicates how critical the defect is.
Type	Indicates the type of found defect.

<Defect Custom Field> Value of any other defect custom field.

Filters

In this section you can define which defects to include or exclude from the report. Most of the fields that Collaborator can display (see Columns section), can also act as filter fields.

You can specify one or more conditions and Collaborator will show only those reviews that match these criteria. For instance, show defects in some particular state, defects created in certain time period, defects whose comment contains particular word and so on.

When several conditions are given, the report displays data that matches all of the specified conditions.

Options

In the Options section you can specify how the found data is sorted, entitled and divided into pages. A report has a limit on the maximum number of rows that can be displayed: 50 rows by default. You can change the number in the "Max # Rows" field. When you export report data to CSV, SQL or print the report all rows are exported/printed regardless of this option value.

Generating Reports

To generate any report from this group:

1. Choose the type of a report that you need and click its name.
2. Specify the desired options for the report: column set, filters, sorting and so on. To reset the report options and filters, press **Revert** button.
3. Click **Run** button to generate the report with the specified criteria and parameters.

The report will be displayed in the Results pane in the bottom of the page.

Exporting Reports

To export any report from this group:

1. Generate the desired report as described above.
2. Click one of the toolbar buttons in the top right of the Results box:



- The **Link** button will bring up a pop-up window with a direct link to the current customized report (with all the current options and filters preserved). You can bookmark this link to use whenever you want to revert back to the review configuration.
- The **SQL** button will display an SQL query that was used to generate the current report. You can use this SQL query when [creating custom reporting tool](#)^[806].
- The **Printable** button will prepare the report in a printable format.
- The **CSV** button will export the report in comma-separated values format. Note the **CSV** output format does not consume a license.

4.4.3.4 Customizable User Reports

This group of pre-built reports generate a list of users that meet certain requirements. Currently it includes the following review list reports:

- **Enabled Users** - List of users who are allowed to log into Collaborator server
- **Disabled Users** - List of users who are no longer allowed to log into Collaborator server
- **Administrators** - List of active administrator accounts
- **All Users** - List of users that have been created in the system
- **Activity This Week** - List of users who were active in reviews this week
- **Activity Last Week** - List of users who were active in reviews last week
- **User Detail Report** - Detailed report of user information

Once you click on a report name, you will be directed to a page where you can configure the criteria for the user reports.

All reports from this group, except for the User Detail Report, have the options divided into several groups: Columns, Filters and Options. Whereas, the User Detail Report has only one group of options.

Columns

In this section you can select which of the fields to include in the generated report. Thus you can choose how much or how little you view in the report.

Typically the following column names are displayed:

ID	The unique identifier of the user.
Login	User login
Name	User full name
E-mail	User e-mail address.
Phone	User phone number.
Last Login	Date and time, when the user has logged in last time.
Last Activity	Date and time, when the user has performed any actions on Collaborator server.
Last Logout	Date and time, when the user has logged out last time.
Admin	Indicates whether the user is an administrator.
Enabled	Indicates whether the user is enabled.
User Activity	Duration of user activity in the given time period.

Filters

In this section you can define which users to include or exclude from the report. Most of the fields that Collaborator can display (see Columns section), can also act as filter fields.

You can specify one or more conditions and Collaborator will show only those reviews that match these criteria. For instance, show users that belong to some particular group, users who were active in last week and so on.

When several conditions are given, the report displays data that matches all of the specified conditions.

Options

This section allows you to edit the sorting, title, and number of rows of the displayed report. A report has a limit on the maximum number of rows that can be displayed: 50 rows by default. You can change the number in the "Max # Rows" field. When you export report data to CSV, SQL or print the report all rows are exported/printed regardless of this option value.

User Detail Report Options

The User Detail report has only two options:

Participant	The full name and login of the desired user.
Activity Period	Time period for which to generate the user activity report.

Generating Reports

To generate any report from this group:

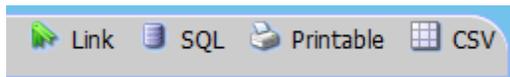
1. Choose the type of a report that you need and click its name.
2. Specify the desired options for the report: column set, filters, sorting and so on. To reset the report options and filters, press **Revert** button.
3. Click **Run** button to generate the report with the specified criteria and parameters.

The report will be displayed in the Results pane in the bottom of the page.

Exporting Reports

To export any report from this group:

1. Generate the desired report as described above.
2. Click one of the toolbar buttons in the top right of the Results box:



- The **Link** button will bring up a pop-up window with a direct link to the current customized report (with all the current options and filters preserved). You can bookmark this link to use whenever you want to revert back to the review configuration.
- The **SQL** button will display an SQL query that was used to generate the current report. You can use this SQL query when [creating custom reporting tool](#).
- The **Printable** button will prepare the report in a printable format.
- The **CSV** button will export the report in comma-separated values format. Note the **CSV** output format does not consume a license.

4.4.3.5 List Reports

This group of pre-built reports generate various types of data about Collaborator users and source control management integration. They include the following reports:

- **User List** - List of users in the system and when they last accessed the server

- **Reviews by Changelist** - List of reviews in the system, organized by SCM changelists present in the review
- **Changes List** - List of SCM changes in the system
- **Changes, Unreviewed** - List of SCM changes that have been submitted but not yet reviewed

Once you click on a report name, you will be directed to a page where you can configure the criteria for the user reports.

Each list report has the same basic structure. In the upper part it contains several filter fields and in the lower part it displays a table that lists the users, changes or reviews that match the specified criteria.

User List Report

This report lists the users registered on the current Collaborator server and indicates whether the user is active and when they last accessed the server. By default the report lists all the users. To filter the user list, enter a value into the User Login or User Full Name fields. In this case the report will list only the users whose login or full name contain the specified value.

Reviews by Changelist Report

This report lists the reviews having SCM changelists linked to the review. By default the report lists the reviews changed during the current week. To specify another time period for the changes, enter the desired values into the Start Date and End Date fields. To filter the review list, enter a value into the Change List Author or Changelist ID fields. In this case the report will list only the changelists whose author or ID contain the specified value.

Changes List Report

This report lists the SCM changes linked to the review. By default the report lists the changes made during the current week. To specify another time period for the changes, enter the desired values into the Start Date and End Date fields.

Changes, Unreviewed Report

This report lists the changes that have been submitted to SCM but have not yet been reviewed. By default the report lists the changes made during the current week. To specify another time period, enter the desired values into the Start Date and End Date fields. To filter the changes list, enter a value into the Author or Changelist ID fields. In this case the report will list only the changes whose author or ID contain the specified value.

Generating Reports

To generate any report from this group:

1. Choose the type of a report that you need and click its name.
2. (Optional.) Specify the desired filter conditions. To reset the report options and filters, press **Revert** button.
3. Click **Update** button to generate the report.

The report will be displayed in the bottom of the page.

Reviews by Changelist

Report data is cached for paging and faster access. To update the data, click the Update button below. Refresh will not necessarily update the data.
This report was generated at 2014-10-15 17:19

Start Date:	2014-06-08	8	
End Date:	2014-10-16	8	
Change List Author:			
Changelist ID:			

UPDATE
REVERT

<< First < Prev [Next](#) > Last >>
Showing Page 1 of 20

Export to: [CSV](#) [PDF](#) [Excel](#)

Reviews by Changelist

Change	Review	Title	Phase	Changelist Author	Changelist Date
f8cc5f5638d4af8a1454460b4bb4d...	10363	86046c6b92416d4072db5df55abd8e2de7fa68d3 - fixed --- Web UI Slow loading additional lines of code when p4protects is enabled (Case COLLAB-634)	Completed	Luis Luna	2014-10-08 02:37
f873c6ac1432a0ae2df71486a0d5a...	10271	f873c6ac1432a0ae2df71486a0d5adcd736b3b47 - (internal) Automate webapps/work file cleanup (Case COLLAB-482)	Completed	Luis Luna	2014-08-05 11:33

Warning: Report data is cached by the server automatically. This makes it fast to page through data, but can be confusing since data is not updated automatically when you just refresh the page.

To "really" refresh data, click the **Update** button under the list of filters.

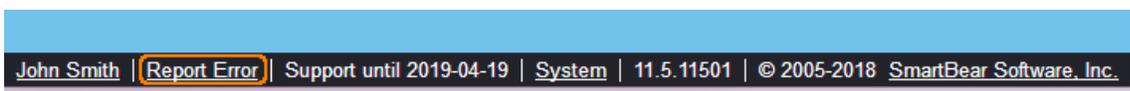
Exporting Reports

To export any report from this group into CSV, PDF, or Excel formats. Just click the appropriate link under the filters.

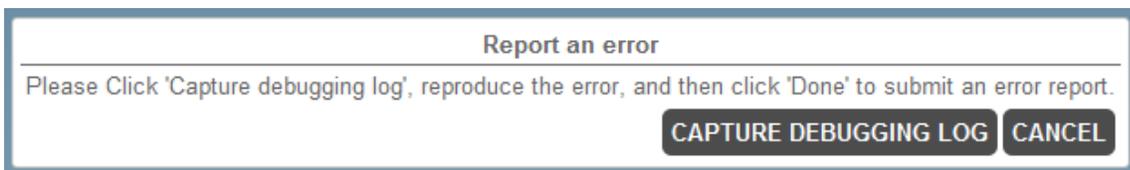
4.5 Troubleshooting

Collaborator has a new debugging feature which makes gathering support logs easy.

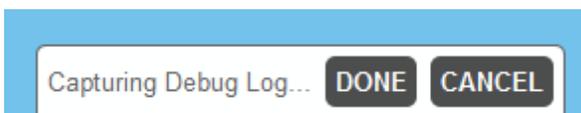
The first step is to click the 'Report Error' link at the bottom of the web UI.



A 'Report an error' dialog box will automatically launch once the link is clicked. Click 'Capture Debugging Log' and then go through the steps that originally caused the error. The log will automatically capture the error information.



Once the error has been reproduced, click 'DONE' at the bottom of the screen in the flashing Capturing Debug Log dialog box.



A Submit Error Report dialog box will be displayed. Fill out the form and click 'Report Error' to send the information and open a case with SmartBear support.

Submit Error Report

Name:

Email: (required)

Existing Case Number: (leave blank for new error report)

Describe the problem:

Steps to reproduce:

Note: Log files may accumulate in the temp directory if users enable debugging and do not disable it. These logs are capped at 50MB but if many users leave debugging on, the number of files can impact performance. These files can be deleted if they are not needed and administrators could set up a system task to clean that temp folder of anything older than 2 weeks (for example).

5 Desktop Clients

This chapter describes various desktop client applications and plugins, that simplify and expedite your daily work with Collaborator.

In order to use any of Collaborator clients, your administrator must first [install and configure](#) the server part of Collaborator.

Old clients (versions 11.x and earlier) are incompatible with Collaborator server 12.0 and later. To work with it, you will need to upgrade your clients to version 12.0 or later.

In This Section

- [Desktop Clients - Overview](#)
Provides general information about Collaborator's desktop clients.

- [Client Installation](#)^[425]
Contains information on your Collaborator's user account settings, logging in and logging out operations and subscribing to notifications.
- [Configuration](#)^[432]
Describes how to configure client's connection to Collaborator server and to version control system.
- [GUI Client](#)^[435]
Describes a cross-platform GUI client.
- [Command-Line Client](#)^[445]
Describes a cross-platform command-line client.
- [IDE Clients](#)^[463]
Describes plugins for Eclipse and Visual Studio that allow creating reviews directly from these IDE's
- [Tray Notifier](#)^[533]
Describes a helper tray notifier client.
- [External Diff Viewer Launcher](#)^[535]
Describes a helper tool that allows to launch an external difference viewer for Collaborator reviews.

Related Topics of Interest

- [Collaborator Server](#)^[56]
Describes the server component of Collaborator.
- [Web Client](#)^[286]
Describes the web user interface of Collaborator.

5.1 Desktop Clients - Overview

Collaborator has a variety of clients for creating reviews and uploading files for review. While the Collaborator web server user interface provides the capability for uploading documents and, for some SCM integrations, the capability for creating reviews from committed changes, a client simplifies and expedites this process. Also, importantly, a client allows reviews to be created from local modifications to SCM files that are not accessible on the SCM server (that is, Collaborator clients allow for pre-commit reviews).

Client/Server Version Compatibility

 Old clients (versions 11.x and earlier) are incompatible with Collaborator server 12.0 and later. To work with it, you will need to upgrade your clients to version 12.0 or later.

SCM Integration

All Collaborator clients integrate with SCM systems, for identifying files under source control and ease of selecting modified files to be uploaded to the Collaborator server for a review. Files are uploaded as changelists. For SCM systems that do not implicitly support changelists, the clients have mechanisms for selecting a group of files to be uploaded to a review.

The SCM integration understands adds, changes and deletes but does not currently track or detect file renames or moves.

Creating Reviews and Uploading Files For Review

Each client also provides a means for creating a review, and for attaching a changelist to an existing review.

Other Features

Additional features are available depending on the client. The client right for your development environment may be determined by your SCM system, or just a matter of personal choice.

5.2 Client Installation

The Client Installer includes the following components:

- [GUI Client](#) ^[436]
- [Command-Line Client](#) ^[445]
- [Tray Notifier](#) ^[533]
- [External Diff Viewer Launcher](#) ^[535]
- [Perforce P4V/P4Win plug-ins](#) ^[699]
- Version Control System triggers

The client installer is cross-platform and can be run in an interactive GUI mode or silently from the command-line.

Getting the Installer

Go to our website to get the latest installer for your platform:

<https://support.smartbear.com/downloads/collaborator/>

Installers are provided for Windows, Linux/Solaris and Mac OS X. We also supply the raw files without a managing installer in the form of a compressed tar archive.

Requirements:

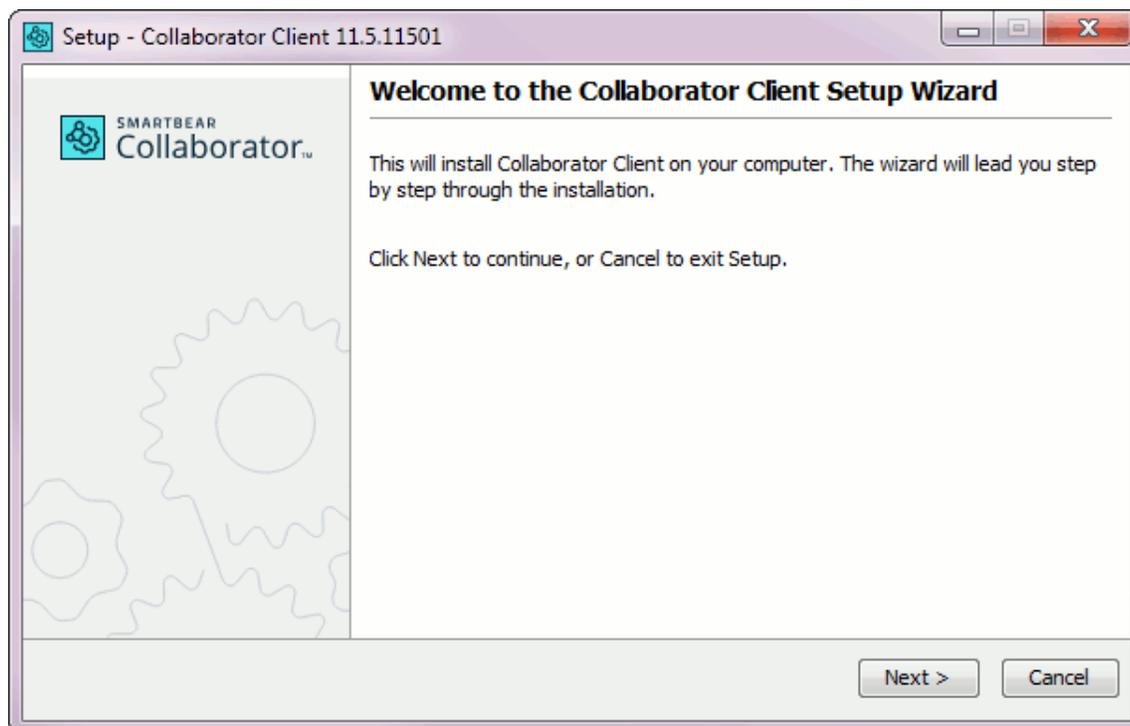
- Java 8, 9, or 11. (OpenJDK is recommended, Oracle JRE/JDK might work as well.) See [Java Compatibility Matrix](#)^[1102] for more details.

Notes:

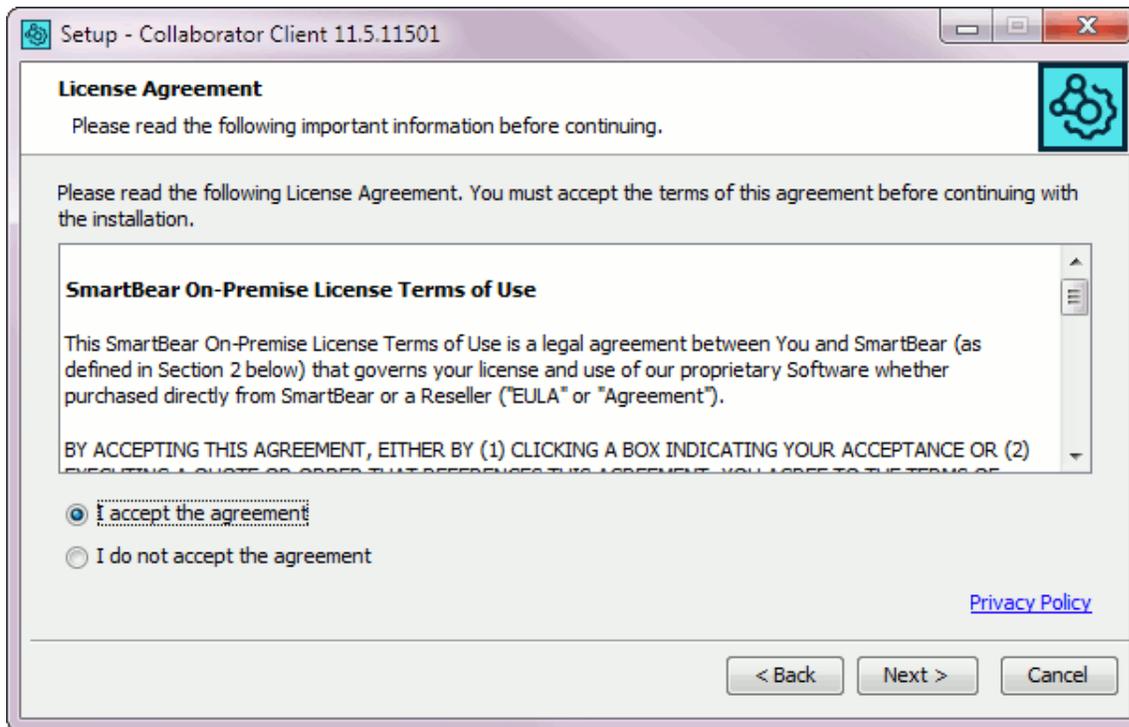
- If you have previously installed the client with the 32 bit installer and are now wanting to run the 64 bit installer, you must first uninstall the 32 bit client. This will not remove any existing configuration data, like preferences, SCM configurations, default browsers and so on.
- In order to enable integration with ClearCase Remote Client, you should launch client installer with administrator permissions on Windows. Otherwise, you can launch the installer as a regular user.

Graphical Installation

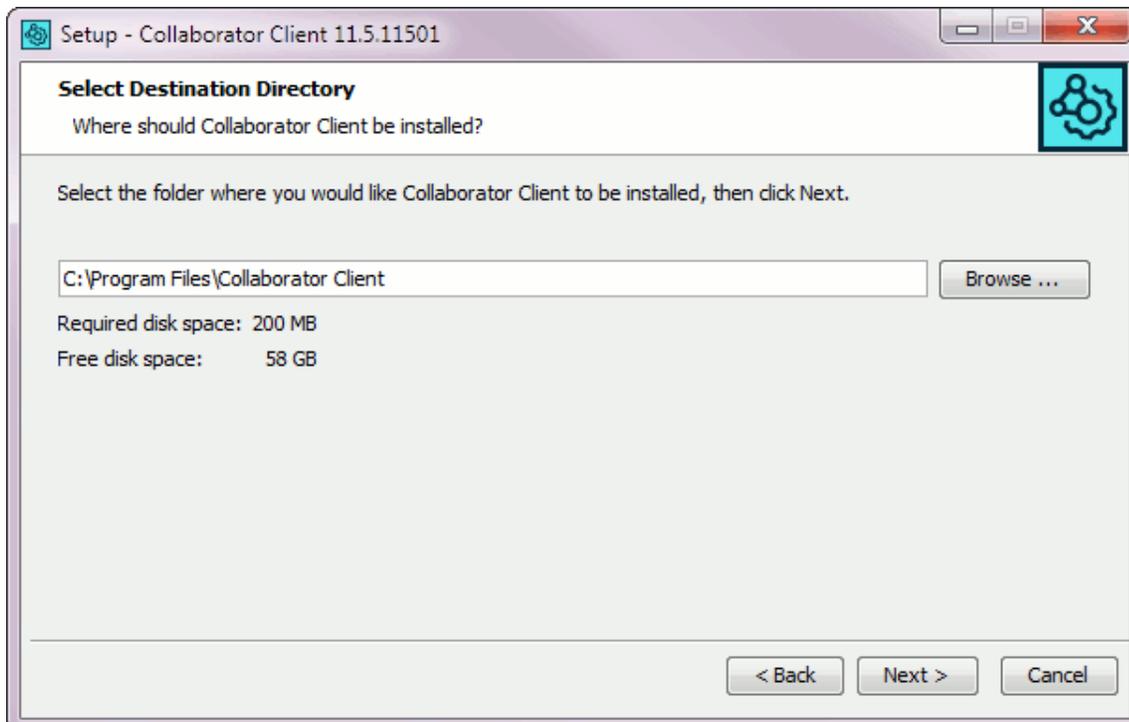
This is the recommended way to install the client software because you get a chance to see all the configuration options and allow the installer to validate your configuration.



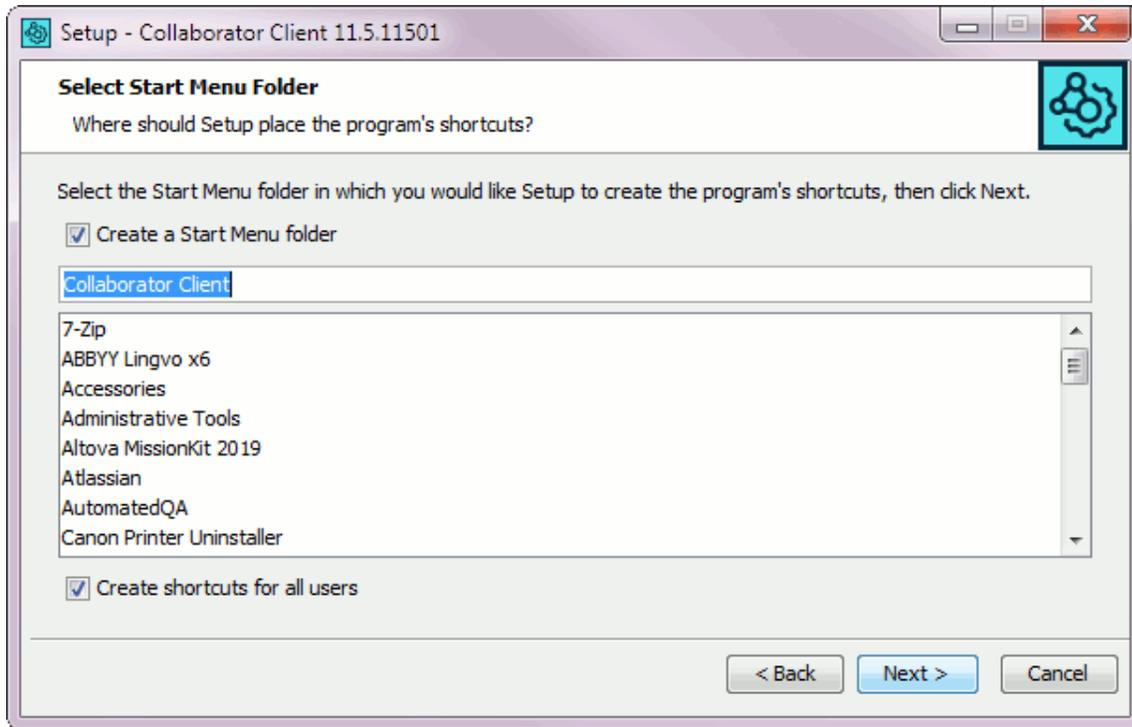
After the welcome screen, you are prompted with the EULA (End User License Agreement):



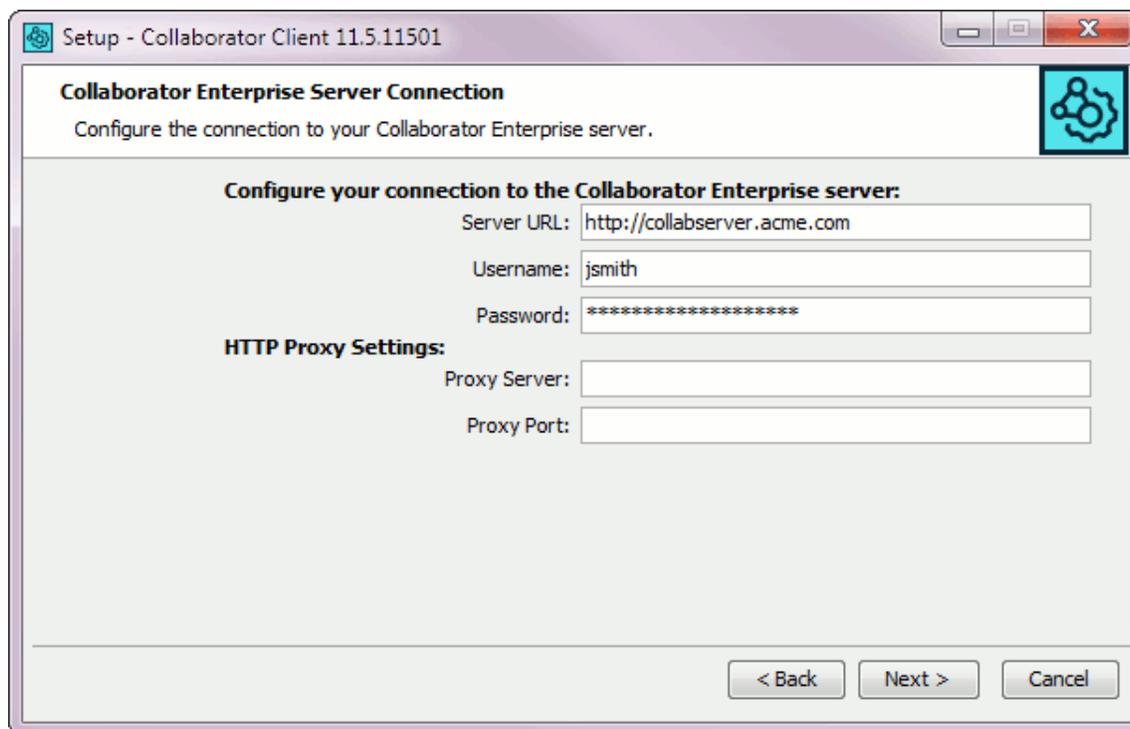
The next screen lets you select where to lay down the files for the installation:



The next screen lets you configure how and if your Start Menu (Windows only) is modified. This does not affect the behavior of the command-line client itself:



Next, you configure your connection to the Collaborator server:

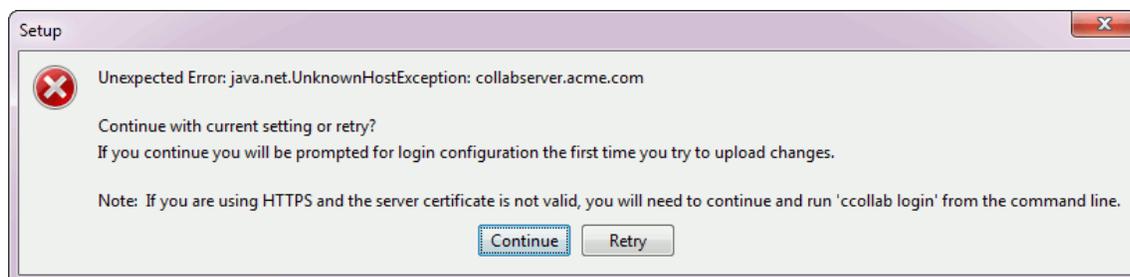


When you configure the URL, be sure to remember to specify the protocol (for example, `http://` or `https://`) and port number, and path. Leaving out one of those things is the most common mistake.

Your username and password must already exist^[206] on the server. Log into^[289] the server first from a web browser to test your account information.

If you use a proxy, supply your proxy information as well.

If the connection to the server cannot be established, you will get an error dialog and an explanation of the problem:



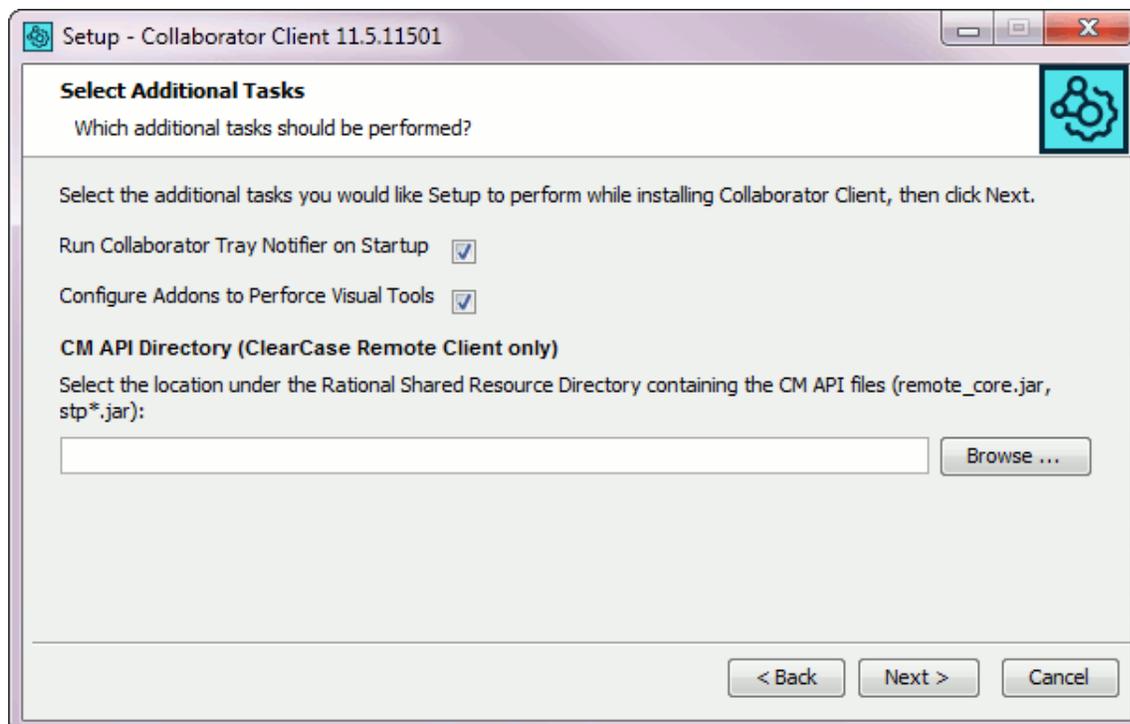
If you select "Retry", you can supply different configuration information and try again. Otherwise, if you select "Continue", the installation will continue but you will still need to set up your configuration^[445].

After this step, you will be prompted for additional tasks.

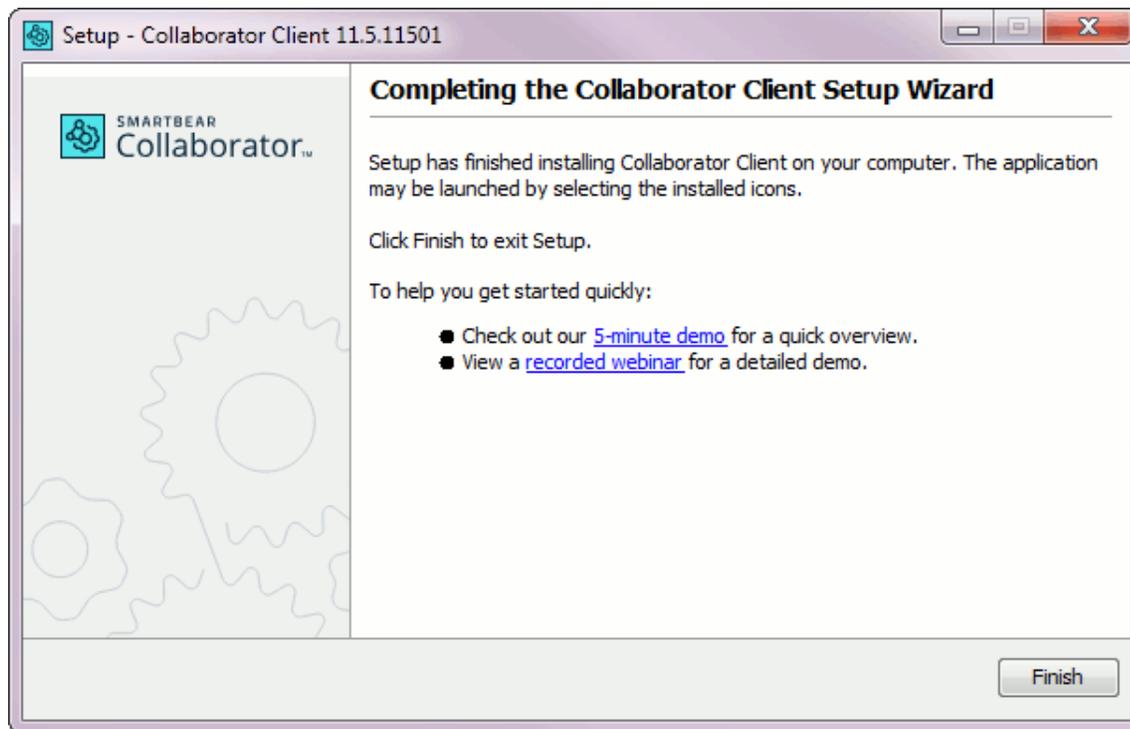
On Windows you will have the option to configure the Collaborator Tray Notifier to run on Startup. On all platforms, there will be options to configure the integrations with ClearCase Remote Client and Perforce Visual Tools.

In order to enable integration with ClearCase Remote Client, you should launch client installer with administrator permissions on Windows. You need to specify the location of the Rational CM API jar files on your system. See details in [Support for ClearCase Remote Client](#)^[584].

The "Configure Addons To Perforce Visual Tools" option is shown only if Perforce Visual Tools is installed. If this option is selected, the installer will attempt to configure the [P4V and P4Win integrations](#)^[699] for the current user. Other users will still need to configure the integrations manually.



Once you click "Next," the installer will complete:



Unattended Installation

To run the installer without a GUI, run it from the command-line using the `-q` switch. In this case, you can also use the `-dir [directory]` switch to specify the target install directory. The `-q` switch gives you a silent install and will not prompt you for any installation instructions. If you would like to be prompted for installation instructions without using the graphical installer, you can run the installer from the console using the `-c` command.

This installation technique can also be used to install clients remotely on many workstations.

Warning: When run in unattended mode, the installer cannot verify the client's connection with the Collaborator server. You might have to manually configure the connection with the server.

Installing on a system with multiple JRE installations

See [Known Issues with the Collaborator](#) ⁸⁷³ for instructions on selecting a specific JRE to be used by Collaborator.

5.3 Configuration

Clients will need to be configured to both the Collaborator server and the SCM server.

Your client may have been successfully configured to the Collaborator server by the installer during the [installation](#)^[425] process. If it has not been properly configured, please visit the [Server Connection Configuration section](#)^[432] for detailed instructions.

Please make sure that your client is also configured to your version control or SCM. For instructions on how to do so, please visit the configuration sections under the appropriate client:

- [GUI Client SCM Configuration](#)^[437]
- [Command-Line Client SCM Configuration](#)^[445]

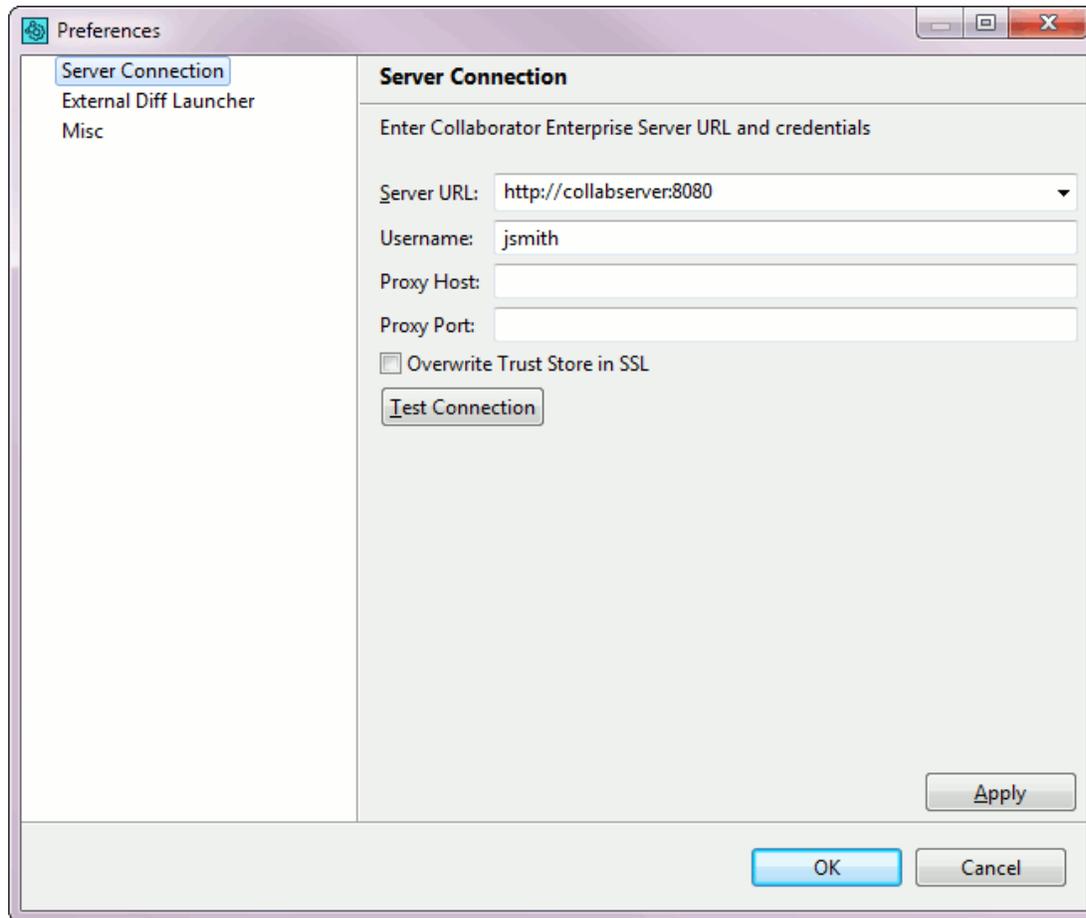
5.3.1 Server Connection Configuration

If you used the [graphical installer](#)^[426], your connection to the Collaborator Server should be configured already. Otherwise, you will be prompted when you try to connect.

The GUI Client, Command-Line Client, Tray Notifier, and SCM Triggers share a common server connection [configuration file](#)^[434]. The server connection configuration can be set with a [graphical interface](#)^[432] using GUI Client or the Tray Notifier, or on the [command-line](#)^[433] using the Command-Line Client.

Graphical Server Connection Preferences

Selecting *File -> Preferences* on the [GUI Client main screen](#)^[435] or selecting *Preferences* in the [Tray Notifier context menu](#)^[534] open the graphical Server Connection preferences page.



The *Server URL* must include the correct port number and path if applicable. The user name and password are the same as you use when [logging into the web server](#) ^[289] (the password is requested when you log in for the first time). The proxy settings should be used if you have a client proxy between your workstation and the server.

Please note that if you are connecting to a server using https and the server uses a self-signed certificate, you *must* run "ccollab login" using the command line client first to import the certificate information to your keystore. Also, you may specify whether client should override the `java.net.ssl.truststore` VM option with hard coded default values (`$JAVA_HOME\lib\security\cacerts`). The latter option requires restarting the client in order to apply.

Use the *Test Connection* button to make sure the connection is working. If it fails, the error message will be helpful.

Command-line Server Connection Global Options

The Command-Line Client uses the following [global options](#) ^[456] to specify the connection to the Collaborator Server:

- `--url` ^[456] - The server's fully-qualified URL.

- `--user` - The user name for the login (same as `web user login`). The password is requested and stored the first time you log in.
- `--server-proxy-host` - The proxy's URL (specify if you connect to the Internet via proxy).
- `--server-proxy-port` - The port number to use on the proxy server (if connect via proxy).
- `--overwrite-trust-store-in-ssl` - Overrides the `java.net.ssl.truststore` VM option with hard coded default values (`$JAVA_HOME\lib\security\cacerts`). Restart client to apply this option.

Use the `ccollab login` command to connect to the Collaborator Server and save your server connection options to the configuration file.

You can try [testing your configuration](#) to verify the configuration is working.

Configuration Files

Collaborator uses several configuration files to store configuration. When a user sets server connection configuration using the [graphical interface](#) or the [command-line](#), the settings are stored inside a directory called `.smartbear` inside the user's home directory. (Under Windows, the "home directory" is your "Documents and Settings" Profile directory.)

The `.smartbear` directory and the configuration files therein can be placed in other locations to establish default behavior. Each of the locations is loaded in a particular order of precedence, with each successive location overriding the settings (if any) in the previous locations:

1. Custom location specified via the `--pref-dir` global option

If the `--pref-dir` command-line option is specified, Collaborator will use the configuration files from the specified location.

2. `INSTALLDIR/.smartbear`

Here `INSTALLDIR` refers to the Collaborator installation directory. This is typically `/opt/ccollab-cmdline` under Unix or `C:\Program Files\Collaborator Client` under Windows.

This is most useful for system-wide default settings.

3. `PROFILEDIR/.smartbear`

Here `PROFILEDIR` refers to a directory specified using the Java property `smartbear.profile` on one of the Collaborator Client executables. With this property defined, the client will look in this directory for more configuration.

This is most useful for executable-specific default settings, such as settings just for SCM server-side triggers.

4.USERDIR/.smartbear

Here USERDIR refers to the user's home directory (under Windows, your " Documents and Settings" Profile directory).

This is the default location for configuration settings to be stored, and is useful for user-specific settings.

5.4 GUI Client

The GUI Client is a cross-platform client interface to the Collaborator server. It is used for uploading files, either before or after check-in.

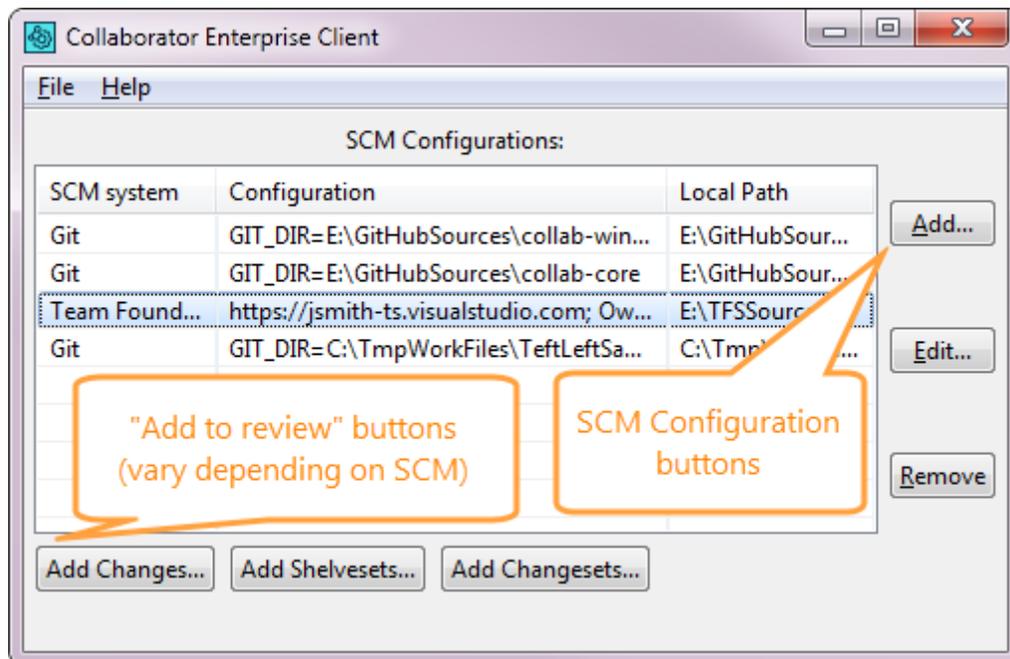
This chapter includes:

- [Main Screen](#)^[435]
- [SCM Configuration](#)^[437]
- [Preferences](#)^[439]
- [Troubleshooting](#)^[443]

5.4.1 Main Screen

Main Screen

The GUI Client's main screen contains a list of SCM configurations. Each SCM Configuration entry shows its SCM system, Configuration and Local Path (if any). Use the [SCM Configuration buttons](#)^[436] on the right side of the screen to add or modify an SCM Configuration. Use the [Add to Review buttons](#)^[436] on the bottom of the screen to upload review materials to the Collaborator Server.



GUI Client Main Screen

Server Connection configuration

If you used the [graphical installer](#)⁴²⁶, your connection to the Collaborator Server should be configured already. Otherwise, you will be prompted when you try to connect. You can also select *File -> Preferences* in the system menu to open the [Server Connection preferences](#)⁴³² page.

SCM Configuration buttons

The buttons on the right side of the main screen are used to add or modify an SCM Configuration in the SCM Configurations list.

- *Add...* adds a new SCM Configuration
- *Edit...* edits the selected SCM Configuration
- *Remove* removes the selected SCM Configuration

Add to Review buttons

The buttons on the bottom of the main screen are used to upload materials to a new or existing Review on the Collaborator Server. The buttons available will depend upon the selected SCM Configuration. Different buttons are available for different SCM systems:

- [AccuRev](#)⁵⁴⁴

- [CVS](#)^[555]
- [Git](#)^[567]
- [IBM Rational ClearCase](#)^[588]
- [IBM Rational Synergy](#)^[607]
- [Mercurial](#)^[646]
- [Microsoft Team Foundation Server](#)^[657]
- [PTC Integrity](#)^[669]
- [Perforce](#)^[686]
- [Subversion](#)^[716]

Keyboard Shortcuts

The GUI Client also offers keyboard shortcuts as follows:

File Menu

Alt + F = File menu

Alt + P = Preferences

Alt + X = Exit

Help Menu

Alt + H = Help menu

Alt + L = Capture Debugging Log

Alt + E = Email Support...

Alt + A = About Collaborator

* For Mac users, 'Alt' should be replaced with 'Cmd.'

Known Issues

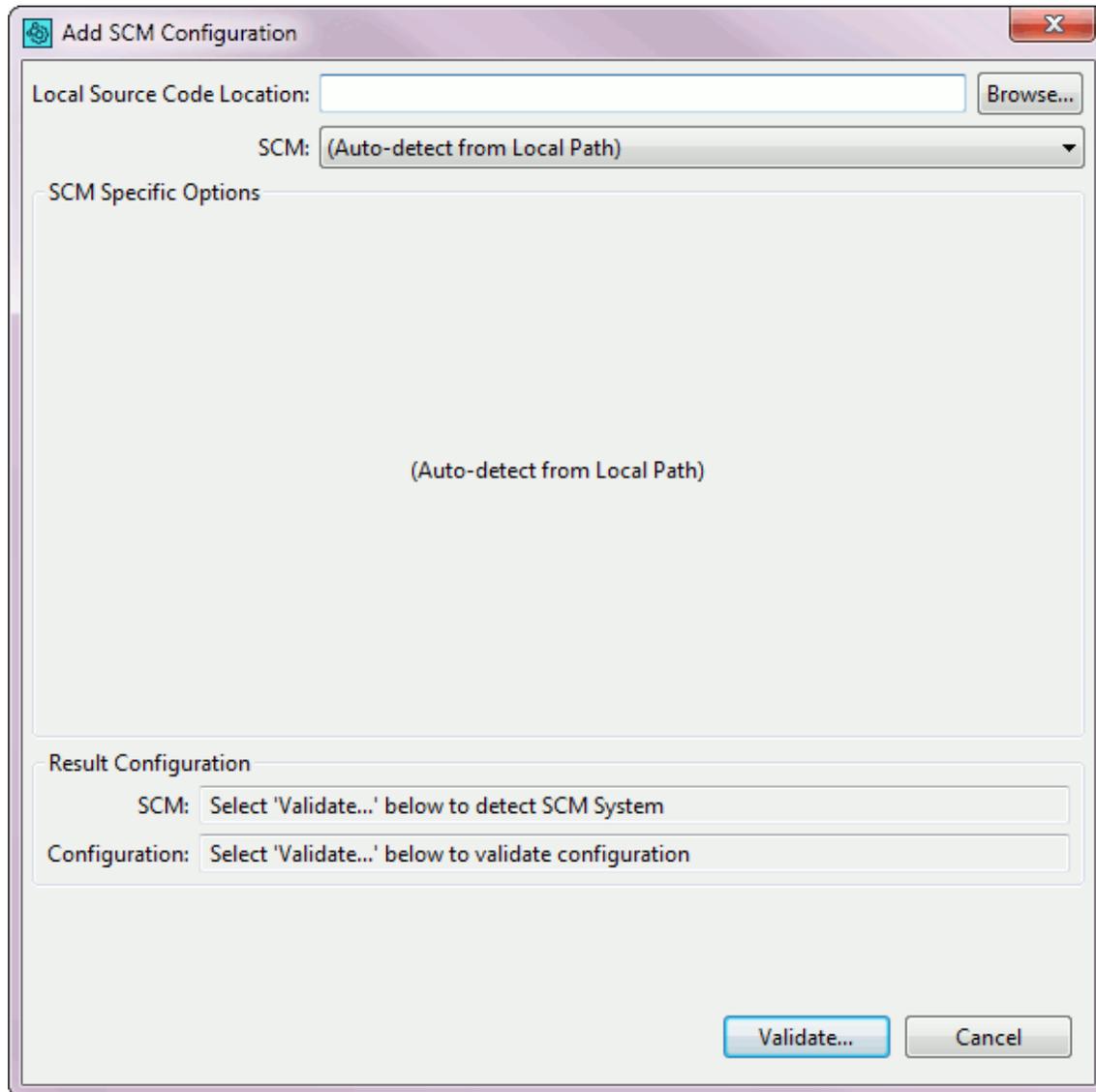
Because of [technical issue](#) with GTK3, GUI Client on Unix/Linux operating systems may fail to display table data on Add Changelists, Add Commits, Add Transactions and similar pages.

5.4.2 SCM Configuration

This section will describe how to configure the GUI Client to your SCM or version control. You will also have to [configure](#)^[432] the client to the Collaborator server.

Configuring Version Control

Pressing the *Add...* or *Edit...* [SCM Configuration buttons](#) ⁴³⁶ on the right side of the [main screen](#) ⁴³⁵ opens the SCM Configuration dialog.



SCM Configuration dialog

Local Path

If you have a copy of your source on your local machine, enter its location into the optional *Local Path* field using the *Browse* button. Press the *Validate...* button to detect your SCM and SCM Configuration.

Scm Specific Options

If there are additional settings necessary to connect to your SCM system, select your SCM system using the *SCM* drop-down to show the available options. The Collaborator integration requires that a command-line client be installed. There are different options available for each SCM system:

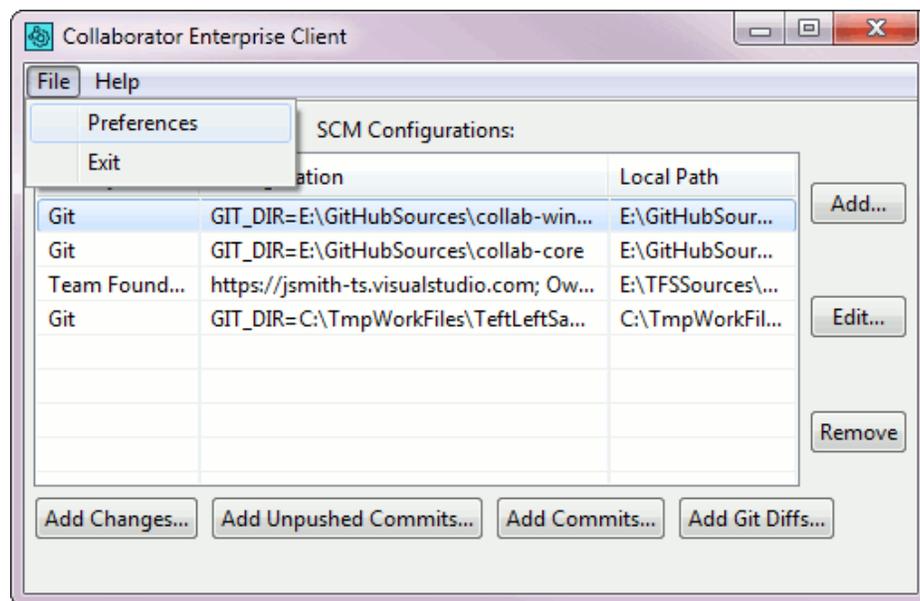
- [AccuRev](#)^[543]
- [CVS](#)^[555]
- [Git](#)^[566]
- [IBM Rational ClearCase](#)^[587]
- [IBM Rational Synergy](#)^[606]
- [Mercurial](#)^[646]
- [Microsoft Team Foundation Server](#)^[655]
- [PTC Integrity](#)^[668]
- [Perforce](#)^[683]
- [Subversion](#)^[715]

5.4.3 Preferences

The Preferences menu will allow you to change the settings for:

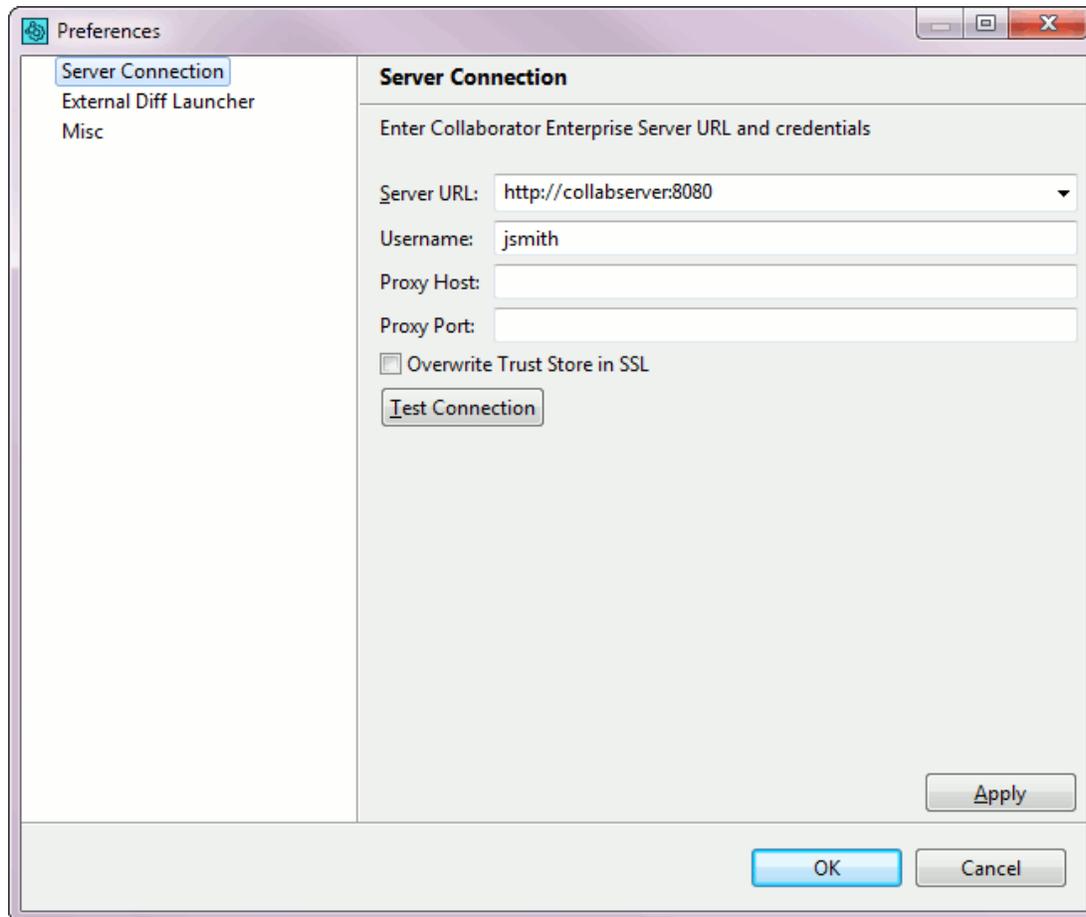
- Server Connection
- External Diff Viewer Launcher
- Miscellaneous

To view preferences, click on *File -> Preferences* in the [main screen](#)^[533] of the GUI Client:



You can also view the Preferences menu via the [Context Menu](#)⁵³⁴ of the Tray Notifier.

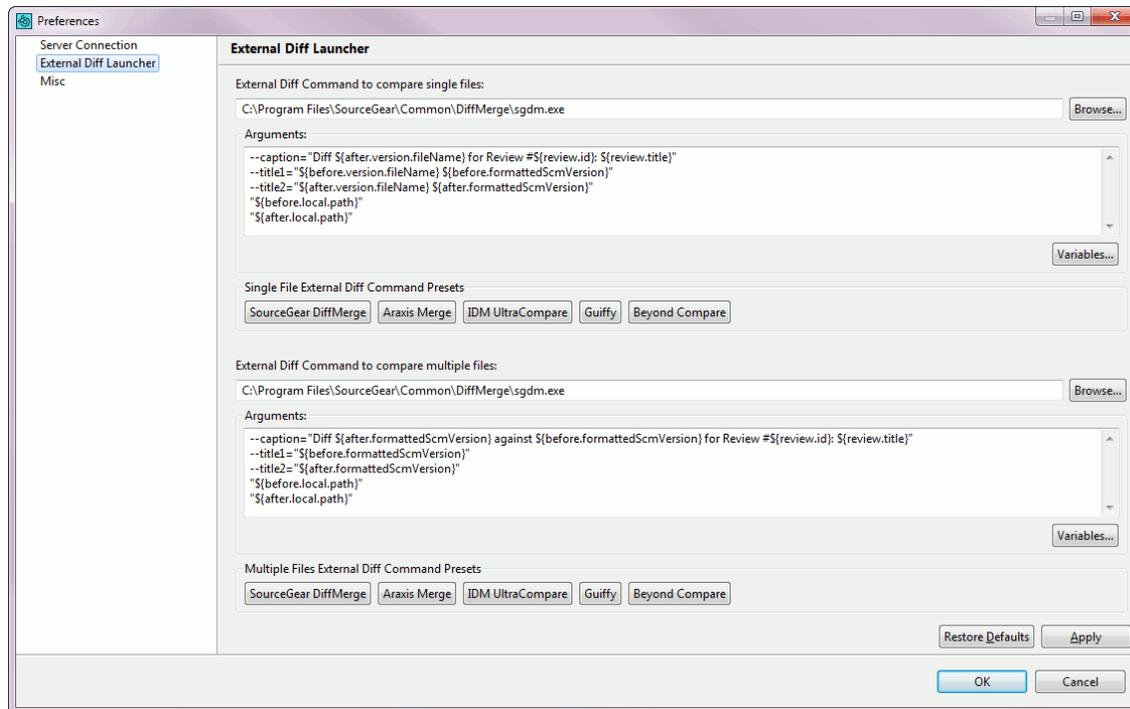
Server Connection



Here you can configure the client connection to the server. See [Server Connection Configuration](#)

432

External Diff Viewer Launcher



Here you can configure settings for the [External Diff Viewer Launcher](#)⁵³⁶. This is a helper utility that allows comparing review materials in any third-party diff viewer instead of Web Client's diff viewer.

There are two separate **External Diff Command** settings, one for comparing two versions of a **single file**, and one for comparing **multiple files** (two directory trees).

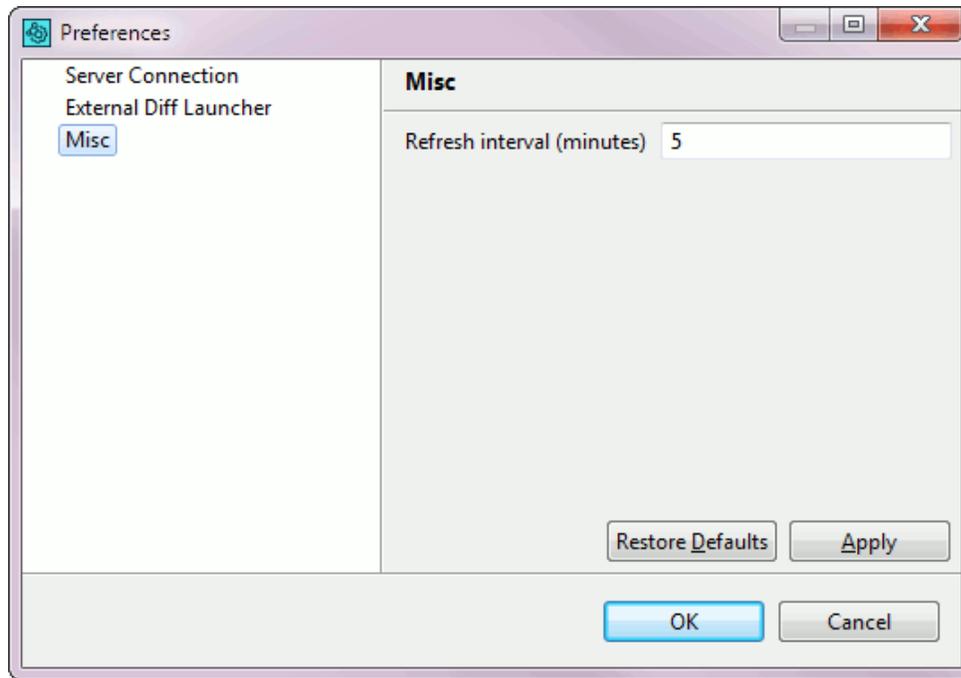
The **External Diff Command** field contains the absolute path to the executable the External Diff Viewer Launcher will launch.

The **Arguments** field contains arguments passed to the executable. Certain variables specified in the **Argument** field are substituted when the external diff command is invoked. Click the **Variables** button to view the list of available variables and their descriptions.

External Diff Viewer Launcher can work with almost any third-party diff viewer, and has presets for 5 most popular diff viewers: SourceGear DiffMerge, Araxis Merge, IDM UltraCompare, Guiffy, and Beyond Compare.

To use one of the presets, just click the appropriate button (for example, Guiffy) under **External Diff Command Presets**.

Miscellaneous



In the Miscellaneous tab, you can change the refresh interval - that is how often to check Collaborator server for updates.

5.4.4 Troubleshooting

Anti-Virus Software

If you have any [anti-virus software](#)^[875] running, first determine whether it is interfering with the Collaborator client.

Known Issues

Check the [Known Issues Appendix](#)^[872] to see whether SmartBear already knows about this issue.

Linux packages

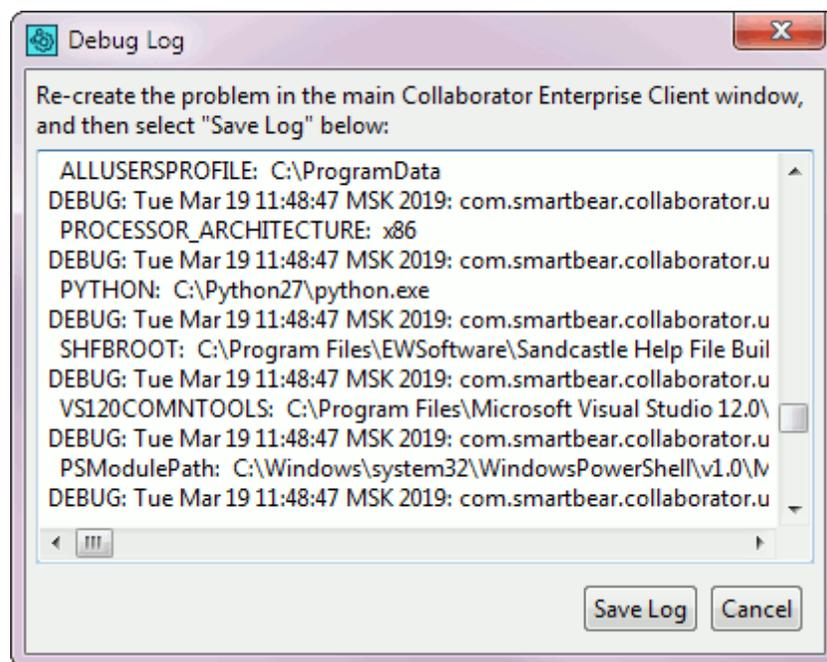
On RedHat Enterprise Linux or Fedora Core, you may need to install the following package names to use our GUI client. If the GUI client will not start successfully, please be sure that these packages are installed.

```
glib2
glibc
```

```
gtk2
libX11
libXau
libxcb
libXext
libXi
libXtst
```

Capturing a debugging log

If you are experiencing problems with the GUI Client, especially if the problem is related to your SCM system, it will help SmartBear technical support if you send in a debugging log. To capture a debugging log, select *Help -> Capture Debugging Log* from the system menu on the Main Screen ⁴³⁶.



Debug Log

After the Debug Log window has opened, go back to the Main Screen ⁴³⁶ window and recreate your problem. You should see log messages being created in the Debug Log window. After you have recreated the problem, go back to the Debug Log window and select the Save Log button. This will prompt you for a convenient place on your machine to save the log file.

Please send the log file along with a full description of what you were trying to do when the error occurred to support@smartbear.com.

5.5 Command-Line Client

The Command-Line Client is a cross-platform client interface to the Collaborator server. It can be used by a human for uploading files, integrating with version control, and querying the server, or as a part of an automated script in a sophisticated ALM / build system.

This chapter includes:

- [Configuration](#)^[445]
- [Commands](#)^[447]
- [Graphical Editor](#)^[448]
- [Uploading Diffs](#)^[449]
- [Troubleshooting](#)^[453]
- [Global Options Reference](#)^[455]
- [Command-line Reference](#)^[462]

5.5.1 Configuration

The Command-Line Client needs to be able to connect with your Collaborator Server, connect with your SCM system, and may need to launch a graphical editor for selecting files to be uploaded to reviews. The following sections describe [configuring](#)^[432] the Command-Line Client for these actions.

Global Options

The Command-Line Client supports many [global options](#)^[456] and sub-command options. Global options may be specified on the command-line before the sub-command for each invocation, or they can be saved and applied to all future invocations using the `set` sub-command.

Default settings for global options can also be set using one or more [configuration files](#)^[447].

Configuring Collaborator Server Connection

If you used the [graphical installer](#)^[426], your connection to the Collaborator Server should be configured already. Otherwise, you will be prompted when you try to connect. Try [testing your configuration](#)^[446] to verify the configuration is detected correctly. You can also [manually configure your connection](#)^[433] using the `login` sub-command.

Configuring Version Control

In most cases, the Command-Line Client can automatically detect your SCM system configuration. Try [testing your configuration](#)^[446] to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your SCM system, or if you want to override the detected settings, you can specify SCM configuration settings using [global options](#)^[455]:

- [AccuRev](#)^[549]
- [ClearCase](#)^[597]
- [CVS](#)^[559]
- [GIT](#)^[574]
- [PTC Integrity](#)^[672]
- [Perforce](#)^[691]
- [Subversion](#)^[723]
- [Team Foundation](#)^[663]

Testing Configuration Settings

To test the current configuration settings, go to working copy of your repository (the place on your local machine where files from an SCM system are checked-out) and execute:

```
ccollab info
```

This prints the current effective Collaborator and version control configuration settings. If you have not specified the [scm](#)^[456] global option, the Command-Line Client will attempt to automatically detect your SCM configuration.

You will see some error messages if the configuration is not valid. If all goes well you should see something like this:

```
Connecting to Collaborator server http://myserver:8080
Connected as: John Doe (jdoe)
Auto-detecting SCM System for 'C:\mycode'
Detected Subversion
SCM Username: jdoe
```

```
SCM Config: repo=http://mysvnserver/repos/myrepo
```

Graphical Editor Configuration

The Command-Line Client uses the default system text editor to display files to be uploaded for review. You can override this to point to any other text editor using the `editor` global option.

Some editors on some platforms are launched as detached processes. This will cause the Command-Line Client to continue before the editor is closed, losing any changes made to the file list. The `editor-prompt` global option can be used to pause the Command-Line Client after the editor is launched and wait for user keyboard input before continuing.

Configuration Files

Collaborator uses several `configuration files` to store default global options. When a user saves a `global option` setting (using `ccollab set`), the setting is stored inside a directory called `.smartbear` inside the user's home directory. (Under Windows, the "home directory" is your "Documents and Settings" Profile directory.)

Global options specified by `command-line switches` override settings stored in the configuration files.

5.5.2 Commands

Basic Commands

The Command-Line Client provides a few basic commands which are unrelated to uploading files to the Collaborator Server:

- `help` - Display help on using the Command-Line Client
- `login` - Verify and/or change connection to the Collaborator Server
- `info` - Validates server connection and SCM configuration
- `set` - Save a `global option` setting

Upload Commands

The primary function of the Command-Line Client is to upload review materials (files) to the Collaborator Server.

The recommended commands to use vary by Version Control System:

- [AccuRev Commands](#)^[542]
- [ClearCase Commands](#)^[583]
- [CVS Commands](#)^[553]
- [Git Commands](#)^[563]
- [Mercurial Integration](#)^[645]
- [PTC Integrity Commands](#)^[666]
- [Perforce Commands](#)^[678]
- [Rational Synergy Commands](#)^[605]
- [Subversion Commands](#)^[710]
- [Team Foundation Commands](#)^[653]

In addition to the Version Control specific commands, the Command-Line Client provides a few basic upload commands that work for any (or no) Version Control system:

- `addfiles` - Upload local files without diffs
- `addchanges` - Uploads locally modified files controlled by an SCM
- `adddiffs` - Upload local or arbitrary diffs (see [Uploading Diffs](#)^[449])

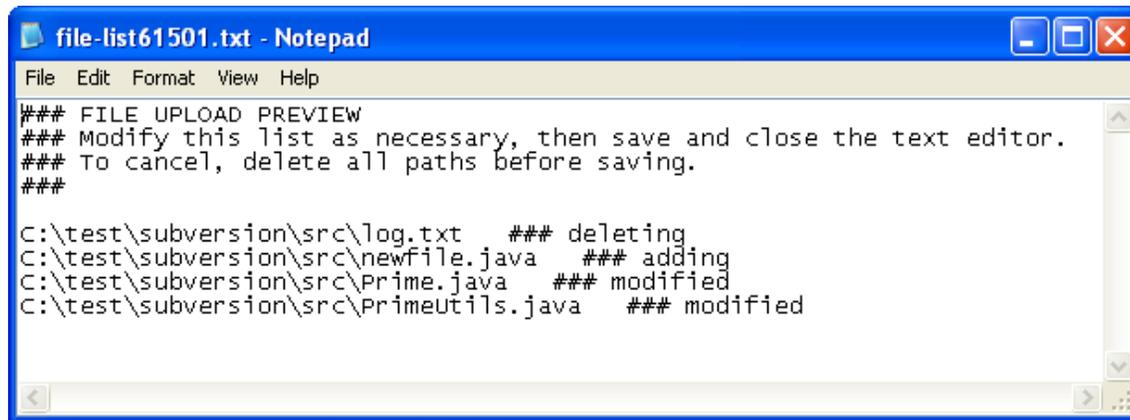
Upload commands that deal with files managed by Version Control systems should be called from any sub-folder within the working copy of your repository (the place on your local machine where files from an SCM system are checked-out). Otherwise, the commands may fail to detect the SCM configuration.

Scripting Commands

The Command-Line Client also includes many commands meant for constructing custom scripts, usually used for integrating with external systems or implementing custom behaviors. For more information see [Scripting](#)^[825].

5.5.3 Graphical Editor

The `addchanges` and `addactivity`^[603] commands can launch a graphical editor with a file list so you can review the files about to be uploaded and make any corrections you wish:



```
file-list61501.txt - Notepad
File Edit Format View Help
### FILE UPLOAD PREVIEW
### Modify this list as necessary, then save and close the text editor.
### To cancel, delete all paths before saving.
###
C:\test\subversion\src\log.txt    ### deleting
C:\test\subversion\src\newfile.java  ### adding
C:\test\subversion\src\Prime.java   ### modified
C:\test\subversion\src\PrimeUtils.java  ### modified
```

The `###` sequence is a comment. If all lines with files are deleted the operation is aborted. In this example there are two modified files, one file being added, and one being deleted.

If not otherwise configured, the command-line uses the default system editor to display the file list. See [Graphical Editor Configuration](#)^[447] for information on specifying a different text editor to be used.

5.5.4 Uploading Diffs

You can upload arbitrary file differences using the `ccollab adddiffs` command. This subject is complex enough to warrant its own section in the manual.

Uploading Local File Diffs

You can upload local file differences with the `adddiffs` command:

```
ccollab adddiffs <review> path-from path-to
```

The `path-from` and `path-to` fields are paths to two files or directories to compare, and `<review>` is an integer review-id, 'new', 'ask', or 'last'. For example, this command would upload any differences found as a change-set as a new review:

```
ccollab adddiffs new /old/directory /new/directory
```

Uploading Arbitrary Diffs

You can also upload arbitrary differences with the `adddiffs` command. Assuming textual diffs have already been generated in a file called `diffs.txt`, use this:

```
ccollab adddiffs review diffs.txt
```

Or you can pipe the results of another diff command right into the `ccollab` process using a single dash instead of a file path. For example, this command uses the GNU `diff` command to generate a unified diff format, then uploads it directly into review #2534:

```
diff -u100 dir1 dir2 | ccollab adddiffs 2534 -
```

After you upload diffs to the server you will see the "changelist" appear similar to this:

Changes from Local Filesystem				
	Changelist	Date/Time	Author	Text
[View] [Delete]	c194f4b0	2007-01-03 14:24	jcohen	Uploaded File Differences
				Generated by Perforce using: p4 diff2 //depot/...@1500 //depot/...@1502

Uploading Differences from Version Control

If you want to upload differences generated by a version control command-line tool, you should use the `ccollab add*diffs` command specific to your version control system (if available) instead of `ccollab adddiffs`.

Version Control specific `add*diffs` commands:

- [addardiffs](#)^[552] ([AccuRev](#)^[542])
- [addcvsdiffs](#)^[561] ([CVS](#)^[553])
- [addgitdiffs](#)^[577] ([Git](#)^[563])
- [addhgdiffs](#)^[651] ([Mercurial](#)^[645])
- [addp4diffs](#)^[693] ([Perforce](#)^[678])
- [addsvndiffs](#)^[726] ([Subversion](#)^[710])

These commands integrate with version control servers and supply exactly the right command-line switches to the underlying version control command-line to minimize server transmissions and maximize features like fully reproducing both previous and current versions of the document.

Many of the pitfalls with diffs described below are avoided when using `ccollab add*diffs`.

Supported Diff Formats

There are many kinds of diff formats out there. Our software supports many of them; if you find a format that is not working, please [let us know](#)^[32] so we can get your diff format into our unit tests.

- **Unified**

The unified format starts with a two-line header naming the previous and name versions of a file, plus optional file information. Then it follows with diff-chunks starting with "@@" and then having both unmodified lines and added/removed lines. An exact definition of the format can be found [here](#).

Any number of these file-diffs can be strung together. Our software parses all of the files and uploads each as a "before" and "after" version. Context lines are preserved; lines skipped are reconstructed ([more about this later](#)^[452]).

- **UltraCompare Text Format**

We support the proprietary text format emitted by the 3rd party commercial command-line tool [UltraCompare](#).

This is a Unicode diff with full file context making it an excellent format that preserves all file content.

Although this utility emits only one file difference at a time, you can concatenate any number of these diffs together and upload them in one shot through the `ccollab` command-line.

This can be especially handy if you are writing a script to automate this process.

- **Subversion Style**

Subversion outputs a two-line header for each file; one starts with "Index:" and names the file in question, the next is a row of equal signs. Following the header is any of three types of diff output; we support all three but you should use the unified format for [best results](#)^[452]. Any number of these file-diffs can be strung together.

Note that with Subversion you should use [addsvndiffs](#)^[726] instead of `adddiffs`.

- **Perforce Style**

Perforce has a variety of output formats; we support all of them. One is just the Unified format specified above. The other uses a one-line file header that shows the "before" and "after" file paths and version numbers with other file data, and then uses any of three types of diff output to encode the diffs. We support all three but you should use the unified format for [best results](#)^[452]. Any number of these file-diffs can be strung together.

Note that with Perforce you should use [addp4diffs](#)^[693] instead of `adddiffs`.

- **CVS Style**

Similar to Subversion Style (see above) but has additional lines of output besides just those two file header markers.

Note that with CVS you should use [addcvsdiffs](#)^[561] instead of `adddiffs`.

- **GNU Format**

The GNU format shows just additions, deletions, and modifications with no file context. An exact definition of the format can be found [here](#).

We do not recommend you use GNU format because (1) it does not support file names or multiple files and (2) it does not support context lines which causes problems when [reconstructing files](#)^[452].

- **RCS Format**

The RCS format shows just additions and deletions with no file context.

We do not recommend you use RCS format because (1) it does not support file names or multiple files and (2) it does not support context lines which causes problems when [reconstructing files](#)^[452].

- **Araxis Merge, BeyondCompare, GuiffyMerge, GNU diff, xdiff, and other tools**

With these diff utilities, use an export option that creates unified diffs with lots of context. See the guidelines [below](#)^[452].

When the command-line utility is uploading diffs it will print out the format that was detected. If it complains that the format is unknown, attach a copy of your diff data to an email to our [tech support department](#)^[32] so we can add support for your format.

Context Lines and Reconstructing Files

Most diff formats skip over lines that were unchanged, possibly leaving a few lines of "context" around each modification. This might be OK for "patch" utilities but it is not good when you want to do a review. Why not?

When you do the review, if you do not have many lines of context you cannot see much beyond the diffs themselves. Our software is smart enough to reconstruct the two files as well as possible, retaining all line numbers, but of course there will be gaps.

Here is how the [side-by-side view](#)^[353] looks with some differences that only had three lines of context:

```

69 *** unspecified line placeholder ***
70 *** unspecified line placeholder ***
71 *** unspecified line placeholder ***
72     }
73 }
74
75 function preloadImage (object, url) {
76     eval (object + " = new Image ()");
77     eval (object + ".src = '" + url + "'");
78 }
79
80 preloadImage ("updatingimage", "../images/AIMSAnim.gif");
81
82 /*****\
83 |*** Show Updating window ***|
84 called from DCImageButton
85 *** unspecified line placeholder ***
86 *** unspecified line placeholder ***
87 *** unspecified line placeholder ***

```

You can see the "*** unspecified line placeholder ***" text where the diff skipped over lines.

How to prevent this? It depends on how you are generating diffs. Here are some guidelines:

- Always use Unified diff [format](#)^[451], not RCS or GNU. Those others do not support lines of context *at all*, nor do they support filenames so your uploads will be "anonymous".
- Always include a lot of context with your Unified diff format. The way to specify this varies depending on your diff utility. For example, using GNU `diff` the command-line option is `-u1000` where "1000" is the number of lines of context. Selecting a big number like 1000 is not unreasonable! Reviewers will thank you for it.
- Use the version-control specific `ccollab add*diffs`^[450] commands whenever you can. This automatically selects the right command-line switches to maximize context while minimizing data transmissions.

5.5.5 Troubleshooting

Check here for common problems and their solutions.

Anti-Virus Software

If you have any [anti-virus software](#)^[875] running, first determine whether it is interfering with the Collaborator client.

Known Issues

Check the [Known Issues Appendix](#)^[872] to see whether SmartBear already knows about this issue.

Version History

Check the [Version History](#) on the SmartBear website to see if this issue has been resolved in a later release.

I try to run `ccollab` but it says File Not Found.

Under Windows, sometimes the installer is not able to update the `PATH` variable due to system configuration or permissions. Or the `PATH` variable is updated but the system requires a log-out or log-in before it is in the `PATH`.

Under Unix systems, the `PATH` variable needs to be updated if you did not install in a standard location such as `/bin` or `/usr/bin`.

I try to upload files managed by an SCM system but `ccollab` fails to detect a valid SCM configuration

You should call the upload commands from any sub-folder within the working copy of your repository (the place on your local machine where files from an SCM system are checked-out).

Running with debug logging enabled

Running the command-line client with the `--debug`^[455] option will create a log file at the following location: `~/ .smartbear/log/ccollab.log` on Unix platforms and `%USERPROFILE%/ .smartbear/log/ccollab.log` on Windows platforms. If you contact technical support with a problem and they cannot reproduce it, they will typically ask you to do this and send them that debug log.

5.5.6 Global Options Reference

Description

The following topic lists the available command-line global options.

Global Options can be specified on the command-line, or they can be saved and applied to every command using the `ccollab set` command. Global options specified explicitly for a particular command-line call override the values saved by the `ccollab set` command.

General Options

Option	Description
<code>--debug</code>	Run in debug mode, create a log file at the following location: <code>~/ .smartbear/log/ccollab.log</code> on Unix platforms and <code>%USERPROFILE%/ .smartbear/log/ccollab.log</code> on Windows platforms.
<code>--editor <value></code>	External editor to use for editing file list
<code>--editor-prompt</code>	Prompt user for input to signal editing of file list complete
<code>--no-browser</code>	Do not pop up a web browser when the command completes
<code>--non-interactive</code>	Do not interact with user
<code>--overwrite-trust-store-in-ssl</code>	Overrides the <code>java.net.ssl.truststore</code> VM option with hard coded default values (<code>\$JAVA_HOME/lib/security/cacerts</code>). Restart client to apply this option.
<code>--password <value></code>	Password to use when connecting to the Collaborator server
<code>--pref-dir <value></code>	Overrides the location of Collaborator configuration files ⁴³⁴ . The path to preference folder must be specified either as relative path (a subfolder of the SmartBear profile folder), or as absolute path. The folder should allow read/write access to files.
<code>--quiet</code>	Do not display progress messages

Option	Description
--scm <value>	Manually sets the SCM system type, for example, "perforce" or "none" for no SCM System. Clearing this option causes the SCM system to be auto-detected
--server-proxy-host <value>	Proxy server URL to use to connect to the Collaborator server
--server-proxy-port <value>	Proxy server port number to use to connect to the Collaborator server
--url <value>	URL to use when connecting to the Collaborator server
--user <value>	Username to use when connecting to the Collaborator server

AccuRev-specific Options

Option	Description
--accurev-depot <value>	AccuRev depot name
--accurev-exe <value>	Full path to the `accurev` command-line client
--accurev-anc-algorithm <value>	Which algorithm to use when calculating the predecessor, either predecessor, previous-occupant, or basis-version

ClearCase-specific Options

Option	Description
--ccrc-server-url <value>	CCRC server URL (for ClearCase Remote Client integration only)

Option	Description
<code>--ccrc-user <value></code>	CCRC username (for ClearCase Remote Client integration only)
<code>--ccrc-passwd <value></code>	CCRC password (for ClearCase Remote Client integration only)
<code>--clearcase-exe <value></code>	Full path to the `cleartool` command-line client
<code>--clearcase-update-snapshot</code>	Whether to update ClearCase snapshot views prior to uploading files for review

CVS-specific Options

Option	Description
<code>--cvs-exe <value></code>	Full path to the `cvs` command-line client
<code>--cvsroot <value></code>	Connection to the CVS repository

Git-specific Options

Option	Description
<code>--git-exe <value></code>	Full path to the 'git' command line client
<code>--git-skip-index</code>	Defines whether the changes you upload via the <code>ccollab addchanges</code> command should be taken from the working tree (including not-yet-committed changes) instead of from the index. This is an analogue of the <code>git commit -a</code> command.

Mercurial-specific Options

Option	Description
<code>--mercurial-exe <value></code>	Full path to the 'mercurial (hg)' command line client

Perforce-specific Options

Option	Description
<code>--p4 <value></code>	Full path to the P4 executable
<code>--p4port <value></code>	How to connect to the Perforce server
<code>--p4user <value></code>	Perforce user name
<code>--p4passwd <value></code>	Perforce password or ticket
<code>--p4client <value></code>	Mapping of Perforce server data to the local machine
<code>--p4-ignore-integration-history <value></code>	Ignore integration history when calculating predecessor
<code>--p4charset <value></code>	Perforce character set used for translation of Unicode files
<code>--p4-require-empty-default-changelist</code>	If true, do not allow uploads if the default changelist contains files
<code>--p4-specify-command-charset <value></code>	Should a character set be specified for communication with Perforce

PTC Integrity-Specific Options

Option	Description
<code>--mks-host <value></code>	PTC Integrity server name.
<code>--mks-port <value></code>	PTC Integrity server port.
<code>--mks-user <value></code>	PTC Integrity user name.
<code>--mks-passwd <value></code>	PTC Integrity user password.
<code>--mks-expand-keywords</code>	Specifies whether to expand keywords in source files.

The arguments use the `--mks` prefix as MKS Integrity is a former name of PTC Integrity.

Rational Synergy-specific Options

Option	Description
<code>--ccm-exe <value></code>	Full path to the `ccm` command-line executable
<code>--ccm-user <value></code>	User Name to use when starting a Rational Synergy session
<code>--ccm-passwd <value></code>	Password to use when starting a Rational Synergy session
<code>--ccm-engine-host <value></code>	Host the Rational Synergy Engine will run on
<code>--ccm-database-path <value></code>	Path of the Rational Synergy database to connect with

Option	Description
<code>--ccm-local-database-path <value></code>	Path of the local Rational Synergy database, typically <code>c:/temp/ccm</code> or <code>/tmp/ccm</code>
<code>--ccm-remote-client</code>	Start Rational Synergy sessions as a Remote Client
<code>--ccm-server-url <value></code>	Server URL for Web-Mode Rational Synergy servers

Rational Team Concert-specific Options

In order to use Rational Team Concert integration from command-line client, you need to configure both Collaborator server and clients and RTC server. See [configuration instructions](#)⁶²⁷.

Option	Description
<code>--rtc-repository-uri <value></code>	The URI of the repository to work with.
<code>--rtc-username <value></code>	The user name to use for the chosen RTC repository.
<code>--rtc-password <value></code>	The password of the user.

Subversion-specific Options

Option	Description
<code>--svn-exe <value></code>	Full path to the `svn` command-line executable
<code>--svn-look-exe <value></code>	Full path to the `svnlook` command-line executable (used by Subversion triggers)

Option	Description
<code>--svn-repo-url <value></code>	Subversion repository URL
<code>--svn-user <value></code>	Subversion user name
<code>--svn-passwd <value></code>	Subversion password
<code>--svn-require-client-certificate-password <value></code>	Use this if you have a non-empty and unsaved password for your SSL Client Certificate
<code>--svn-auto-add</code>	Treat unversioned files as if they had been added to Subversion
<code>--svn-recurse-externals</code>	Recurse in the 'svn:externals' directories as if they were part of the same repository
<code>--svn-repo-path <value></code>	Full path to the repository (used by Subversion Triggers)

Team Foundation Server-specific Options

Client configuration settings depend on whether you use a self-hosted version or a SaaS version of Team Foundation Server known as Visual Studio Team Services. If you use the latter, then you will need to set-up alternate authentication credentials at first and then use these credentials for Collaborator clients. See [configuration instructions](#) ^[656].

Option	Description
<code>--tfs-collection <value></code>	<p>For self-hosted version of Team Foundation Server, specify the URL of Team Foundation Project Collection to work with.</p> <p>For SaaS version of Team Foundation Server, specify the URL of your Visual Studio Team Services account (without project or collection names).</p>

Option	Description
<code>--tfs-user <value></code>	The name of Team Foundation user. For SaaS version of Team Foundation Server, specify alternate primary user name.
<code>--tfs-passwd <value></code>	The password of the user. For SaaS version of Team Foundation Server, specify alternate password.

5.5.7 Command-line Reference

Description

Use the `ccollab` command to perform a number of Collaborator tasks from the command-line.

Command Line Syntax:

```
ccollab [global-options] command [command-options]
```

Sub-Commands

Sub-Command	Description
<code>help</code>	Display help on using the Command Line Client
<code>info</code>	Validates server connection and SCM configuration
<code>login</code>	Verify and/or change connection to the server
<code>logout</code>	Clears the stored password and/or login ticket id, and invalidates the user's login ticket on the server
<code>set</code>	Save a global option setting
<code>addchanges</code>	Attaches locally-modified files to a review
<code>addfiles</code>	Attaches local files to a review without diffs
<code>addchangelist</code>	Attaches an atomic changelist to a review

Sub-Command	Description
<code>adddiffs</code>	Attaches file differences to a Review
<code>addsvndiffs</code> ⁷²⁶	Uploads diffs generated from the svn diff command
<code>addardiffs</code> ⁵⁵²	Uploads diffs generated from accurev diff command
<code>addcvsdiffs</code> ⁵⁶¹	Uploads diffs generated from cvs diff command
<code>addgitdiffs</code> ⁵⁷⁷	Uploads diffs generated by git diff command
<code>addhgdiffs</code> ⁶⁵¹	Uploads diffs generated by hg diff command
<code>addp4diffs</code> ⁶⁹³	Uploads diffs generated from p4 diff2 command
<code>addversions</code>	Attaches any 2 given versions to a review
<code>addactivity</code> ⁶⁰³	Attaches file versions in a ClearCase activity to a review
<code>actionitems</code>	List current action items
<code>addstream</code> ⁵⁵²	Attaches pending differences from an AccuRev stream
<code>browse</code>	Launch a browser to the Collaborator Server homepage
<code>commit</code>	Commit changes in the review
<code>addp4job</code> ⁶⁹⁷	Adds all numbered local changes that fix a job to the review
<code>addurls</code>	Attaches urls to a review
<code>admin</code>	Perform administration tasks
<code>gitaddbranch</code> ⁵⁷⁸	Uploads diffs between the specified git branch and the remote-tracking branch.
<code>pinCoordinates</code>	Returns a list of pushpin coordinates and numbers for the particular file revision of the specified review.

5.6 IDE Clients

Collaborator provides a number of plugins for most popular integrated development environments (IDEs).

These plugins allow you to create Collaborator reviews directly from the user interface of your favorite IDE.

See the section below for your IDE:

- [Eclipse](#)^[464] (including, Eclipse-based applications)
- [Microsoft Visual Studio](#)^[503]

Important: Collaborator IDE Clients are designed to perform code reviews, rather than document reviews. That is, from within the IDE you can review and compare source code and text files, but may fail to review and compare other types of review materials. To review Word documents, Excel tables, PDF files, images, or URLs you should use the Collaborator [Web Client](#)^[286].

5.6.1 Eclipse Plug-in

The Collaborator Eclipse Plug-in works with many Eclipse-based applications.

Features

- View with [Action Item display](#)^[476]
- [Perform Reviews](#)^[477] without leaving Eclipse
- [Label Decorations](#)^[483] for local files under review
- [Markers](#)^[483] on local files for Defects in Reviews
- [Upload files](#)^[484] from local hard drive
- Integrates with existing source control plug-ins including [AccuRev](#)^[490], [ClearCase](#)^[490], [CVS](#)^[490], [Git](#)^[491], [Perforce](#)^[497], [Rational Team Concert](#)^[614], and [Subversion](#)^[500].
- [Update site](#)^[465] for automatic plug-in install and upgrade.

Compatibility

Eclipse base version 4.6 or higher (released versions only).

Eclipse-based applications known to work with the plug-in:

- Eclipse SDK
- IBM WebSphere

Known Issues

- Conversations View in Eclipse Oxygen does not split long line of text into multiple lines, because of this a horizontal scroll bar can appear if your conversation of checklist item contains long text.
- Collaborator Eclipse Plug-in is shipped with the Google Guava library version 20. Other Eclipse plug-ins may use another versions of this library and in some rare cases this may cause dependency conflicts.

5.6.1.1 Install & Update

Update Site

Eclipse can be configured to automatically download the Collaborator plug-in, and even to check periodically for updates. If you already know how to do this, all you will need to know is that our Eclipse update site is located here:

<http://eclipse.smartbear.com/12.0>

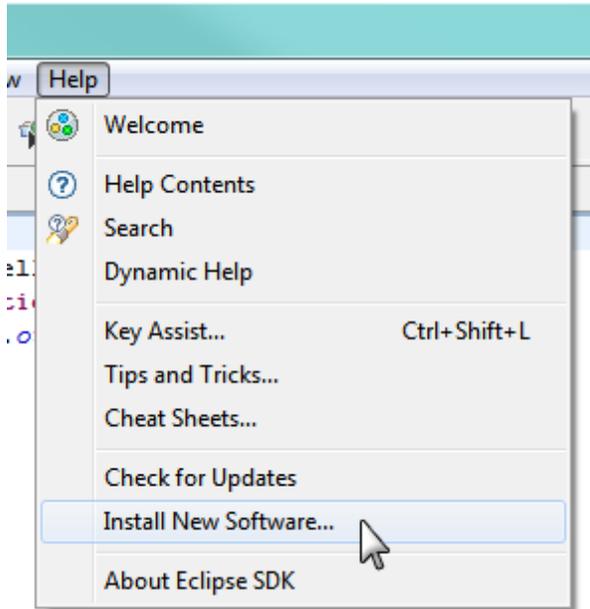
Otherwise, read on for step-by-step installation instructions.

Installation Instructions

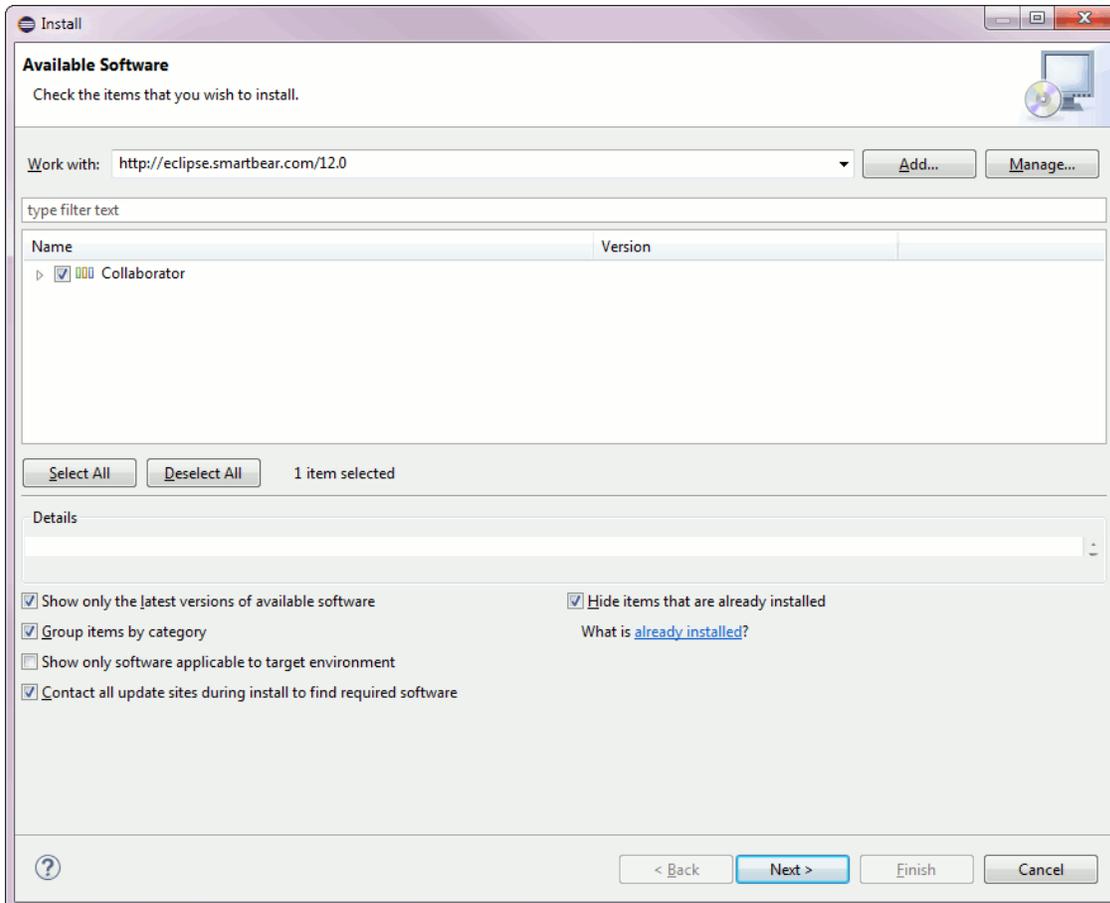
Here are detailed instructions for how to install our plug-in in Eclipse:

1. Open Eclipse IDE.

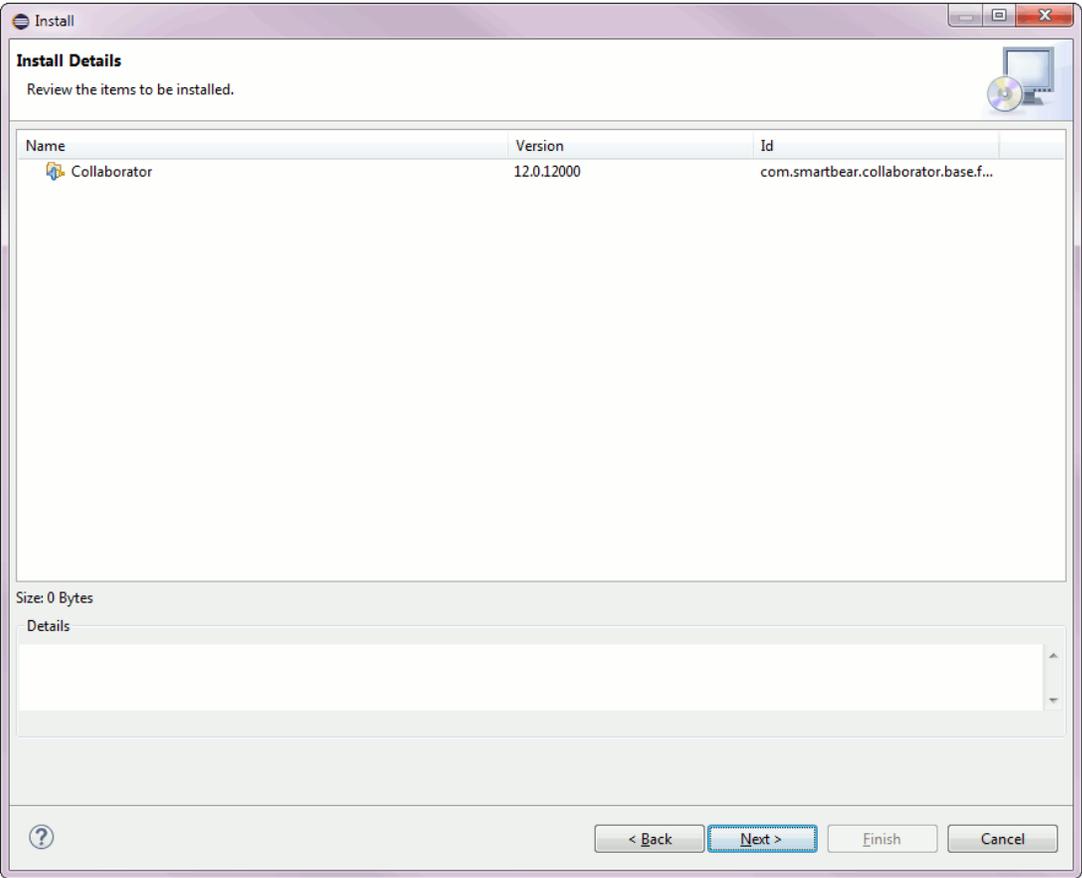
2. Select **Help | Install New Software** from the main menu.



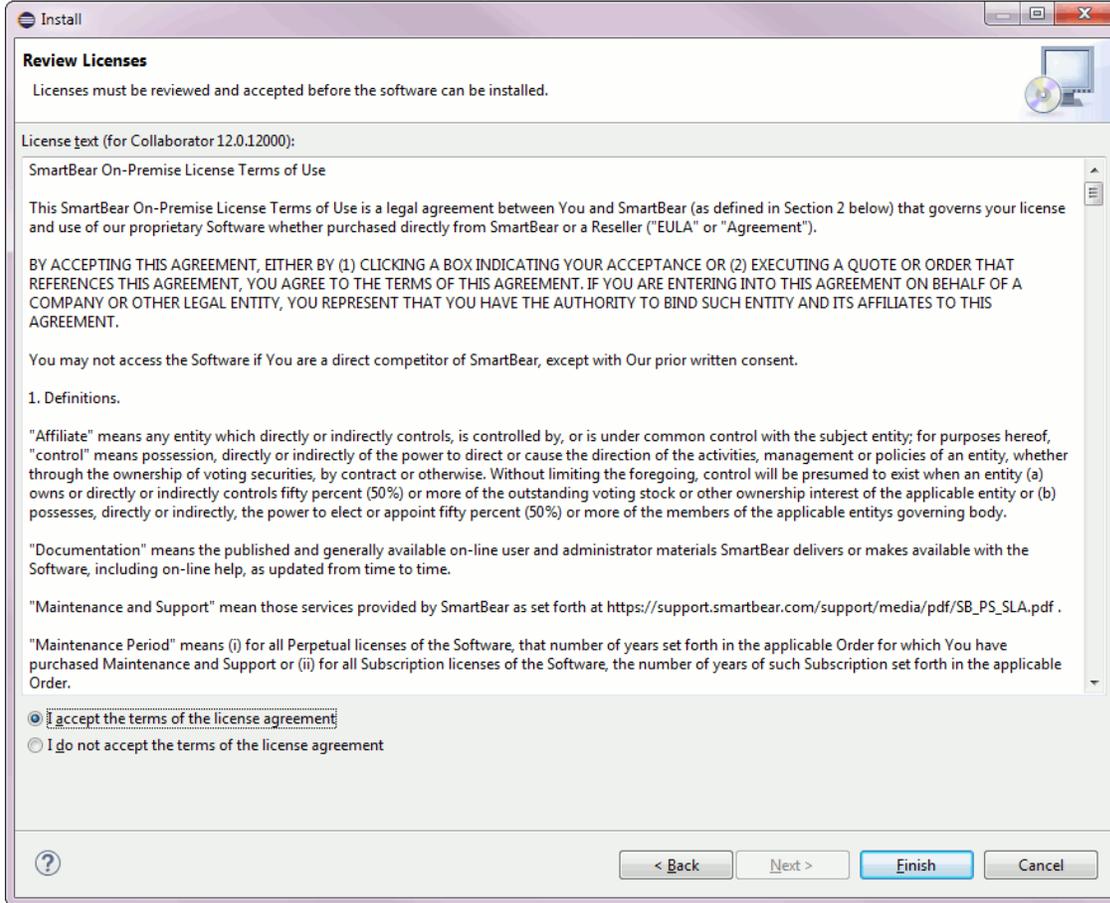
3. Type "<http://eclipse.smartbear.com/12.0>" in the **Work with** field and press Enter. Then check "Collaborator" and click **Next**.



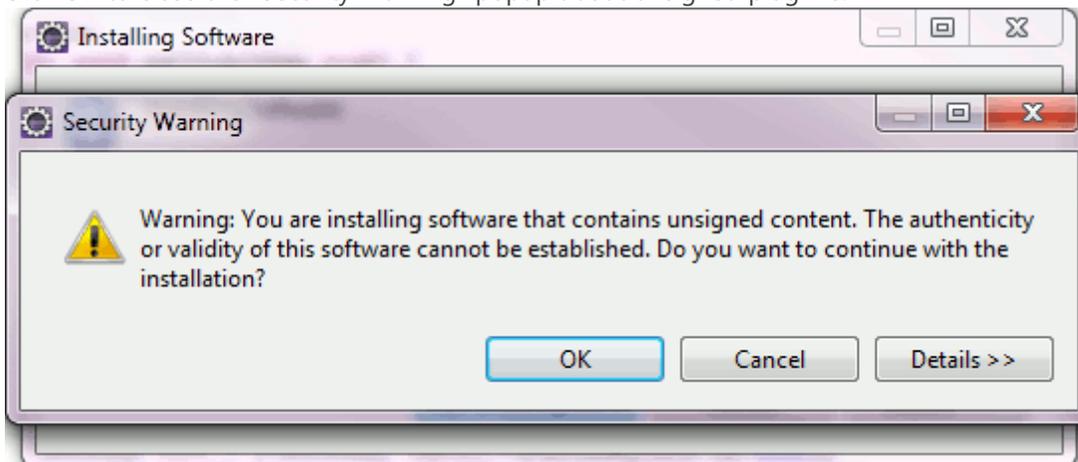
4. Click **Next** to finish the "Install Details" page.



5. Check "I accept the terms of the license agreement" and click **Finish** to start the install.



6. A progress dialog appears as Eclipse installs the plug-ins.
7. Click **OK** to close the "Security Warning" popup about unsigned plug-ins.

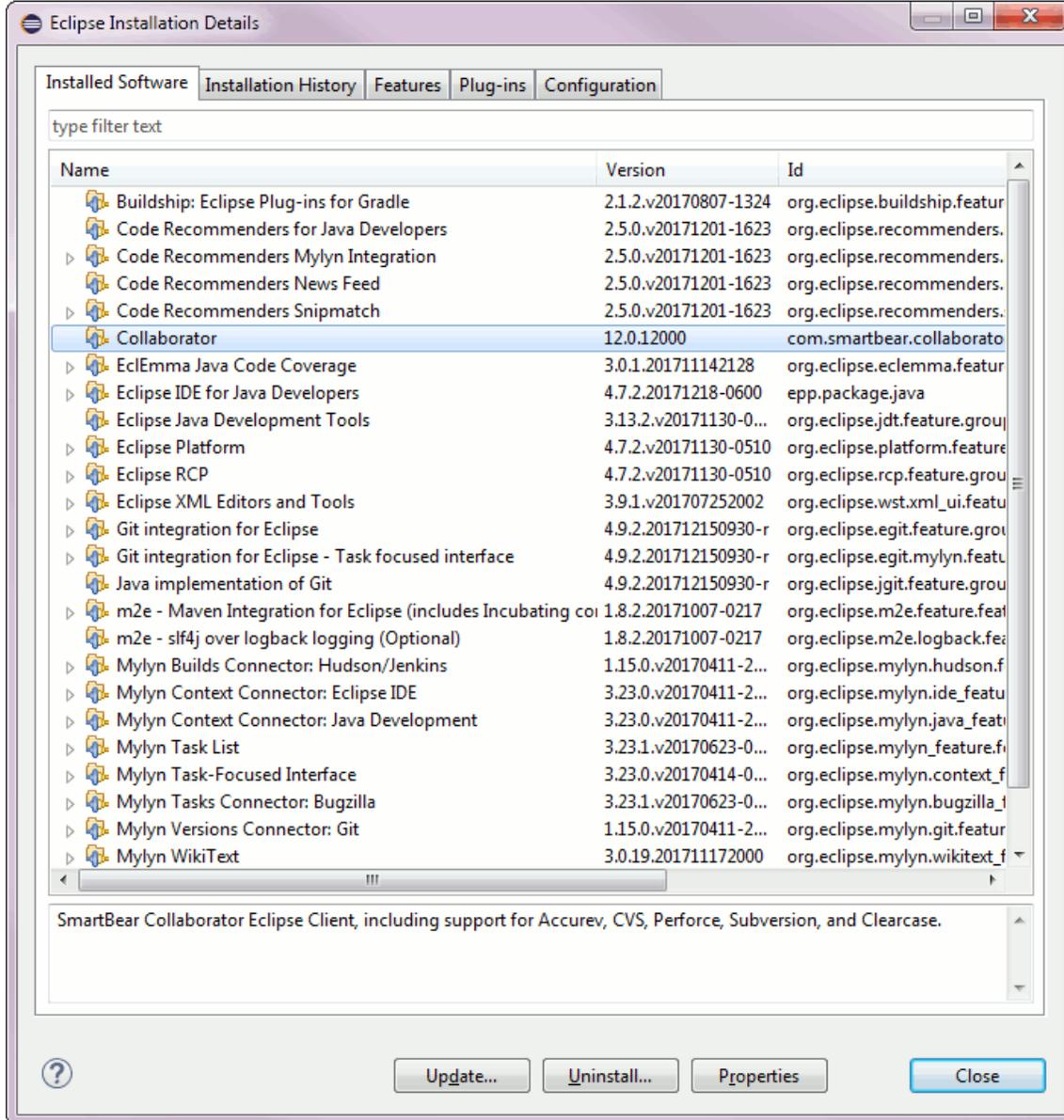


8. Click **Yes** in the "Software Updates" popup to restart Eclipse.
9. **Done!**

Uninstallation Instructions

To uninstall the plugin:

1. Open Eclipse IDE.
2. Select **Help | About** from the main menu. Click **Installation Details**. This will open a dialog with more details about your installation.
3. Click the **Installed Software** tab to see a list of the software items that you have installed into your system.

4. Select Collaborator and click **Uninstall**.

Additionally you will need to remove the Collaborator's Eclipse Plug-in files from the Eclipse plugins folder. This is especially important if you plan to re-install the plugin later.

1. Go to Eclipse plugins folder. It is typically located at the following path:

```
<user_home>/ .p2/pool/plugins
```

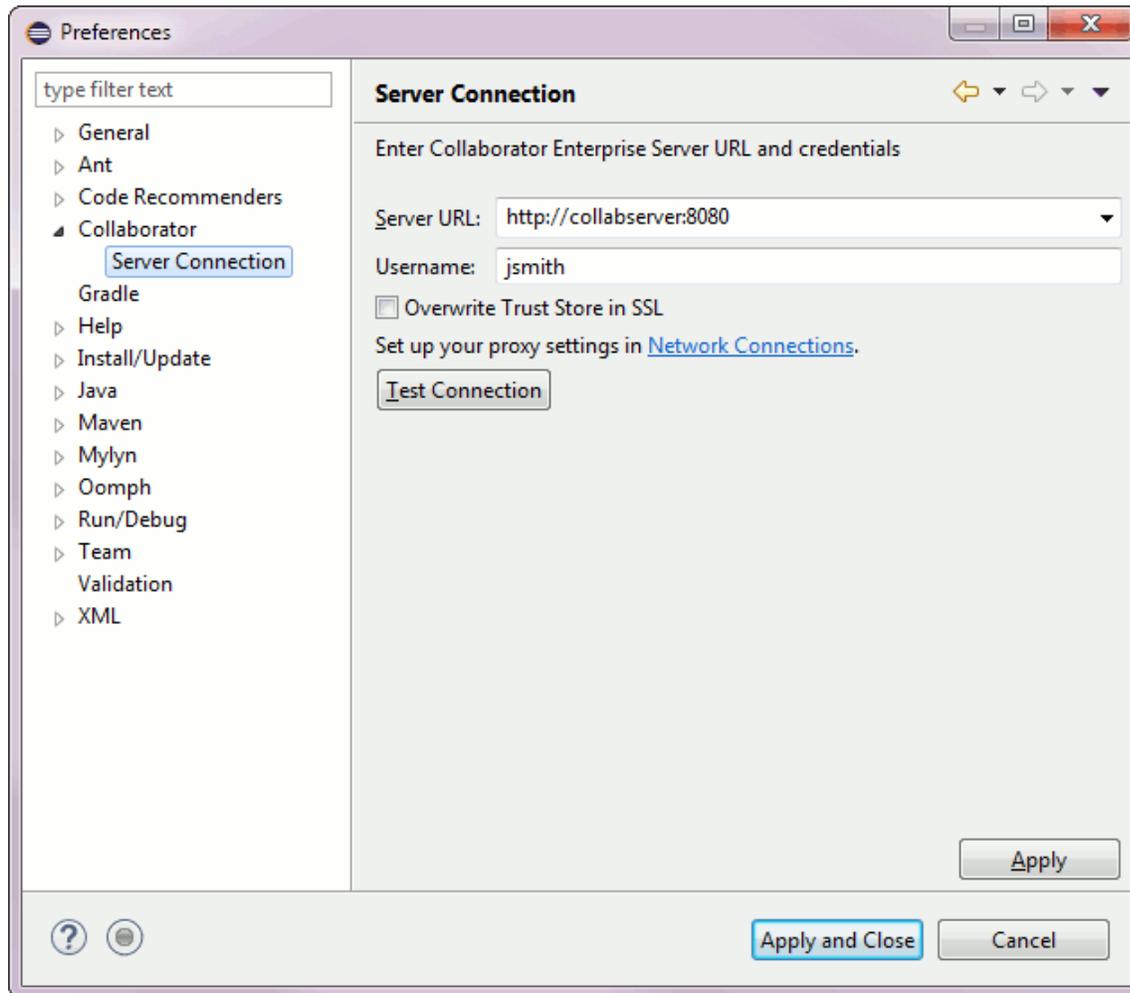
2. Select all jar-files and folders that start with **com.smartbear.collaborator**.

3. Delete these files and folders from the Eclipse plugins folder.

5.6.1.2 Preferences & Configuration

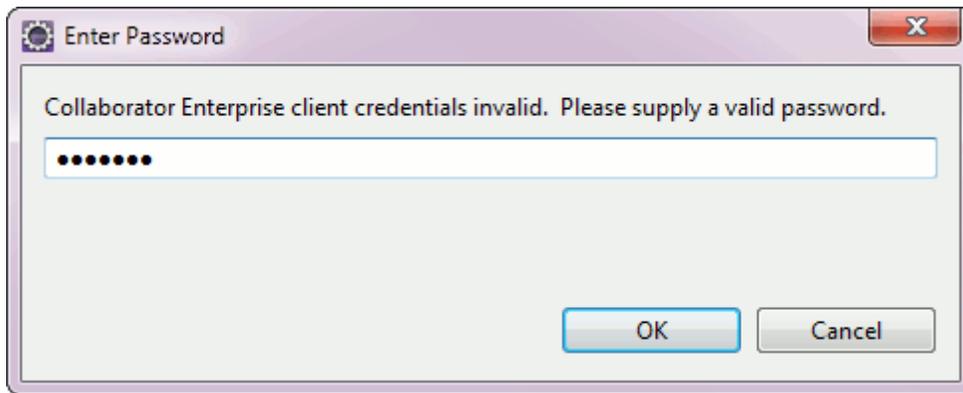
You must configure your connection to the Collaborator server; all other preferences are optional.

You can find the Eclipse Plug-in configuration in the Preferences dialog along with all other application preferences:



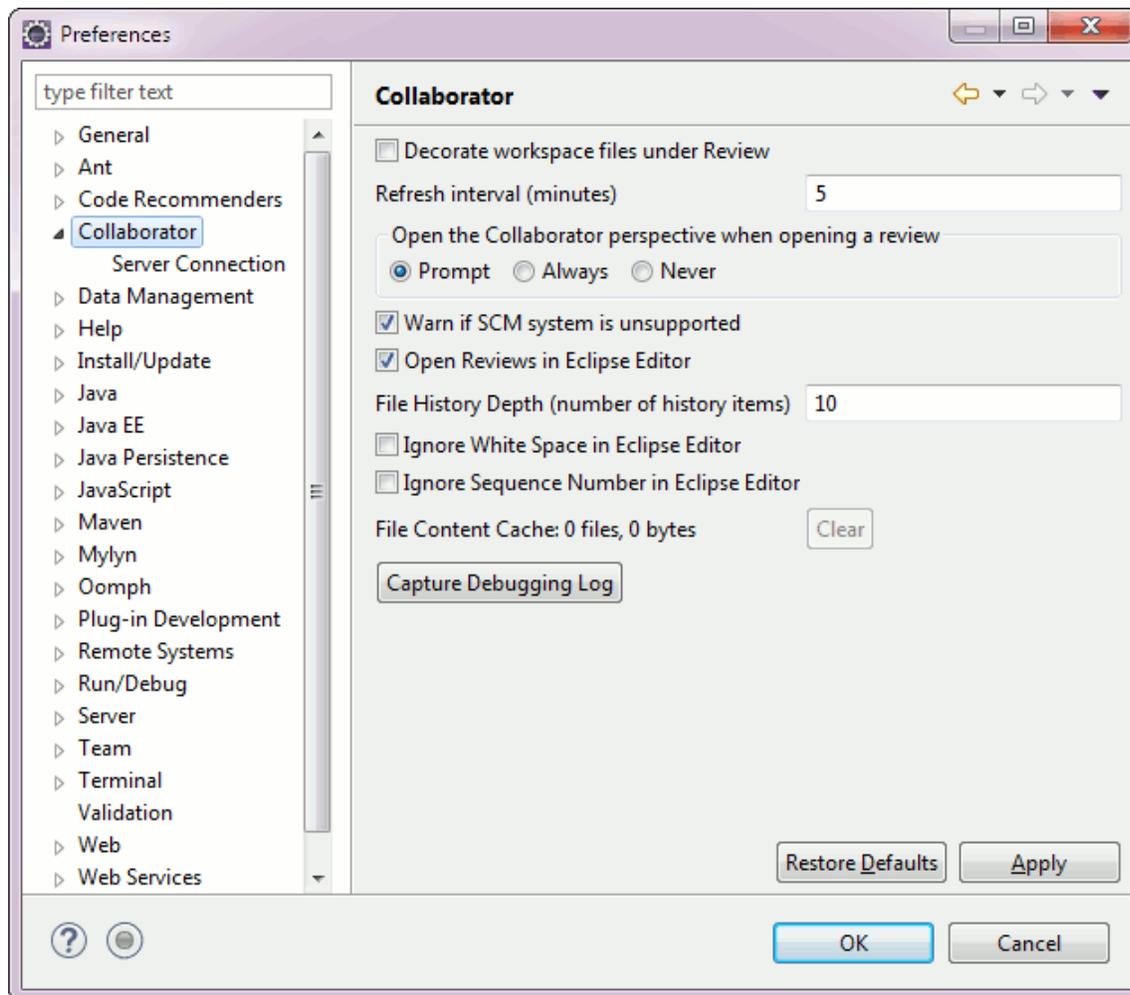
The Server URL must include the correct port number and path if applicable. The Username and Password are the same as you use when [logging into the web server](#) ²⁸⁹.

The password entry is presented on the following connection form:



Also, you may specify whether Eclipse Plug-in should override the `java.net.ssl.truststore` VM option with hard coded default values (`$JAVA_HOME\lib\security\cacerts`). The latter option requires restarting the Eclipse in order to apply.

Use the Test Connection button to make sure the connection is working. If it fails the error message will be helpful.



Decorate workspace files under review

Specifies whether to enable [Label Decorations](#) ^[483] for files which are currently under review.

Refresh interval

How often to refresh the [Action Items View](#) ^[476] with data from the server. [Markers](#) ^[483] and [Label Decorations](#) ^[483] are also refreshed at this time.

Open the Collaborator Perspective when opening a Review

Automatically switch to the [Collaborator Perspective](#) ^[476] when opening a Review.

Warn if SCM system is unsupported

When [adding files to a Review](#) ^[488], warn if SCM system (or client) is not supported.

Open Reviews in Eclipse Editor

Open Reviews in the Eclipse [Review Editor](#)^[477]. If this option is not checked, Reviews will be opened in a browser.

File History Depth

Specifies the number of file revisions to keep.

Ignore White Space in Eclipse Editor

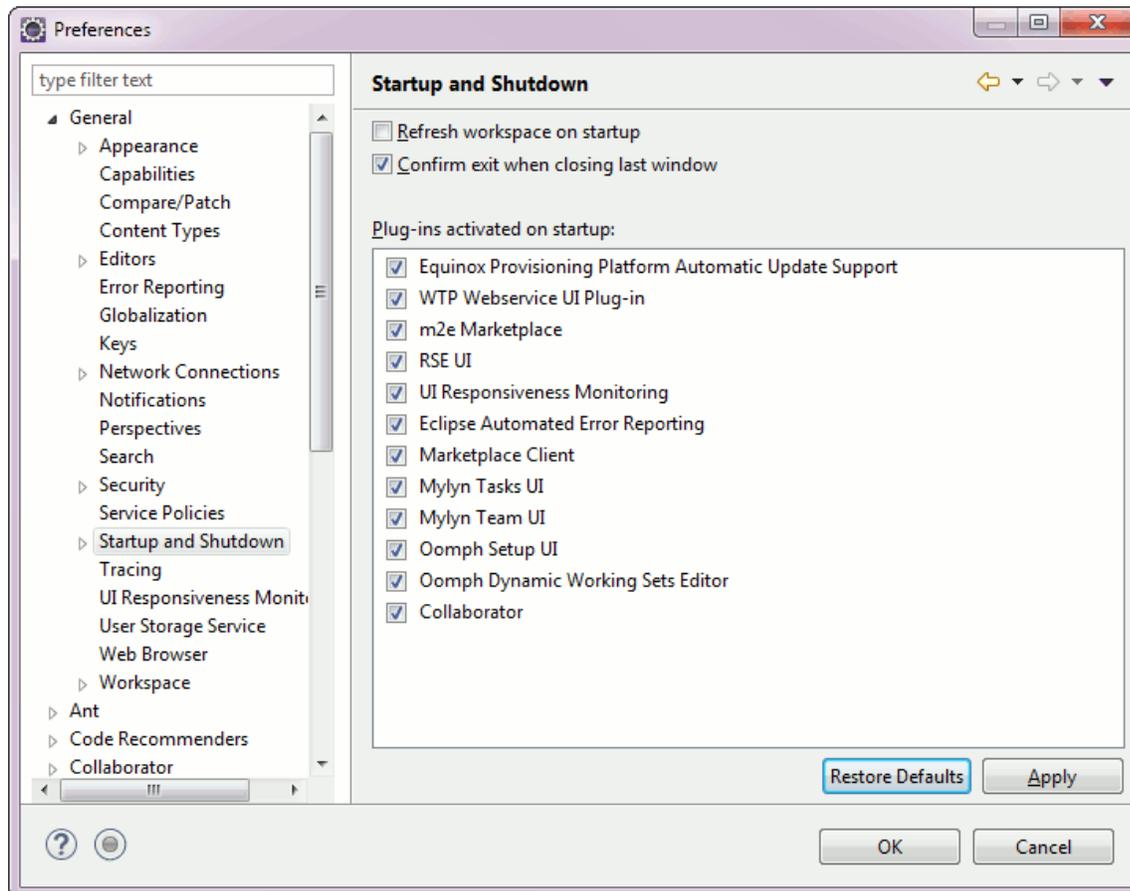
Controls whether white-spaces are taken into account when showing differences in Eclipse [Compare Editor](#)^[482].

Ignore Sequence Number in Eclipse Editor

Controls whether COBOL sequence numbers are taken into account when showing differences in Eclipse [Compare Editor](#)^[482].

File Content Cache

The estimated size of the local file content cache. Press Clear to delete the local content cache (content will be automatically downloaded from the server as needed).

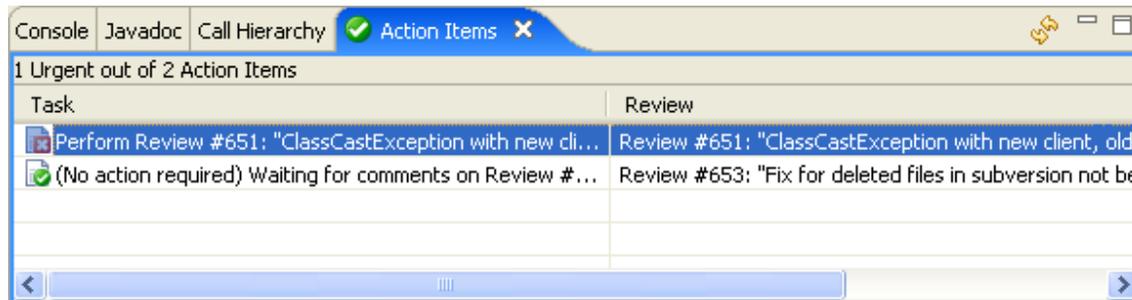


The Collaborator Eclipse Plug-in registers itself with Eclipse to be started automatically when Eclipse starts up. This is necessary to refresh [Markers](#)^[483] and [Label Decorations](#)^[483] automatically. If you un-check Collaborator from the Plug-ins activated on startup list then [Markers](#)^[483] and [Label Decorations](#)^[483] will not appear until the first time you show the [Action Items View](#)^[476].

5.6.1.3 Action Items

To open your Collaborator Action Items in Eclipse, select Window -> Show View -> Action Items.

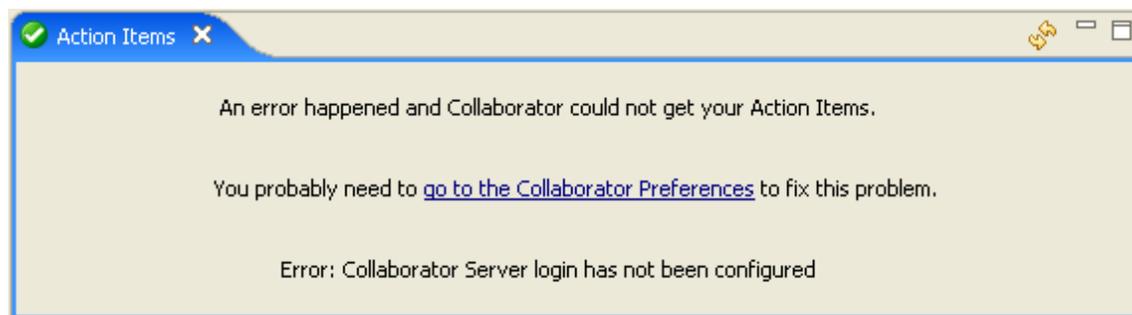
Your Collaborator Action Items appear in Eclipse as a View:



Double-clicking any item will open the Review in the [Review Editor](#)^[477] or your configured web browser, depending on your [preferences](#)^[476].

The list of Action Items automatically refreshes periodically (the rate is [configurable](#)^[474]). You can refresh manually using the double-arrow icon in the toolbar. [Markers](#)^[483] and [Label Decorations](#)^[483] refresh at the same time as Action Items.

If there was an error communicating with the server, the View will display an error message instead and you might need to visit your [preferences](#)^[472] to fix connection settings:



5.6.1.4 Collaborator Perspective Window

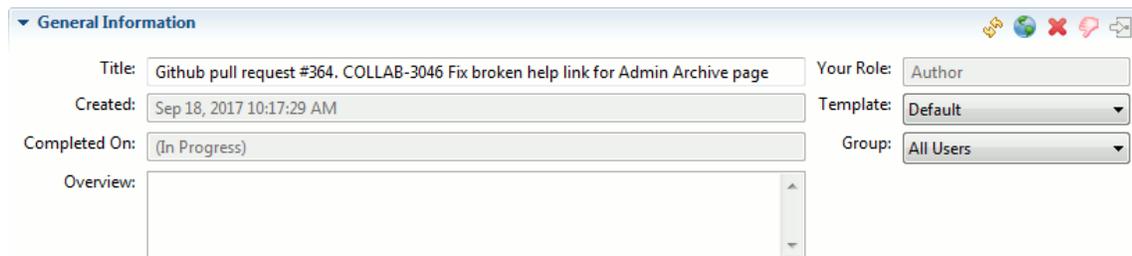
The Collaborator Perspective window is useful for organizing your screen to perform reviews in Eclipse. By default it contains the Editor Area, the [Conversations View](#)^[480], and the [Action Items View](#)^[476].

The Collaborator Perspective window can be [configured](#)^[474] to open automatically when you open a Review from the [Action Items View](#)^[476].

5.6.1.5 Review Editor

Double-clicking an [Action Item](#)^[476] will open the associated Review in the Review Editor. (If you prefer, you can [configure your preferences](#)^[475] to open the Review in a web browser instead.) This editor lets you perform a Review without leaving Eclipse. The content of the editor updates automatically as the Review changes (other users make comments, new files are uploaded, and so on).

When the Review Editor is active, the [Conversations View](#)^[480] will show the overall Review conversation.

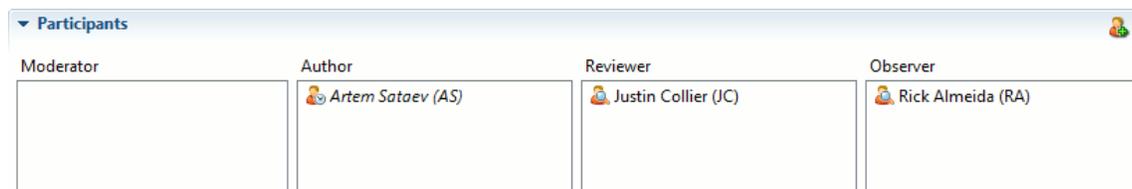


The screenshot shows the 'General Information' section of the Review Editor. It contains the following fields and controls:

- Title:** Github pull request #364. COLLAB-3046 Fix broken help link for Admin Archive page
- Created:** Sep 18, 2017 10:17:29 AM
- Completed On:** (In Progress)
- Overview:** A large text area for notes.
- Your Role:** Author
- Template:** Default
- Group:** All Users

Toolbar icons include a globe, a red X, a speech bubble, and a refresh icon.

The [General Information](#)^[320] section shows you information about the Review as a whole, and lets you edit certain fields, including Review [custom fields](#)^[235]. Toolbar buttons in this section allow to refresh review information, open review in a web-browser, cancel, reject or re-open the review.



The screenshot shows the 'Participants' section of the Review Editor. It displays a table of participants with their roles and names:

Moderator	Author	Reviewer	Observer
	Artem Sataev (AS)	Justin Collier (JC)	Rick Almeida (RA)

Toolbar icons include a globe and a person icon.

The [Participants](#)^[322] section shows the users participating in this Review and their Roles. You can change a user's Role by dragging-and-dropping them to a different Role. You can remove a user from the Review by right-clicking and selecting Remove from the context menu.

Click the Add Participants... icon in the toolbar of the Participants section to toggle the section for adding a new Participant to the Review.

Filter:

-  Christina Lowe (clowe)
-  Greg Lord (glord)
-  Luis Luna (lluna)
-  Patrick Londa (plonda)
-  Test4 Last (test4)

Filter Users: (You have a lot of users, start typing a name to narrow the list)

Filter Users by Group 'All Users'

Show all Users

Add Self As:

- [Moderator](#)
- [Author](#)
- [Reviewer](#)
- [Observer](#)

Recent Participants:

- [Justin Collier as Reviewer](#)
- [Konstantin Plotnyk as Reviewer](#)
- [Vitaly Sheyneman as Reviewer](#)

Drag users from the list to one of the Role lists above to add them to the Review in that Role. You can also click one of the **Add <Role>** buttons to add the selected users to the Review in that Role. Click on the links in the **Recent Participants** area to quickly assign recent participants to the Review. Typing in the **Filter** field will filter the users list to help you find the users you want.

Participant Custom Fields

	NK	PJ	RP	
Phantom Inspector	Yes	Yes	Yes	

The Participant Custom Fields section shows the value of Participant Custom Fields²³⁵ for each Participant. Note this section only appears if the Template²³⁰ of this Review has Participant Custom Fields configured.

Checklist

Status	Title	User	Date

The Checklist³²¹ section displays the checklist associated with the review (if any).

Remote System Links

Reference:

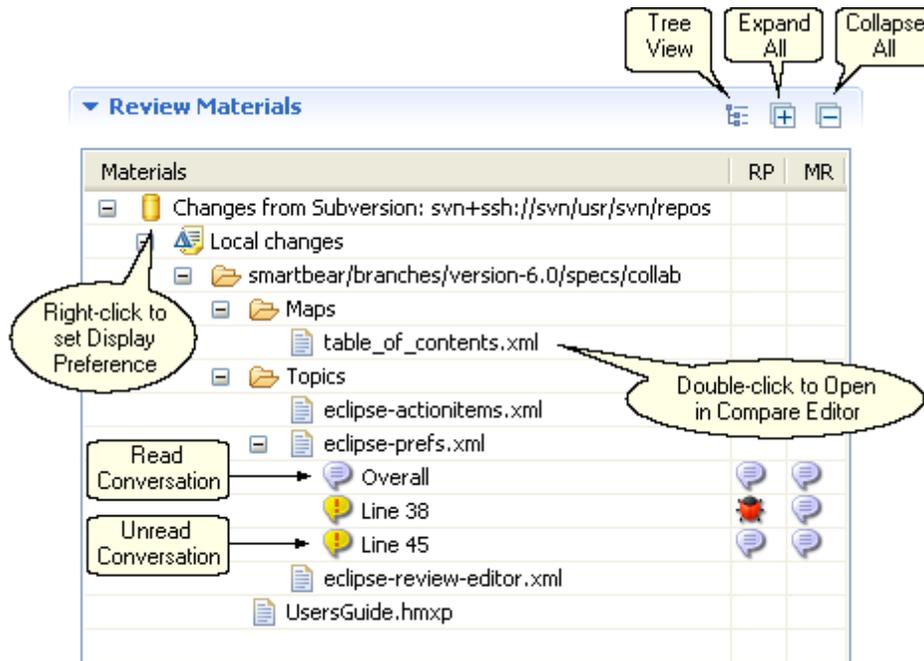
Remote System:

Remote System	Linked Item	Status	Action	Remove
SmartBear/collab-windows	PR#66: Add info on SCM settings	OPEN		
SmartBear JIRA	COLLAB-2039: VS Plugin: Supp... Documents dialog appearance	IN PROGRESS		

The [Remote System Links](#)^[323] section lists all pull requests, direct pushes and issue-tracking items linked with this review. Because of a limitation of the SWT control, the Remote System Link table cannot have multi-line cells. When multiple items are linked (for example, multiple commits), the table displays only the first item. The full list of linked items will be displayed in the cell's tooltip and in the Overall Chat section.

▼ Defect Log				
	ID	Creator	Severity	Description
	D3464	RP	Major	get required number or participants fro...
	D3465	RP	Minor	Get custom label for role from config
	D3466	RP	Major	communicate "not allowed to finish" with...

The [Defect Log](#)^[324] section shows all of the Defects in the Review, both overall Review Defects and Defects on files.



The [Review Materials](#)^[327] section shows the changelists and files which are part of the Review. Double-click on a file to open it in the Compare Editor.

The section toolbar controls how the materials are presented:

- Tree View** The presentation of folders. You can select from **Compressed Tree**, **Tree**, and **Flat**.
- Expand All** Expand all levels in the tree.

Collapse All Collapse all levels in the tree.

Right-click on the "Version Control" icon to set your Display Preference for that Version Control system. Depending on the Version Control system and available changelists, you can select from Do not Roll Up, Roll Up All Changelists, and Roll Up Non-Atomic Changelists.

Conversations on files are listed underneath the files in the tree. If the conversation has unread comments the icon is highlighted in yellow.

▼ **Moving On**

You have unread comments. You must either post a response or mark the comment as "read" before you can finish the review.

I am **Waiting** until **Activity by Author Occurs** ▼

I am **Finished** until **Any Activity Occurs** ▼

The Moving On^[319] section allows you to specify whether you are **Waiting** on Review activity or have **Finished** with the Review (with the option to re-engage based on future activities). These choices move reviews into different phases. The options in "Moving On" vary depending on the Phase of the Review and your Role. "Moving On" also allows you to control - to a certain extent - the notifications you receive for a particular Review.

5.6.1.6 Conversations View

The Conversations View displays conversations on the most recently focused Review Editor^[477] or Compare Editor^[482]. For the Review Editor^[477] the Conversations View shows the overall Review conversation. For the Compare Editor^[482] the Conversations View shows all the conversations on the file.



Unread Comments are highlighted with a yellow background. You can mark conversations Accepted or Read. You can add Comments. You can create or modify Defects. You can start a conversation at a new location or add to an existing one.

Right-click on a Comment and select Redact to redact it. Redacted comments are grayed-out.

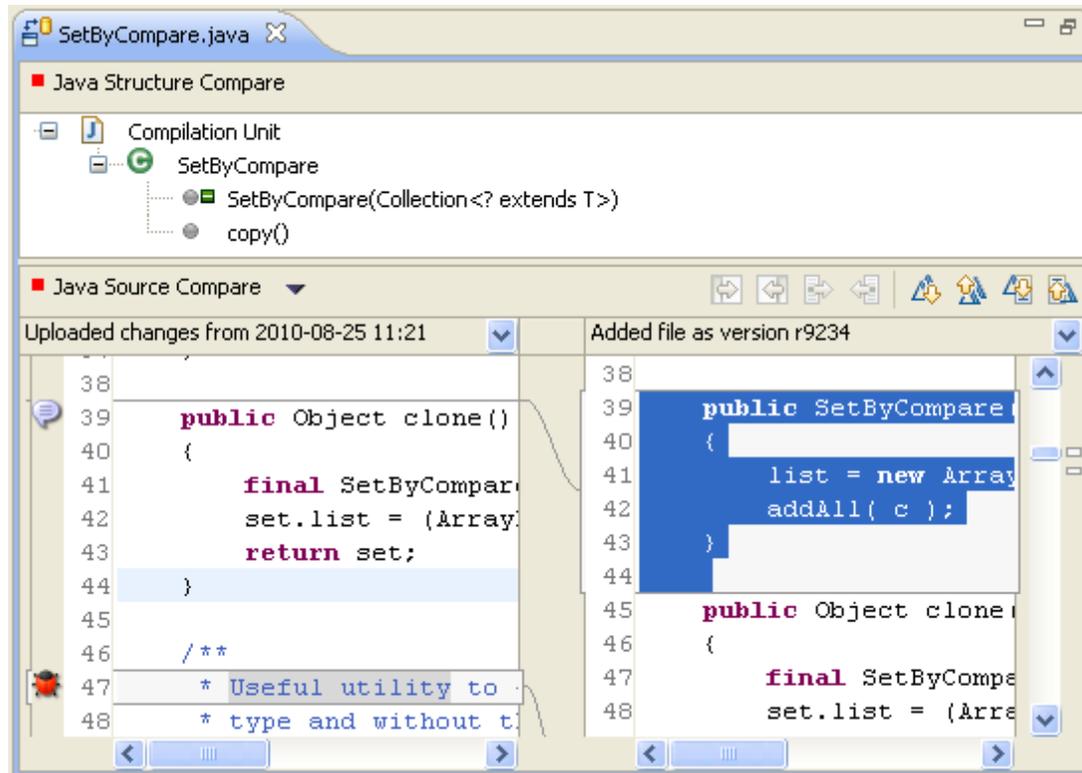
Known Issue

Conversations View in Eclipse Oxygen does not split long line of text into multiple lines, because of this a horizontal scroll bar can appear if your conversation or checklist item contains long text.

5.6.1.7 Compare Editor

Double-clicking on a file in the [Review Editor](#)^[479] opens it in the standard Eclipse [Compare Editor](#).

Important: Collaborator Eclipse Client is designed to perform code reviews, rather than document reviews. That is, from the Compare Editor you can review and compare source code and text files, but may fail to review and compare other types of review materials. To review Word documents, Excel tables, PDF files, images, or URLs you should use the Collaborator [Web Client](#)^[286].



Conversations on the file are shown in the [Conversations View](#)^[480] when the Compare Editor is active.

The exact appearance of the Compare Editor depends on the type of file being compared. The Collaborator Eclipse Plug-in uses the compare viewer registered in your Eclipse installation for that file type, and then tries to add review-related controls on a best-effort basis.

Side-by-side Compare Viewers

If the registered compare viewer for the file type is based on the standard Eclipse side-by-side compare viewer, the Collaborator Eclipse Plug-in adds a drop-down menu above each content pane to select which versions of the file you want to compare.

If the file was uploaded from your machine, you can select **Local File** from the menu to compare against the local version of the file. Comparing against the local version of the file lets you navigate the code in your workspace (for example, **ctrl-click** to open a type or method implementation), and edit the code in-place. You can also right-click on the pane containing the local file and select from many of the same context menu options that you can when you right-click on the file in the normal Eclipse editor.

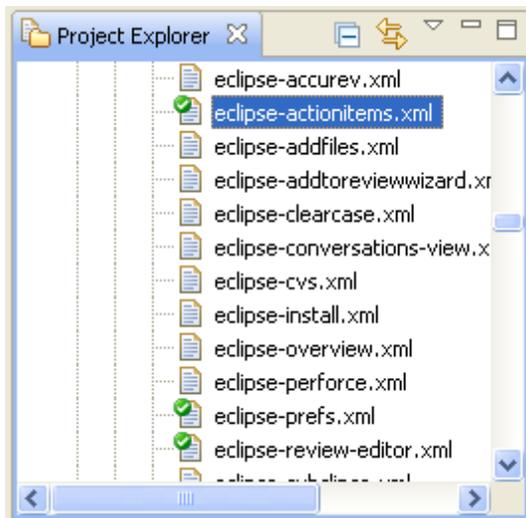
Text Compare Viewers

If the registered compare viewer for the file type is based on the standard Eclipse text compare viewer, the Collaborator Eclipse Plug-in adds a ruler to the left content pane showing the state of each conversation on the file. Clicking on a line selects that conversation in the [Conversations View](#) ^[480], or starts a new conversation if there is not already one on that line.

Syntax highlighting is shown if it is supported by the registered compare viewer for the file type.

5.6.1.8 Label Decorations

A green check-mark is displayed on files in your workspace which are currently under review. This decoration is updated whenever your [Action Items](#) ^[476] refresh. You can disable this decoration using the standard Eclipse preferences page under General->Appearance->Label Decorations->Collaborator.



5.6.1.9 Markers

The Eclipse Plug-in creates Eclipse Markers for every Defect in a Review that is on a file that came from your computer. The Markers are updated when your [Action Items](#) ^[476] refresh.

Problems View

Markers appear as Problems of different severity, depending on the Defect state.

- Open Defect -> Error
- Externalized Defect -> Warning
- Fixed Defect -> Info

Marker Bar

When you open a file in an Eclipse text-based editor, Markers appear in the Eclipse Marker Bar. Different Icons are used for each Defect state.

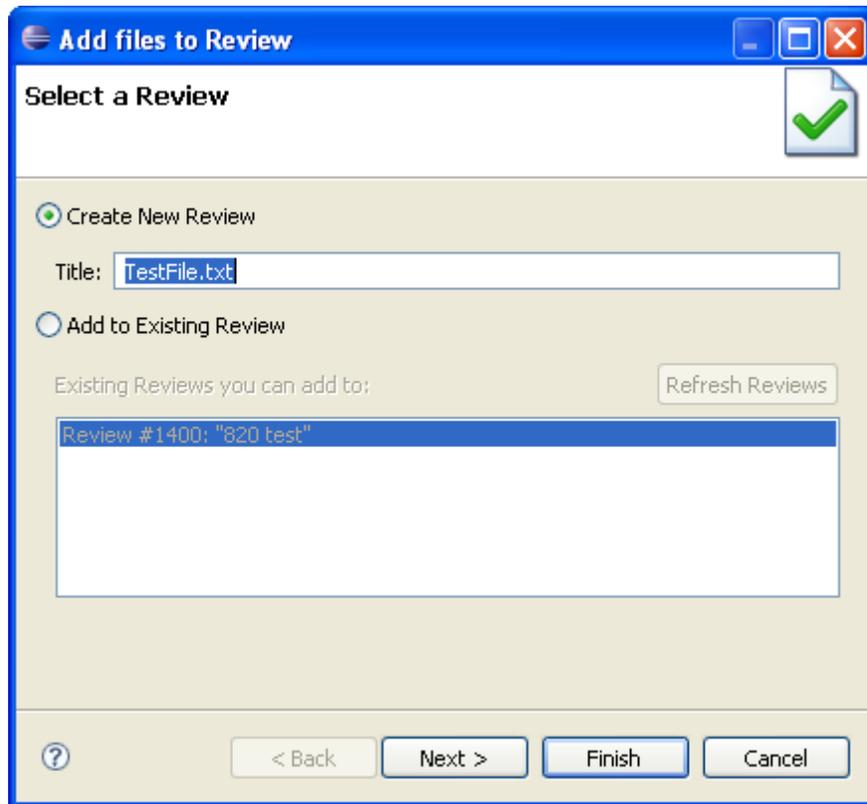
5.6.1.10 Add to Review Wizard

The Add to Review Wizard lets you add review materials to a new review or an already existing review.

The first page of the Add to Review Wizard asks you which review you would like to add materials to. You can create a new review and add the materials into the newly created review, or you can add the review materials to an existing review.

To add materials to a new review, select "Create New Review," and type a title to name your new review.

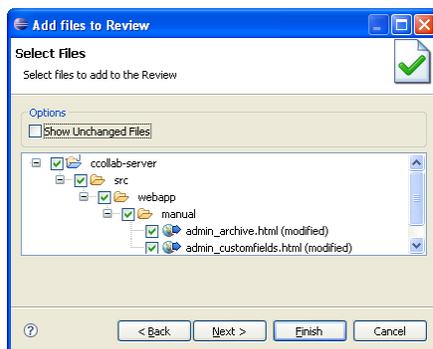
To add materials to an existing review, select "Add to Existing Review". Choose the review you would like to add the materials to. The list of possible reviews is created automatically by querying the server. This will generally be the same as the list of reviews in your [Action Items](#) ³⁰⁷ list.



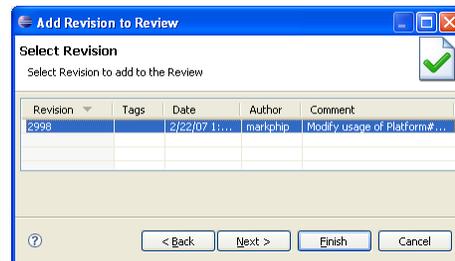
At this point, you can **Finish** the wizard or click **Next** to get more options.

Select Review Materials

The next page lets you choose exactly which materials are added to the review. This page looks different depending which materials you are adding to the review:



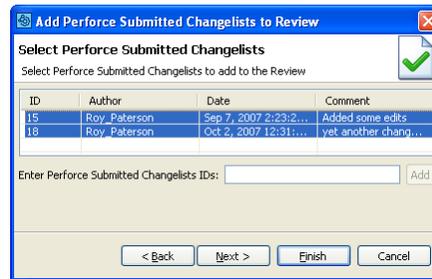
Adding Files to a Review ⁴⁸⁸



Adding (Subversion) Revisions to a Review ⁵⁰¹



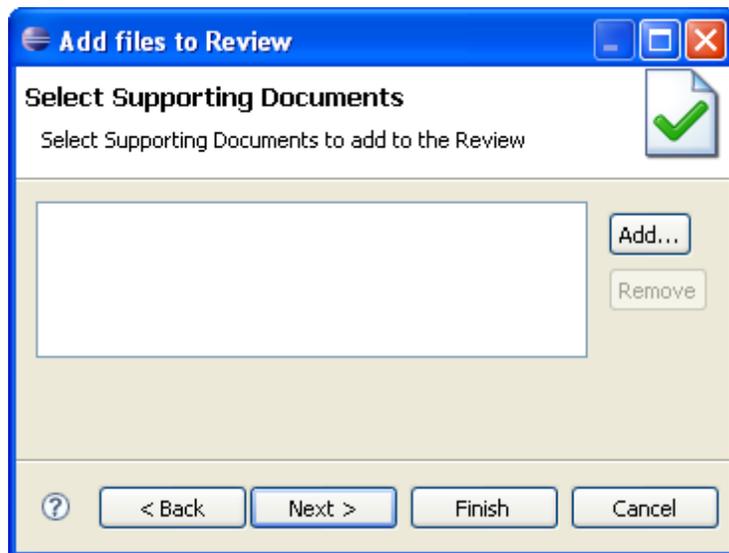
Adding (Perforce) Pending Changelists to a Review⁴⁹⁷



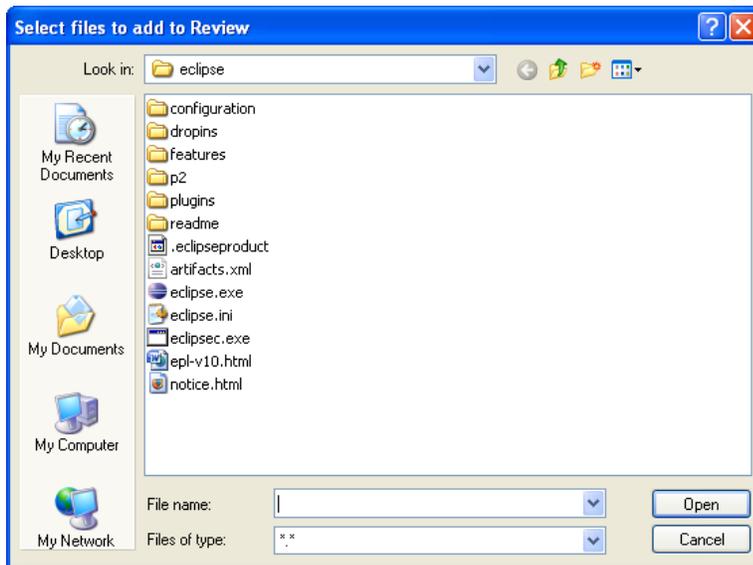
Adding (Perforce) Submitted Changelists to a Review⁴⁹⁹

Select Supporting Documents

The next page allows you to upload additional files from anywhere on your local hard drive:



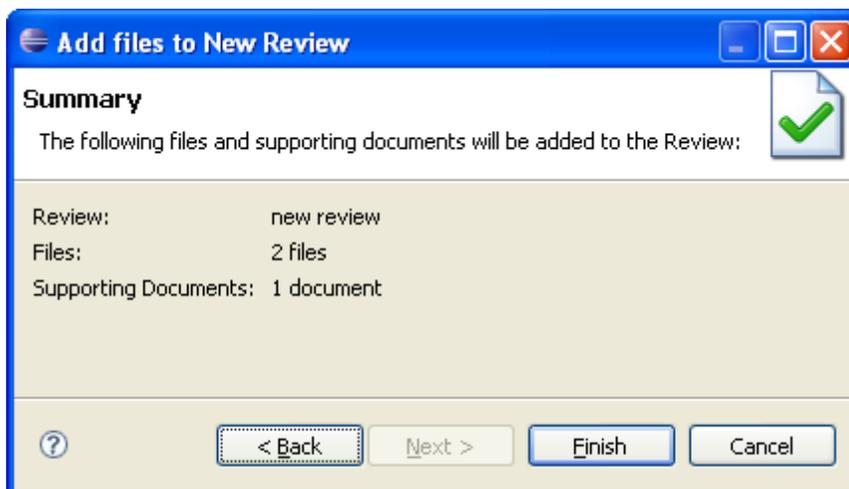
Click "Add" to choose the documents you would like to add:



You can also remove documents by selecting the document in the list above and clicking "Remove".

Summary

The final page summarizes the selections of the previous pages:

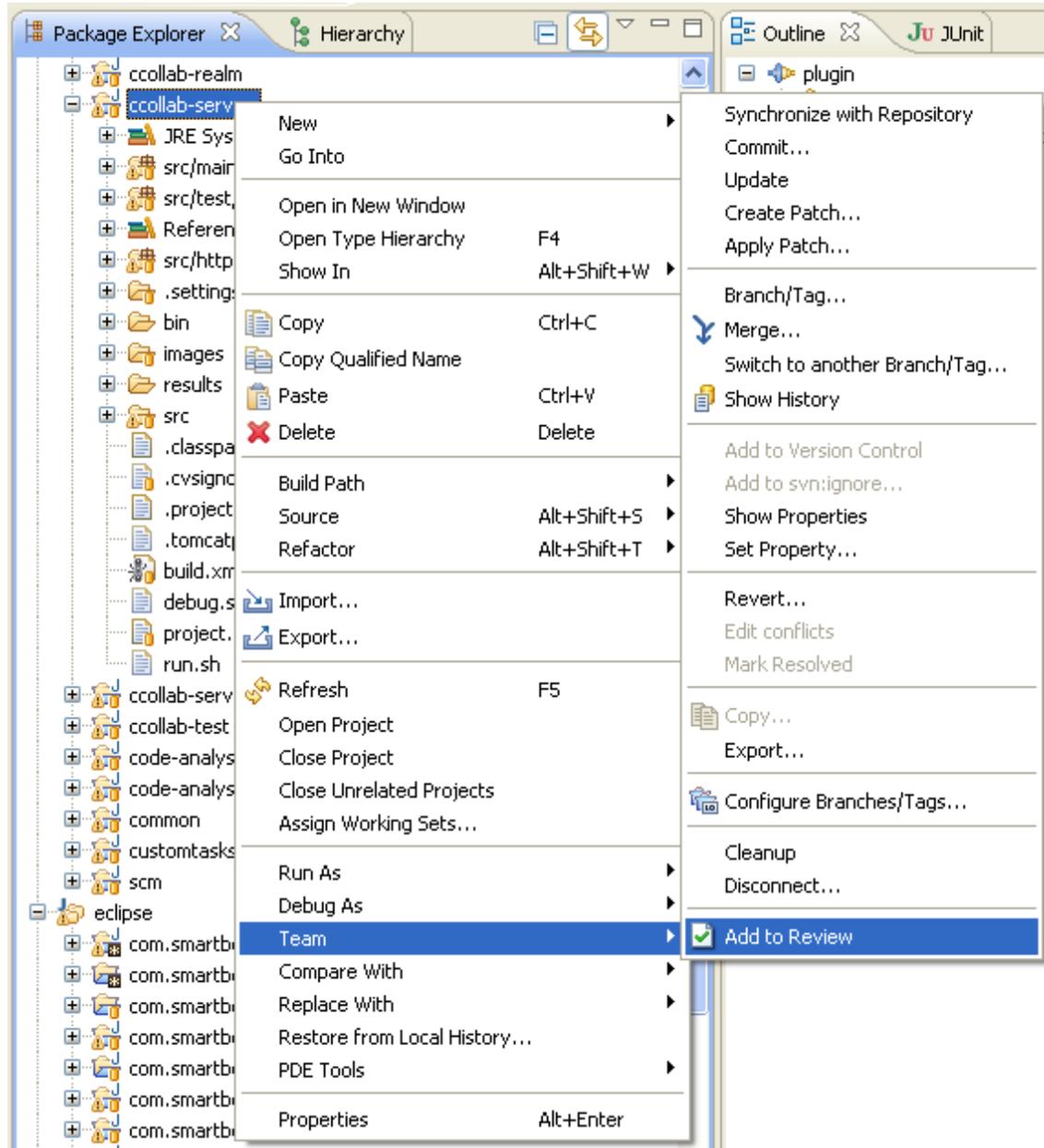


When the Finish button is clicked, all review materials are uploaded to the Collaborator Server for review. If uploading takes a long time, a progress dialog will appear during this operation. The progress dialog can be minimized if you do not want to wait for the operation to complete.

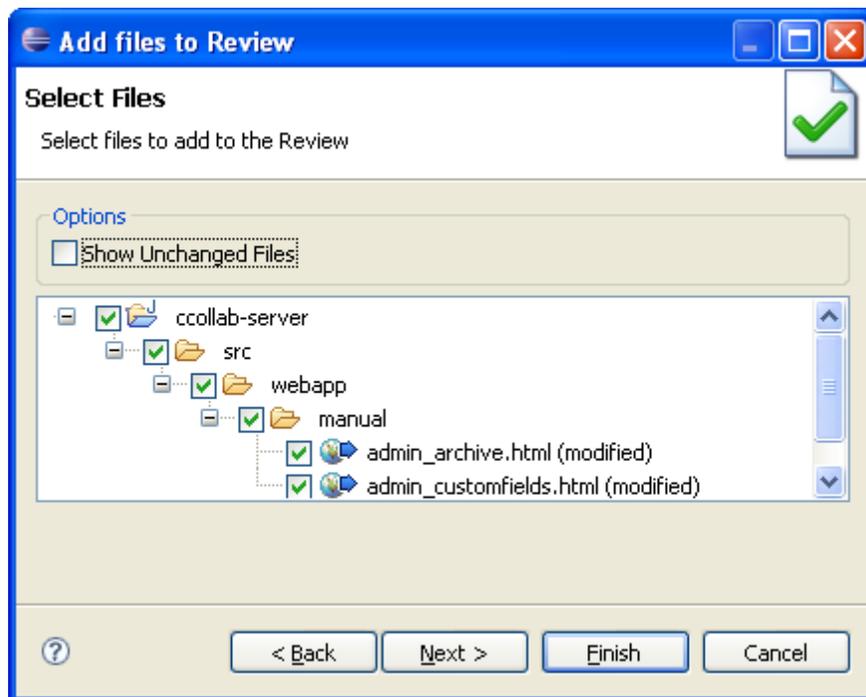
When the operation is complete the Review open in the [Review Editor](#)⁴⁷⁷, or in the browser based on your [preferences](#)⁴⁷⁵.

5.6.1.11 Adding Files to a Review

Right-click on any Working Sets, Projects, Folders, or Files and select either **Add to Review** from the **Team** menu.



Clicking **Add to Review** will launch the [Add to Review Wizard](#) ⁴⁸⁴. The wizard will include a page that shows the list of resources you selected, allowing you to select exactly which ones you want to upload:



Any files you selected specifically will appear here. If you picked groups of files (that is, directories, projects, and so on), that are managed by AccuRev, ClearCase, CVS, or Subversion these will be scanned for modified files, and those modified will be in the list. Check boxes allow you to pick more or fewer files than you originally selected.

The Show Unchanged Files option allows you to select files which have not been modified.

The Team | Add to Review command uploads local copies of selected files. Once uploaded, they will be no longer synchronized with the SCM. To denote this, the Eclipse Plug-in displays an "Unsupported SCM System or Client"⁴⁷⁴ warning when you try to upload the local copies of files.

To upload files to a review and keep them synchronized with the SCM:

- in CVS, add them from the Synchronize⁴⁹⁰ view.
- in Perforce, add them from the P4 Pending Changelists⁴⁹⁷ view or from the P4 Submitted Changelists⁴⁹⁹ view.
- in Subversion, add them from the Synchronize⁵⁰⁰ view or from the History⁵⁰¹ view.

Finishing the Add to Review Wizard⁴⁸⁴ will upload your files to the Collaborator Server.

5.6.1.12 AccuRev Integration

The Collaborator Eclipse Plug-in integrates with the AccuRev Plug-in for Eclipse from <https://www.microfocus.com/documentation/accurev/>.

Adding AccuRev files to a Review

Files managed by AccuRev can be uploaded to the Collaborator Server by [Adding Files to a Review](#)⁴⁸⁸.

5.6.1.13 ClearCase Integration

The Collaborator Eclipse Plug-in integrates with the IBM Rational ClearCase SCM Adapter Plug-in from <http://ibm.com>, or the open source ClearCase plugin for Eclipse from <http://sourceforge.net/projects/eclipse-ccase>. Note - the Collaborator Eclipse Plug-in ClearCase integration requires that the ClearCase cleartool be installed.

Adding ClearCase files to a Review

Files managed by ClearCase can be uploaded to the Collaborator Server by [Adding Files to a Review](#)⁴⁸⁸.

Supported Versions

The Collaborator Eclipse Plug-in supports versions through ClearCase 8.x.

The Collaborator Eclipse Plug-in supports *only* ClearCase Remote Client (CCRC) v.8.x.

5.6.1.14 CVS Integration

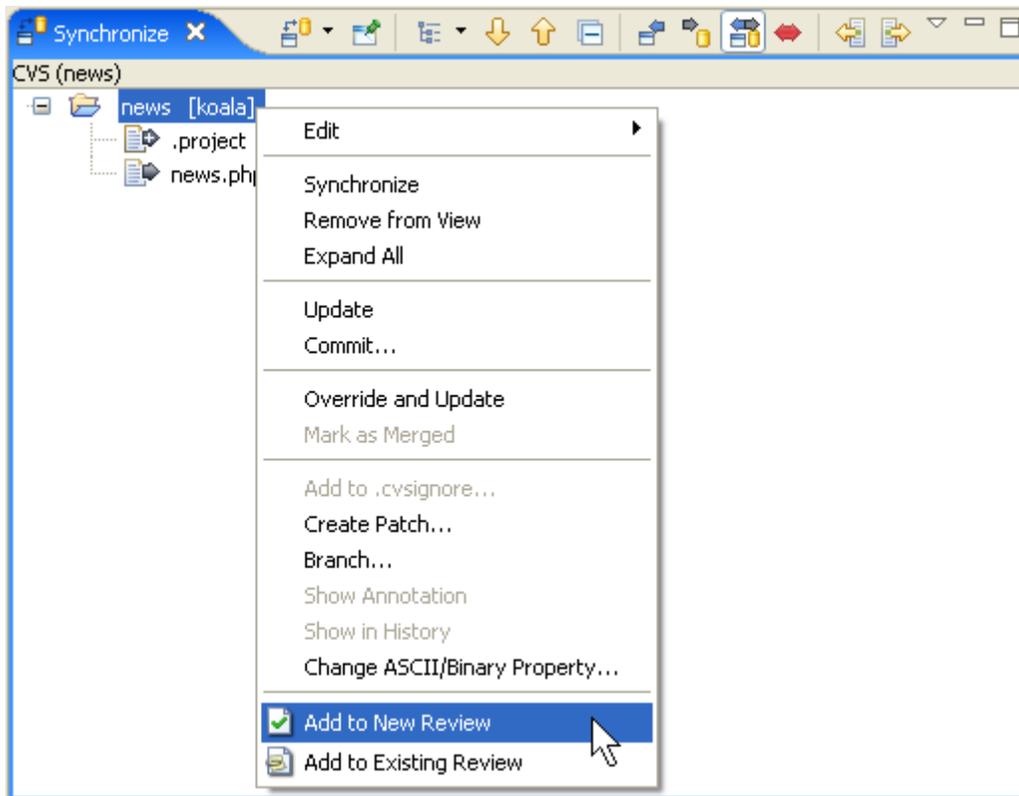
The Collaborator Eclipse Plug-in integrates with the CVS Eclipse Plug-in from <http://eclipse.org>. (The CVS plug-in usually comes bundled with the base Eclipse install.)

Adding CVS files to a Review

Files managed by CVS can be uploaded to the Collaborator Server by [Adding Files to a Review](#)⁴⁸⁸.

Adding CVS files to a Review from the Synchronize View

Files managed by CVS can also be added to a review from the **Synchronize** view. Right-click on any projects, folders, or files in the **Synchronize** view and select either **Add to New Review** or **Add to Existing Review**.



The [Add to Review Wizard](#) ⁴⁸⁴ will launch with the selected files.

5.6.1.15 Git Integration

With the Collaborator Eclipse Plug-in, you can add project files, files from Git commits and repository branches to a review directly from the Eclipse IDE. This topic explains how you can do this.

Requirements

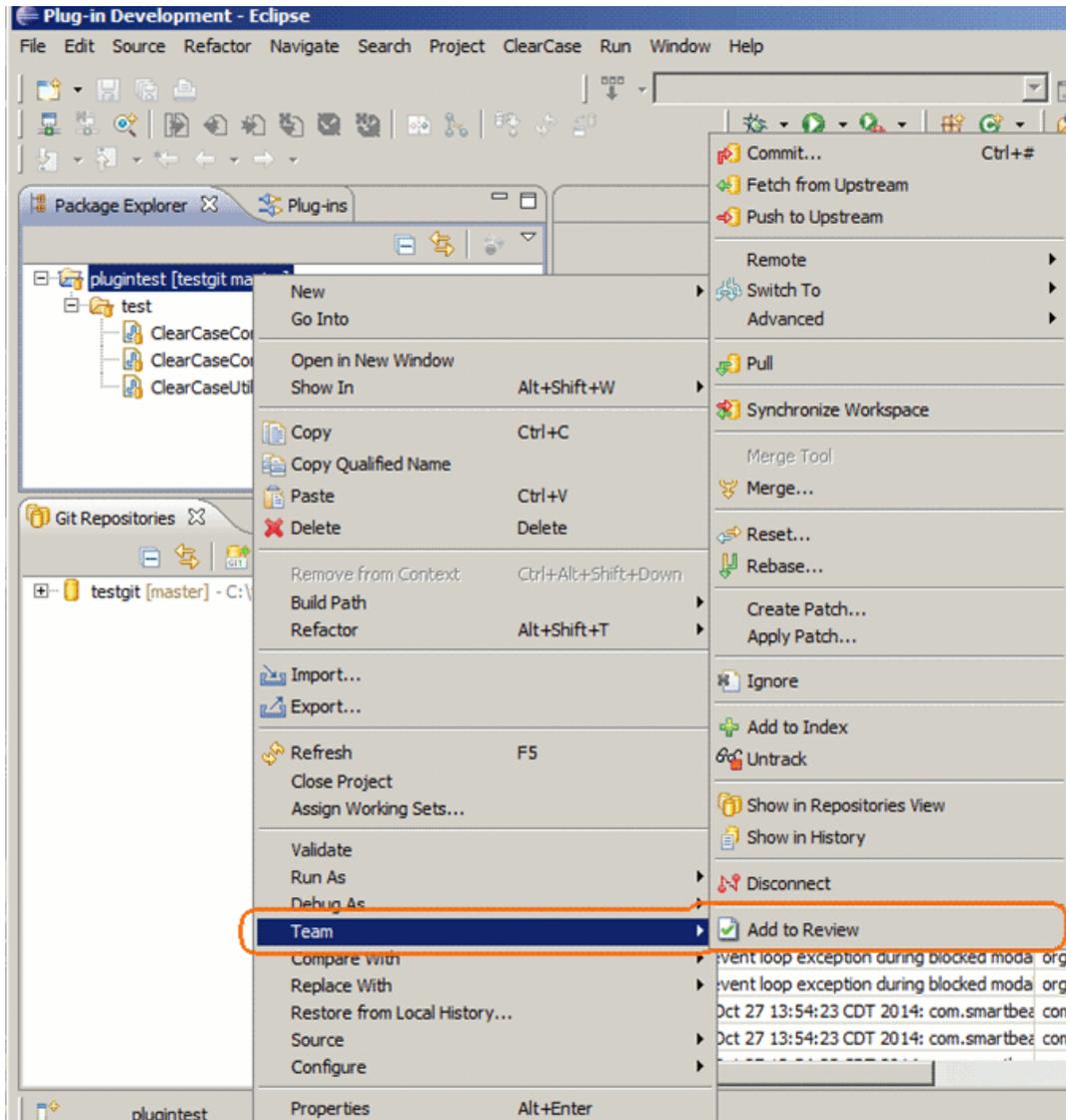
To integrate with Git and Eclipse, Collaborator's Eclipse Plug-in requires that the EGit plug-in to be installed in your Eclipse IDE. The EGit plug-in typically comes bundled with the Eclipse package. For more information on it, see http://wiki.eclipse.org/EGit/User_Guide.

Add Git Files to a Review

To add your project's files to a review, follow these steps:

1. In Eclipse IDE, open the **Package Explorer** view.

2. Right-click your project or any of the project's files and select **Team | Add to Review** from the context menu:



This will invoke the [Add to Review](#)⁴⁸⁴ wizard.

3. In the wizard, you specify the review name, and the project files and auxiliary documents to be attached to the review.

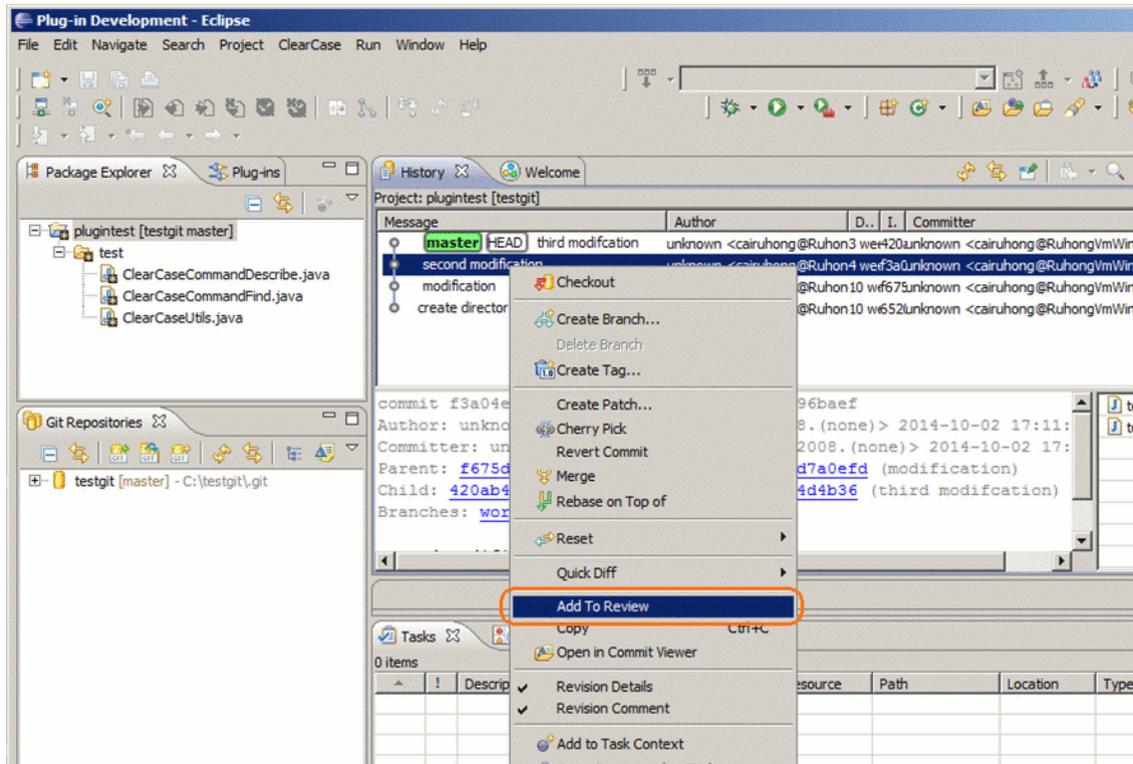
For detailed information on steps to be completed, see the [wizard description](#)⁴⁸⁴.

After you click Finish on the last page of the wizard, the wizard will send review data to the Collaborator server.

Adding Git Commits to a Review

Adding a Git commit to a review means including copies of *all* the files of this commit to the review. Follow these steps:

1. In Eclipse IDE, open the **History** view. It lists Git commits.
2. In the History view, right-click a commit and choose **Add to Review** from the context menu:

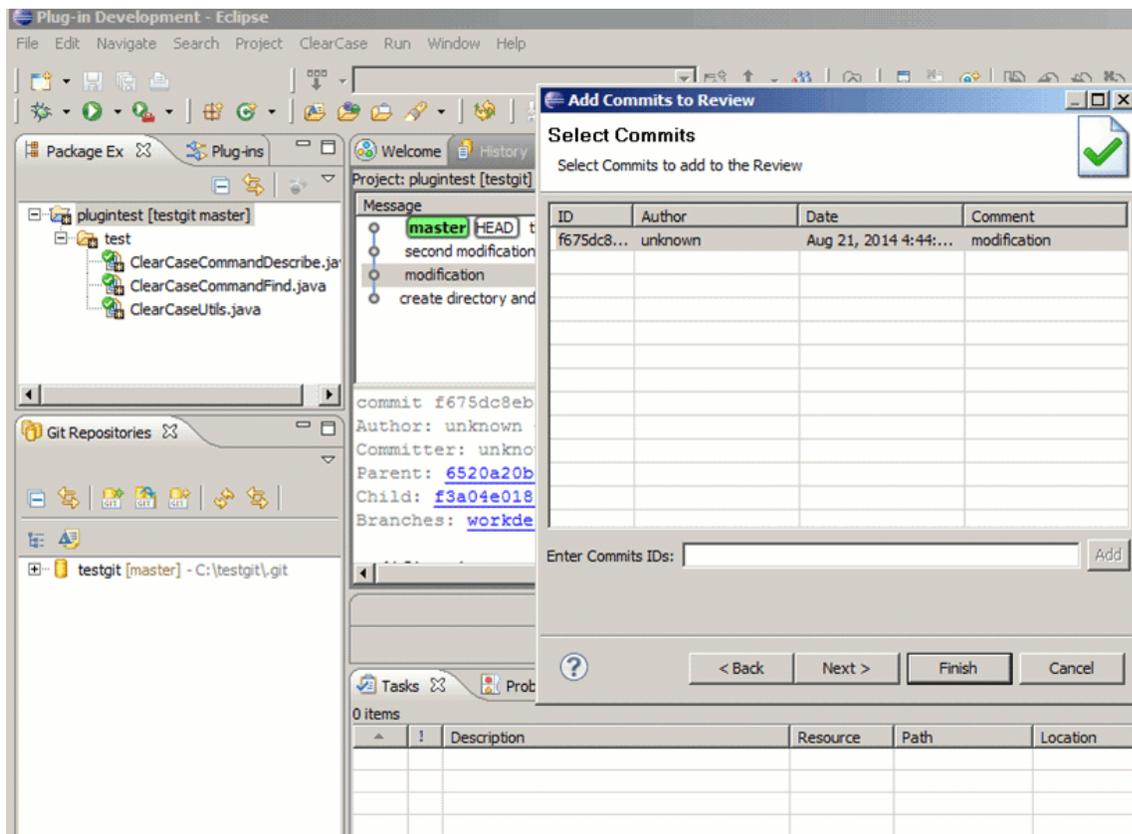


This will invoke the [Add to Review](#)⁴⁸⁴ wizard.

Known issue: In the Indigo version of the Eclipse IDE, the "Add to Review" item is present in the context menu only when you invoke it for the first time. Later, it is hidden from the menu. To solve the problem re-open the History view.

3. On the first page of the Add to Review wizard, you can select the commits, whose files the review will include.

By default, this page contains only the commit that you selected in the History view. To add more commits to the list, type the commit identifier into the **Enter Commit IDs** text box and click **Add**.



Click **Next** to continue.

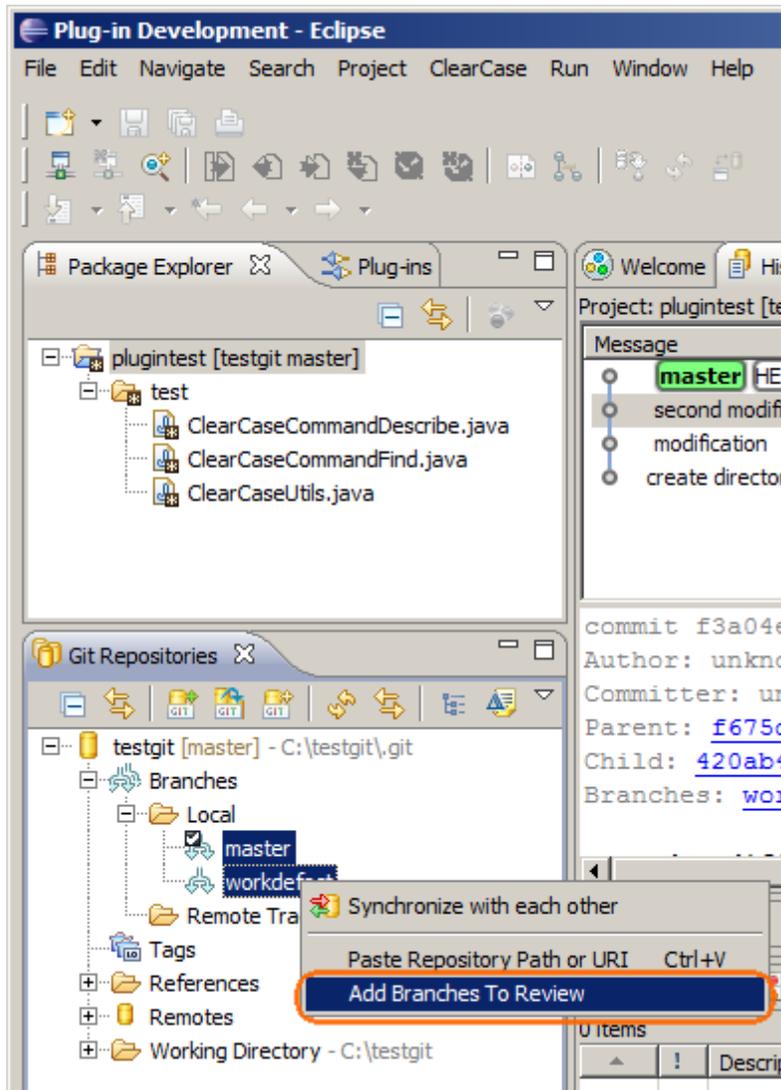
4. On the subsequent pages of the wizard, you can specify the review name and auxiliary files to be included into the review.

After you go through all the pages of the wizard, it will upload the review data to the Collaborator server.

Adding Files From Different Git Branches to a Review

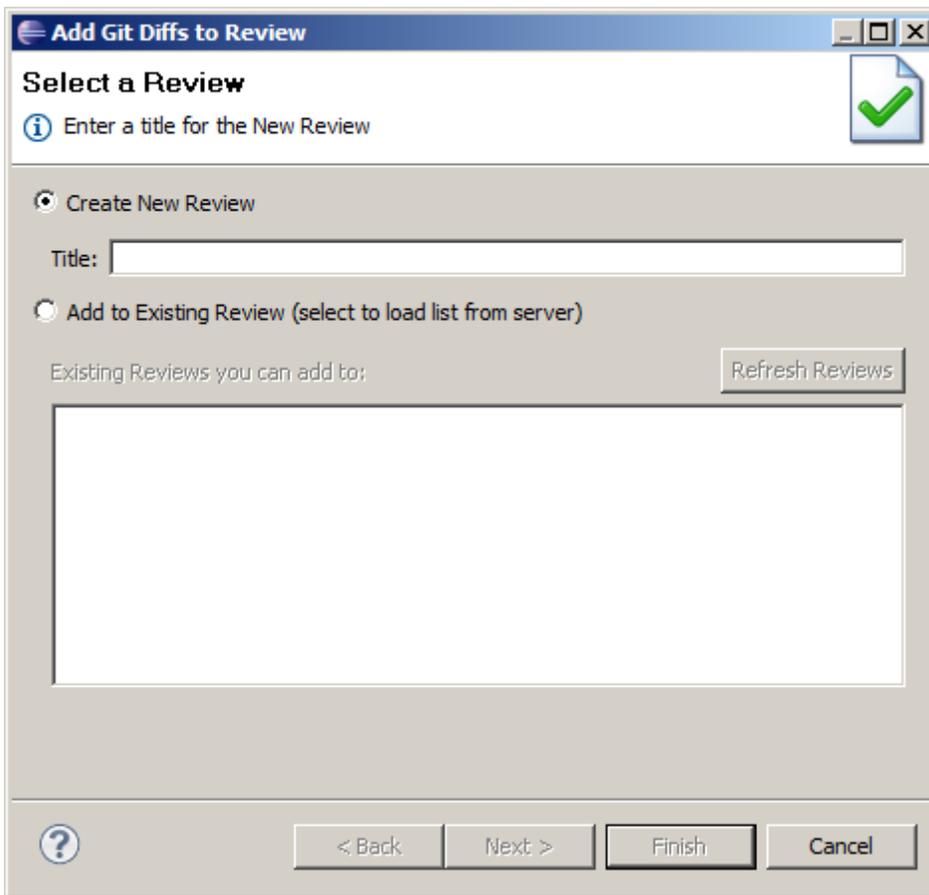
The difference between two branches is in the committed files and the number of commits. Adding "differences" to a review means adding copies of *all* the files of *all* "different" commits to the review. Follow these steps:

1. In Eclipse IDE, switch to the **Git Repositories** view. It displays the contents of your Git repository.
2. In the Get Repositories view, select the the desired branches.
3. Right-click the selection and choose **Add Branches to Review** from the context menu:

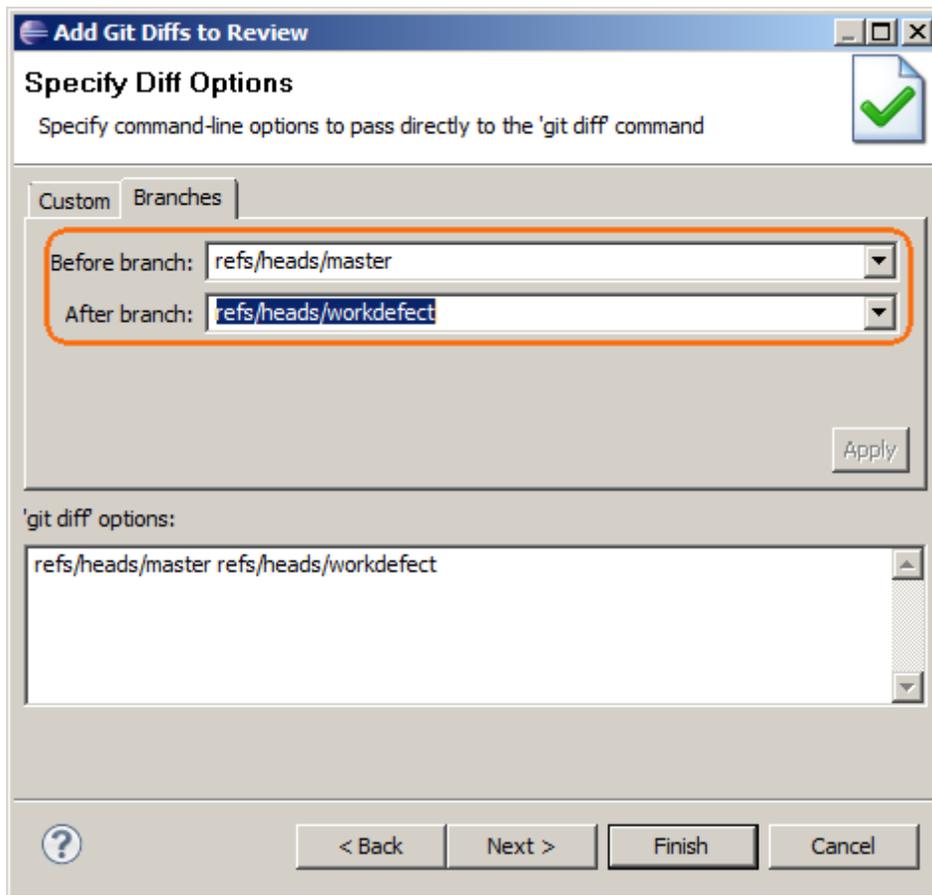


This will invoke the Add Git Diffs to Review wizard.

4. In the wizard, specify the review name --



-- and then select the branches to be passed to the `git diff` command (the Collaborator Eclipse Plug-in calls this command to determine the files to be added to the review):



The *before* and *after* are just Collaborator's terms to differentiate the branches. We suppose that one of these branches matches the original, or main, branch of your repository, and another branch contain the files that you modified while working on some feature.

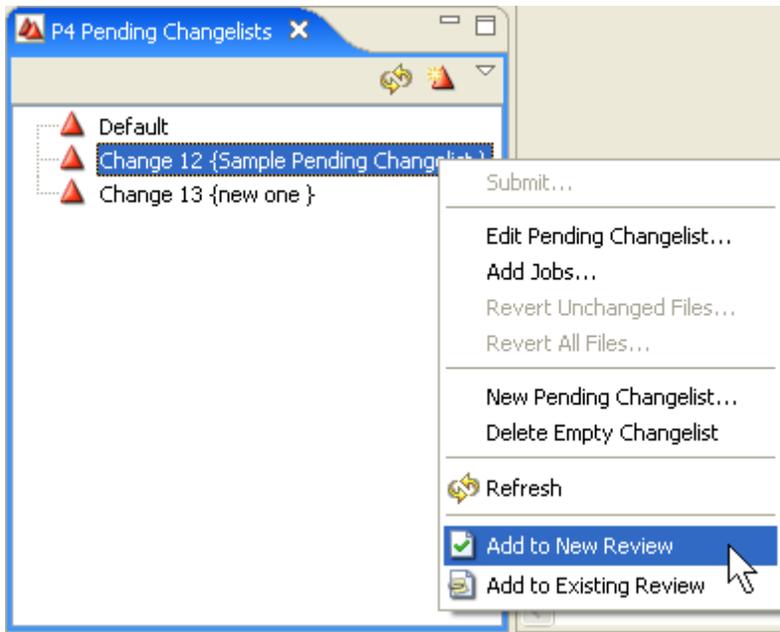
5. Go through other pages of the wizard to complete the review creation.

5.6.1.16 Perforce Integration

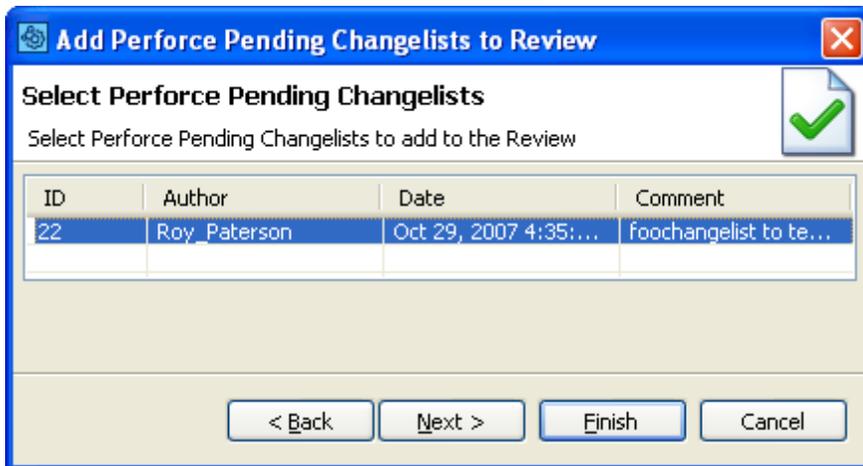
The Collaborator Eclipse Plug-in integrates with the Perforce using the Eclipse (P4Eclipse) Plug-in from <https://www.perforce.com/plugins-integrations/eclipse-plugin>.

Adding a Pending Changelist to a Review

Right-click on one or more Pending Changelists in the P4 Pending Changelists view and select **Add to New Review** or **Add to Existing Review**.



Clicking one of the **Add to Review** items will launch the **Add to Review Wizard** ⁴⁸⁴. The wizard will include a page that shows the Pending Changelists you selected, allowing you to select exactly which ones you want to upload:

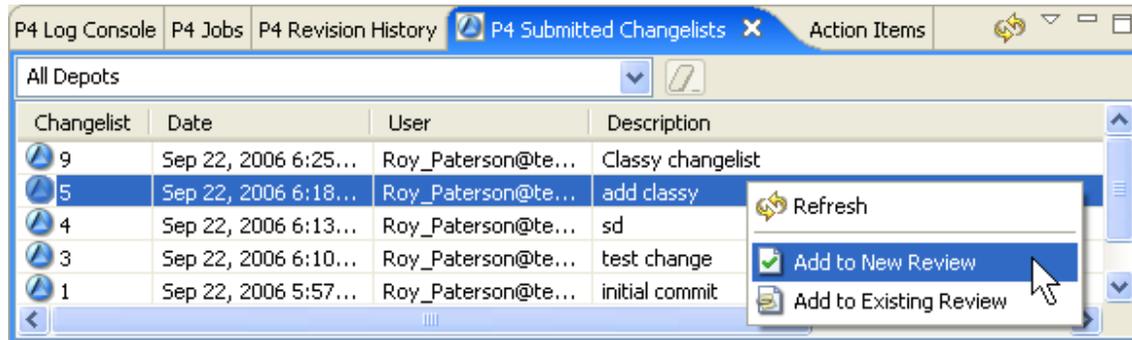


Any Pending Changelists you selected specifically will appear here. You may select more or fewer Pending Changelists than you originally selected.

Finishing the **Add to Review Wizard** ⁴⁸⁴ will upload your Pending Changelists to the Collaborator Server.

Adding Submitted Changelists to a Review

Right-click on one or more Submitted Changelists in the P4 Submitted Changelists view and select **Add to New Review** or **Add to Existing Review**.



Clicking one of the Add to Review items will launch the [Add to Review Wizard](#)^[484]. The wizard will include a page that shows the Submitted Changelists you selected, allowing you to select exactly which ones you want to upload:



Any Submitted Changelists you selected specifically will appear here. You may select more or fewer Submitted Changelists than you originally selected.

Finishing the [Add to Review Wizard](#)^[484] will upload the Submitted Changelists to the Collaborator Server.

5.6.1.17 Subversion Integration

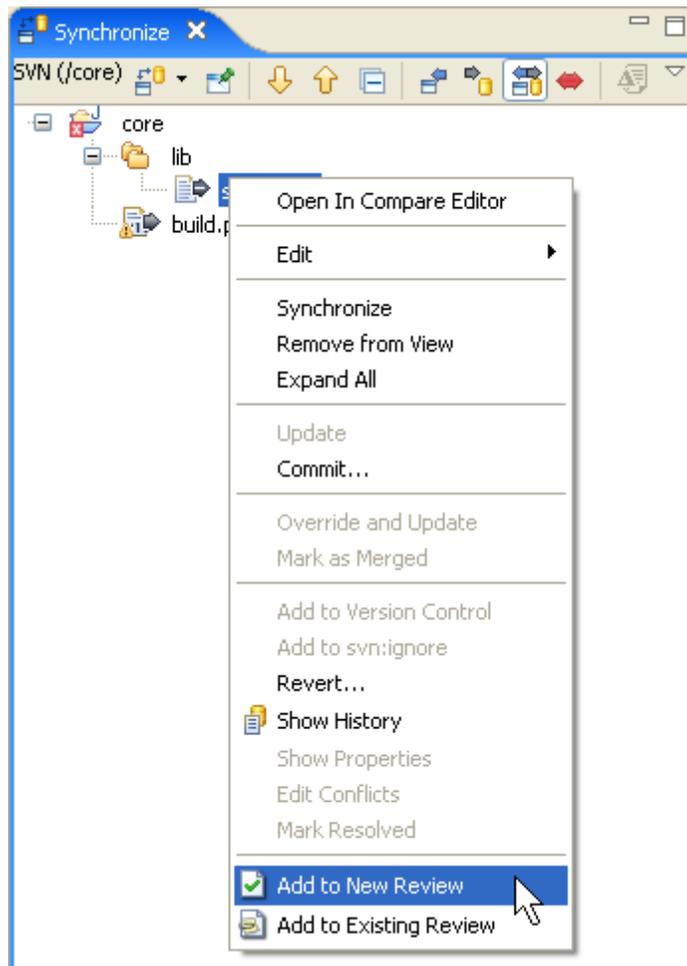
The Collaborator Eclipse Plug-in integrates with the [Subclipse](#) and [Subversive](#) Subversion Plug-ins. Currently, Collaborator Eclipse Plug-in supports Subclipse versions 1.4.x - 1.6.x and Subversive 4.x (SVN Connector 6.x).

Adding Subversion files to a Review

Files managed by Subversion can be uploaded to the Collaborator Server by [Adding Files to a Review](#)^[488].

Adding Subversion files to a Review from the Synchronize View

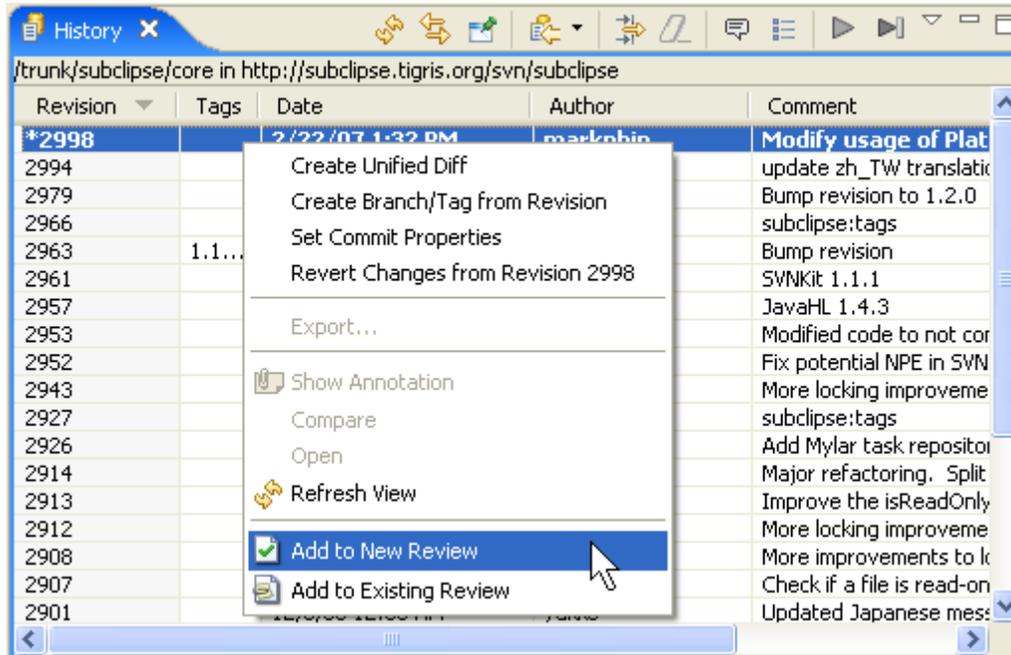
Files managed by Subversion can also be added to a review from the [Synchronize](#) view. Right-click on any projects, folders, or files in the [Synchronize](#) view and select [Add to Review](#).



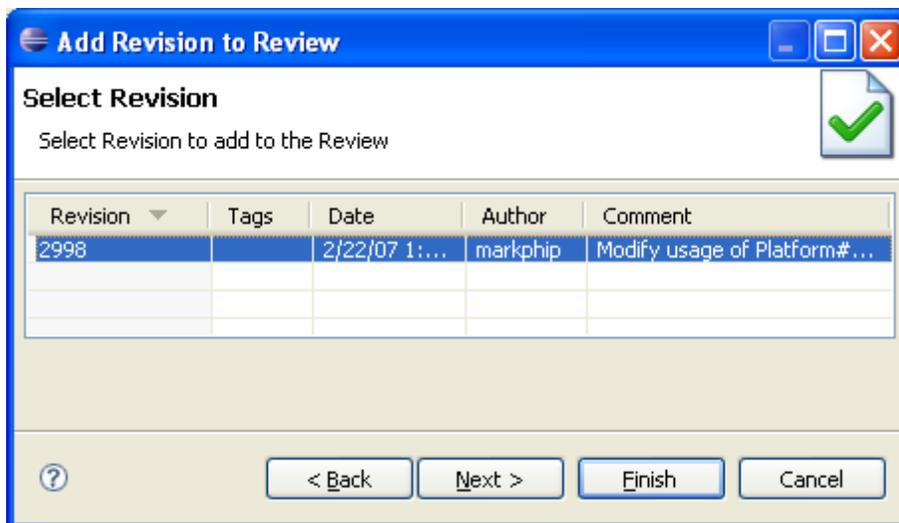
The [Add to Review Wizard](#)^[484] will launch with the selected files.

Adding a Subversion Revision to a Review

Revisions are shown in the History view. Right-click on a Revision and select **Add to Review**.



Clicking **Add to Review** will launch the [Add to Review Wizard](#)⁴⁸⁴. The wizard will include a page that shows the Revision you selected:



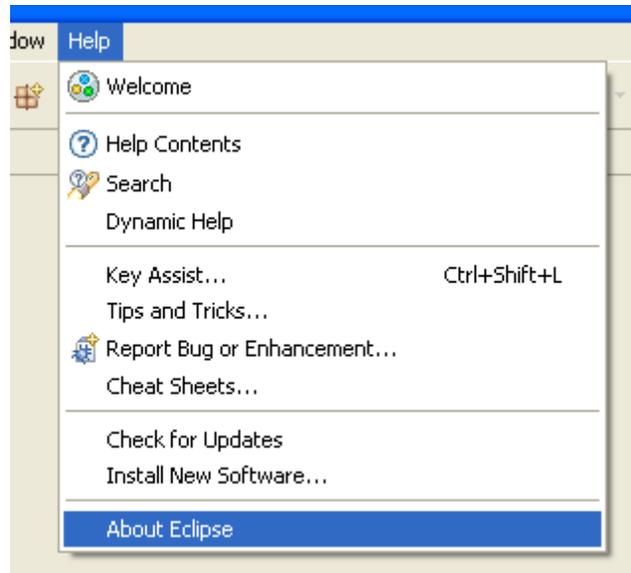
The Revision you selected specifically will appear here. You may select more or fewer Revisions than you originally selected.

Finishing the Add to Review Wizard ⁴⁸⁴ will upload the Revision to the Collaborator Server.

5.6.1.18 Troubleshooting

If you run across any issues or problems, send the error log along with your question to Support ⁴⁸⁵.

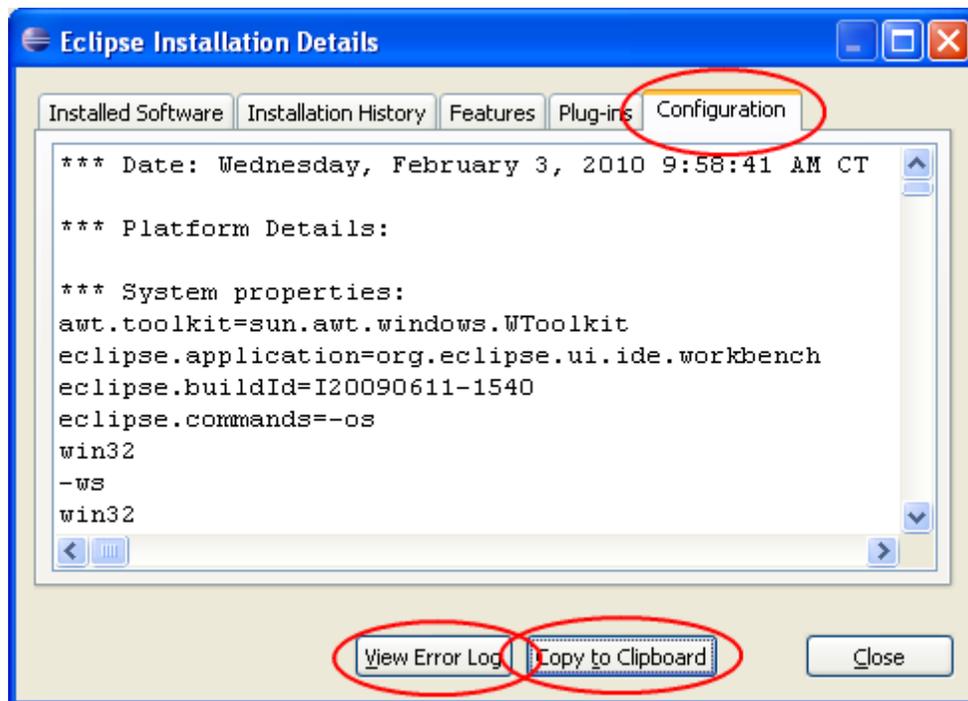
To get the error log, go to "Help" -> "About Eclipse".



Under the Help menu, click on "About"



Then, click on "Installation Details".



Click the "Configuration" tab. Click the "Copy to Clipboard" button and save it in a file. Then click "View Error log" and save that information in a file as well. Send both files to [Support](#), along with a description of what you were trying to do when you encountered the error.

5.6.2 Visual Studio Extension

This chapter describes Collaborator extension for Microsoft Visual Studio, and includes the following sections:

- [Overview](#)
- [Installing & Removing the Extension](#)
- [Configuring](#)
- [Collaborator View \(Review Explorer\)](#)
- [Creating Reviews](#)
- [Review Summary Screen](#)
- [Code Viewer and Diff Viewer](#)

5.6.2.1 Visual Studio Extension Overview

The SmartBear Collaborator extension for Microsoft Visual Studio provides integration between Microsoft Visual Studio and Collaborator. It allows you to create and participate in Collaborator

reviews directly from within the Visual Studio IDE.

Get Started

1. [Download and install the extension](#)⁵⁰⁶ (the extension uses a stand-alone installer).
2. Select **Collaborator | Show Tool Window** from the main menu of Visual Studio to open the [Collaborator View](#)⁵¹⁶ panel.
3. If the extension is not [configured](#)⁵⁰⁷ yet, it will invoke a Getting Started wizard suggesting to configure connection to Collaborator server and environment settings.

How the Integration Works

The extension adds a number of panels, menus and settings to the Visual Studio. The "entry point" is the [Collaborator](#)⁵¹⁶ view:

The screenshot shows the Visual Studio IDE with the Collaborator extension integrated. The main window displays a review summary for "Review #2: (added) COLLAB-3320. Rich text comments". The interface includes a progress bar with stages: PLANNING, ANNOTATING, INSPECTION (active), and COMPLETED. Below the progress bar, there are statistics: 2 Participant, 0 Files, 0 Chats, and 0 Defects. The review title is "(added) COLLAB-3320. Rich text comments", the role is "Reviewer", and it was created on Thursday, March 21, 2019 at 12:20:38 PM. The group is "All Users" and the template is "Default". The completed on date is "[N/A]" and the restrict access is "Anyone". The overview section is empty. Below the overview, there is a "Participants" section with a table listing participants: Clive Sinclair (Author, Waiting) and John Smith (Reviewer, Active). The Collaborator tool window on the right shows a list of reviews: Review #2 (Perform, Clive Sinclair, Reviewer), Review #1 (Finish creating, [UNKNOWN], My Role), and Review #3 (Finish creating, John Smith, Author). The bottom of the tool window shows the user is logged as "jsmith" on server "http://collabserver:8080".

In this panel, you can view the reviews and invoke other panels and dialogs to perform all types of peer review tasks:

- Get information about [incoming and outgoing reviews](#) ^[516] on the specified Collaborator server.
- [Create reviews](#) ^[518] as an author.
- [Participate](#) ^[516] in someone else's reviews as a reviewer or observer.
- [Modify review details](#) ^[529], add or remove review participants, annotate, reject or cancel your reviews, communicate with other participants.
- [Inspect the review materials](#) ^[530].
- [Create comments and defects](#) ^[531].

Requirements

- Microsoft Visual Studio 2017, 2015 or 2013. The Community, Professional and Enterprise editions are supported.
- Collaborator Client on the computer, where you are going to installed the extension. The extension uses the Client to upload review materials to the server and to work with source controls.
- Collaborator Client must be properly configured to work with your source control system. See [GUI Client: SCM Configuration](#) ^[437] and [Version Control Integration](#) ^[540].
- Collaborator Server 10.0 and later.

Known Issues

- Since the extension checks the Collaborator server periodically, it may take up to 2 minutes to retrieve information about newly created user from the server.
- Currently, the default SCM configuration chosen on the SCM page of the Visual Studio Extension's [Options dialog](#) ^[507] does not synchronize with the SCM system specified via the ccollab set scm command. Avoid calling SCM commands simultaneously from the Visual Studio Extension and from the Command-Line Client.

Troubleshooting

If you run across any issues or problems, send the error log along with your question to [Support](#) ^[32].

The extension's error log resides at `%userprofile%\smartbear\vsext\log\vsext.log`

5.6.2.2 Installing and Removing

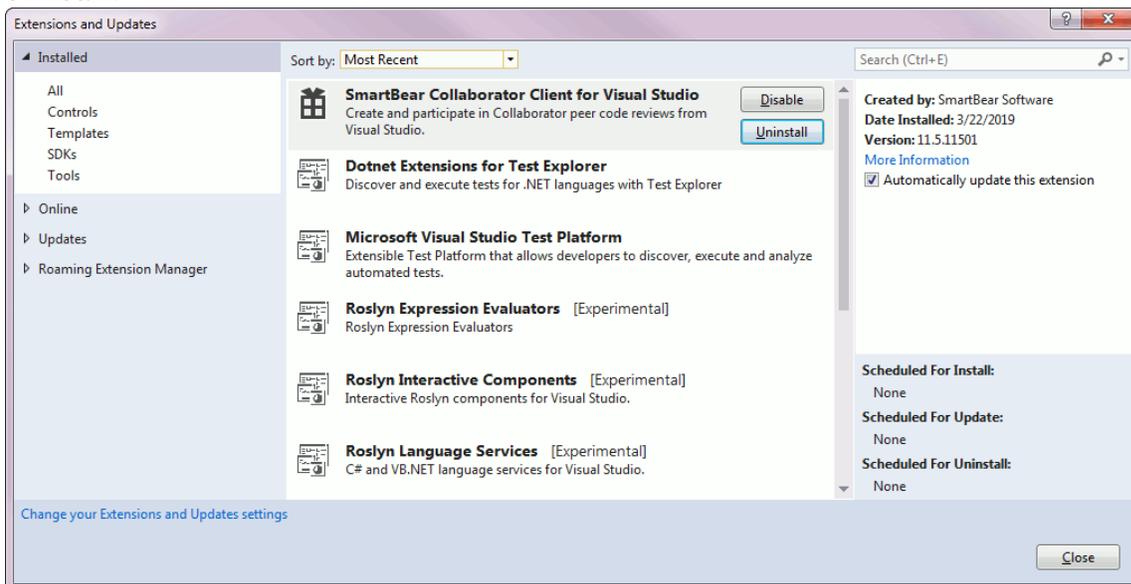
Installing the Extension

1. Download the Collaborator Visual Studio Extension from our website:
<http://support.smartbear.com/downloads/collaborator/>
2. Unpack file from the downloaded .zip archive and run the CollaboratorVSExtension.vsix package.
3. In the VSIX Installer, choose the desired Visual Studio version and press **Install**.

IMPORTANT: After installing the extension, you need to [configure its settings](#)⁵⁰⁷ before the first use. Also, we recommend to [configure SCM settings](#)⁴³⁷ in the Collaborator Client so that it can connect to your source control repository.

Removing the Extension

1. Start Visual Studio.
2. Select **Tools > Extensions and Updates** from the main menu.
3. In the ensuing dialog, find the **SmartBear Collaborator for Visual Studio** extension and press **Uninstall**.

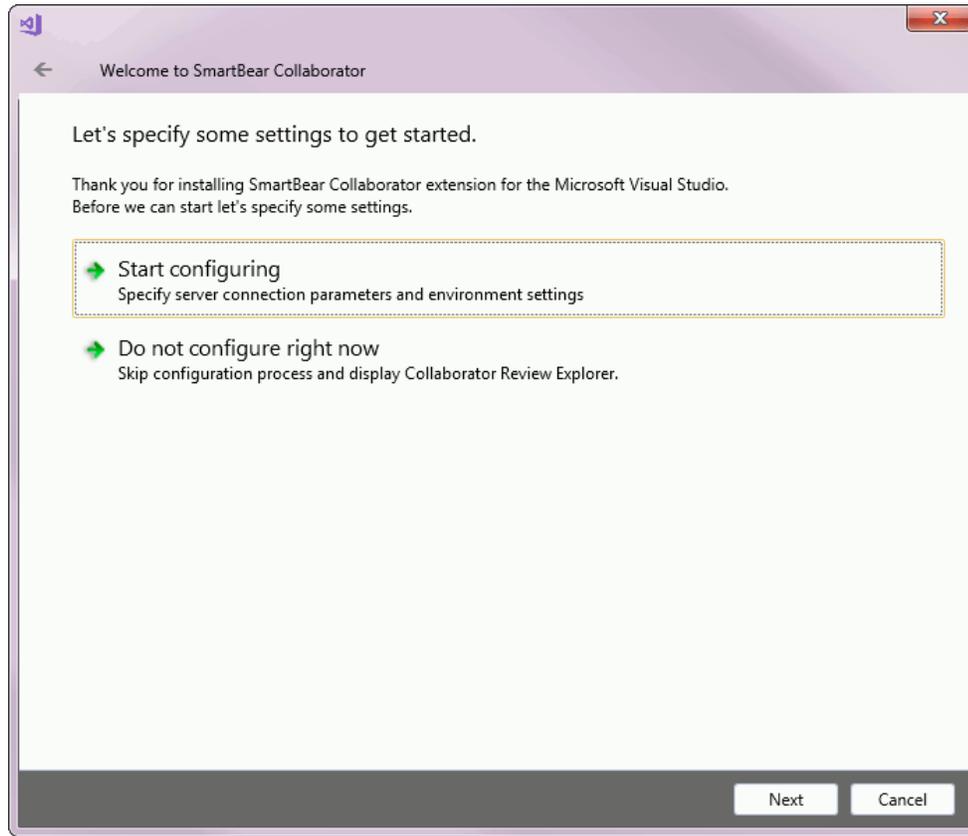


4. Restart Visual Studio to finalize the uninstallation.

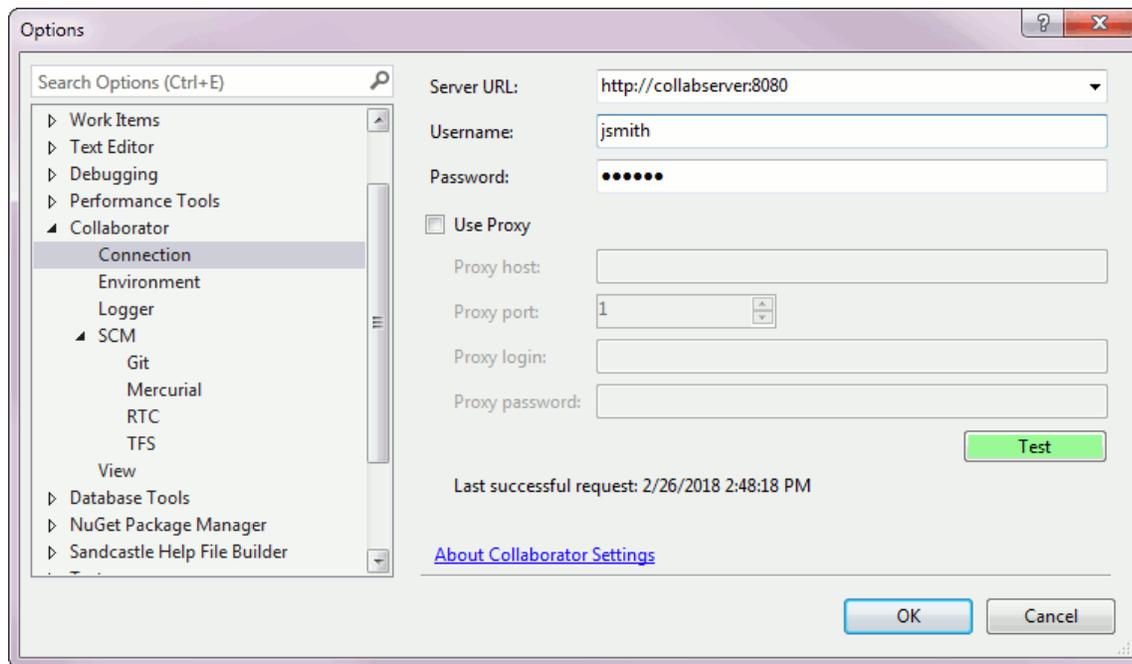
5.6.2.3 Configuring

Before using the Collaborator extension for Visual Studio, you must configure it.

When you open the [Collaborator View](#)⁵¹⁶ window and the extension is not configured yet, it will invoke a Getting Started wizard suggesting to configure connection to Collaborator server and environment settings.



To change the extension settings afterwards (or if you have skipped the wizard), select **Tools | Options** from the main menu of Visual Studio and find **Collaborator** in the tree of the left:



The Collaborator extension includes the following settings:

Connection (required)

Server URL

Denotes which Collaborator server to use. The Server URL must include the correct port number and path if applicable.

If your server uses HTTPS, you may need to install its certificate as [described below](#)^[511].

Username and Password

Specifies user credentials. The Username and Password are the same as you use when [logging into the web server](#)^[289].

It is not recommended to use empty password.

Use Proxy

Enable if you connect to the Internet via proxy server.

If you use proxy and want to connect to a Collaborator server that is deployed on your local machine, then specify **Server URL** in the "Machine_Name:8080" format rather than "localhost:8080" or "127.0.0.1:8080" formats.

Proxy host and Proxy port

The URL of a proxy server and its port number.

Proxy login and Proxy password

The login and password, if proxy server requires authentication.

Click **Test** to check if you can connect to the specified Collaborator server with the user name and password entered.

Environment (required)**Path to ccollab.exe**

The fully-qualified name of the Collaborator Command-Line Client executable.

Local Cache Folder

The fully-qualified path to a temporary folder, where the extension will keep review materials obtained from the server.

Logger (optional)

This section controls what information will be displayed in the Visual Studio's Output window and in the debug log. You can toggle whether to display or not the information about exceptions, errors, warnings, debug messages or general information messages.

SCM (required)

Visual Studio extension share SCM configurations with GUI Client and command-line client. In this section you must select which of SCM configurations the extension will use to upload review materials. Optionally, in the subsections of this section, you may create new or modify existing SCM configurations.

Use Solution Path

Specifies whether to treat path of current open solution as local SCM folder when uploading local changes.

Configurations

Lists the available configurations and displays their parameters.

To specify which of SCM configurations the extension will use to upload review materials, select a configuration in the drop-down list and press **Set as Default**.

To create a new SCM configuration, specify its parameters and press **Add**.

To modify an existing SCM configuration, select it in the Configuration drop-down list, change parameters and press **Save**. For TFS configurations, you can also press **Test Connection** to verify the connection parameters.

To delete an existing SCM configuration, select it in the Configuration drop-down list and press **Remove**.

Git

Configuration	Lists the available Git configurations and displays their parameters.
Repository Path	Specifies the path of local source code location.
Git Exe	Specifies the full path to the 'git' command line client.

Mercurial

Configuration	Lists the available Mercurial configurations and displays their parameters.
Repository Path	Specifies the path of local source code location.
Mercurial Exe	Specifies the full path to the 'mercurial (hg)' command line client.

RTC (To use RTC integration from Visual Studio Extension, you need to [configure Collaborator server and client and RTC server](#)⁽⁶²⁷⁾)

Team Repository URI	The URI of the repository to work with.
User name and Password	Specifies user credentials on the chosen team repository.

TFS

Configuration	Lists the available TFS configurations and displays their parameters.
Server URL	For self-hosted version of Team Foundation Server, specify the URL of Team Foundation Project Collection to work with.

For SaaS version of Team Foundation Server, specify the URL of your Visual Studio Team Services account (without project or collection names).

Local Path

Specifies the path of local source code location.

After specifying these values, you can click **Test Connection** verify if the TFS server is available. If you are connecting to this server for the first time, a Visual Studio sign-in prompt will be displayed.

View (optional)**Group conversations by lines**

Controls how Code Viewer and Diff Viewer display comments and defects.

If enabled, the [Conversations Pane](#)⁵³¹ displays comments and defects that relate to a particular line. Otherwise, it displays the entire list of comments and defects.

Configuring HTTPS Connection

When your Collaborator server uses HTTPS connection and its certificate cannot be automatically verified, or server uses a self-signed certificate, then you will need to install the certificate manually.

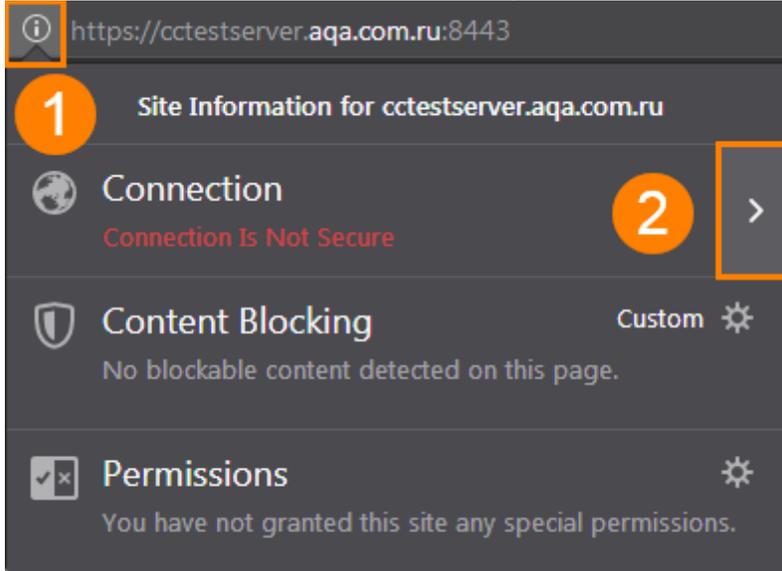
Note on self-signed certificates: You have to use certificate signed with Certificate Authority (CA). It can be any CA - even yourself. And you must install that CA certificate in trusted authorities. You cannot use self-signed certificate directly.

Obtaining Certificate

At first, you need to obtain the certificate from the Collaborator server administrator, or obtain it yourself as described below:

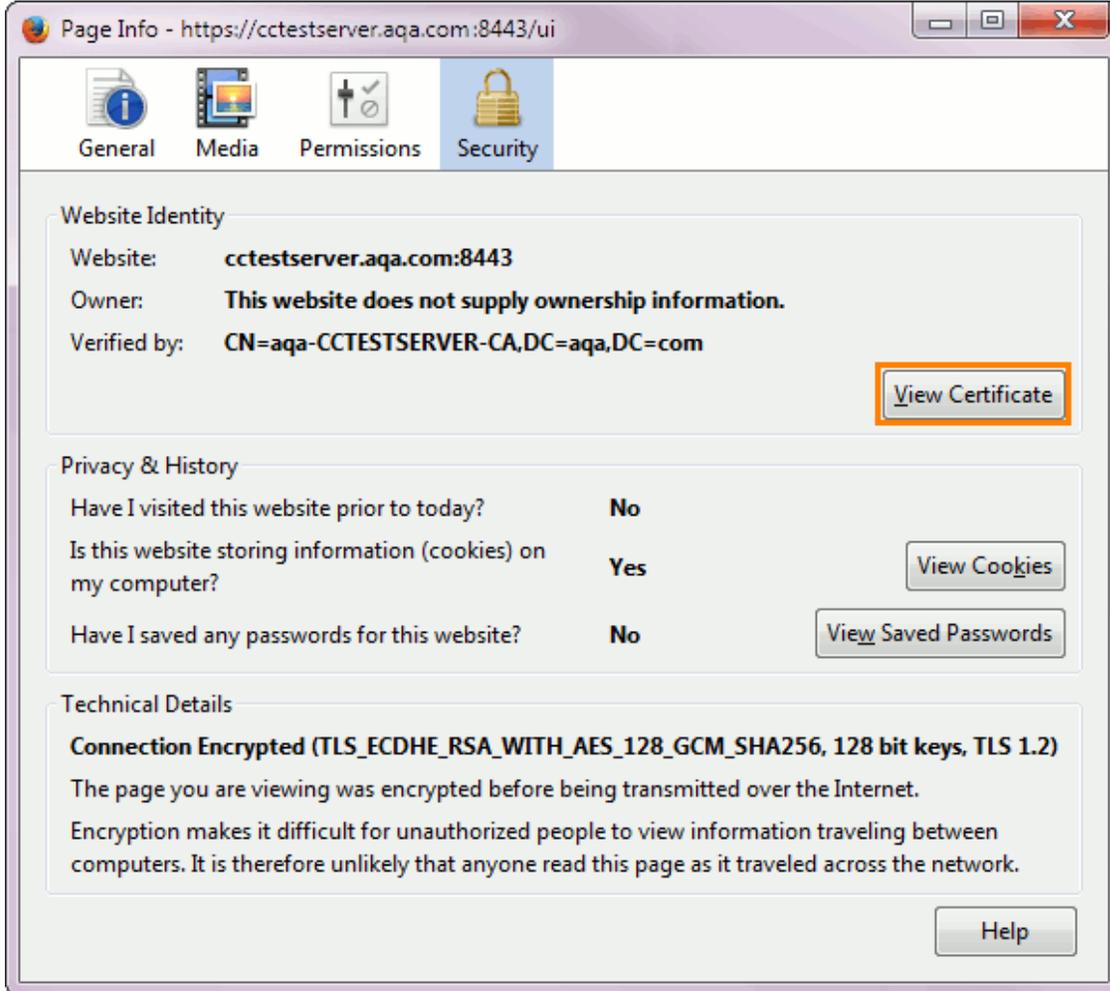
1. Launch Firefox browser and navigate to Web UI of your Collaborator server.

2. Click the info button to the left of a web page's address.



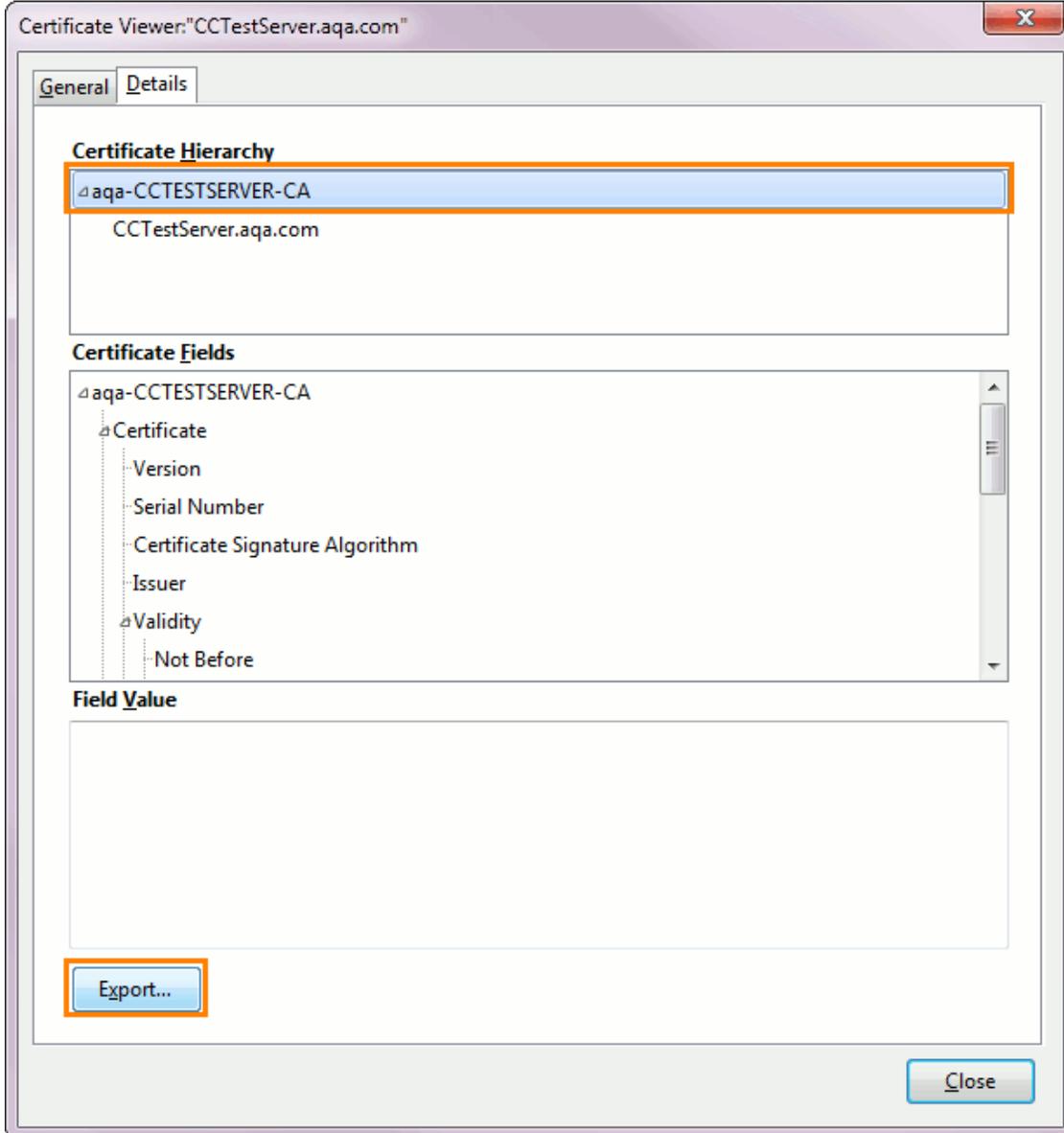
3. Click the **More Information** button in the next prompt. This will open the Page Info window.

4. Switch to the Security panel and click the **View Certificate** button.



5. In the ensuing Certificate Viewer dialog, switch to the Details tab.

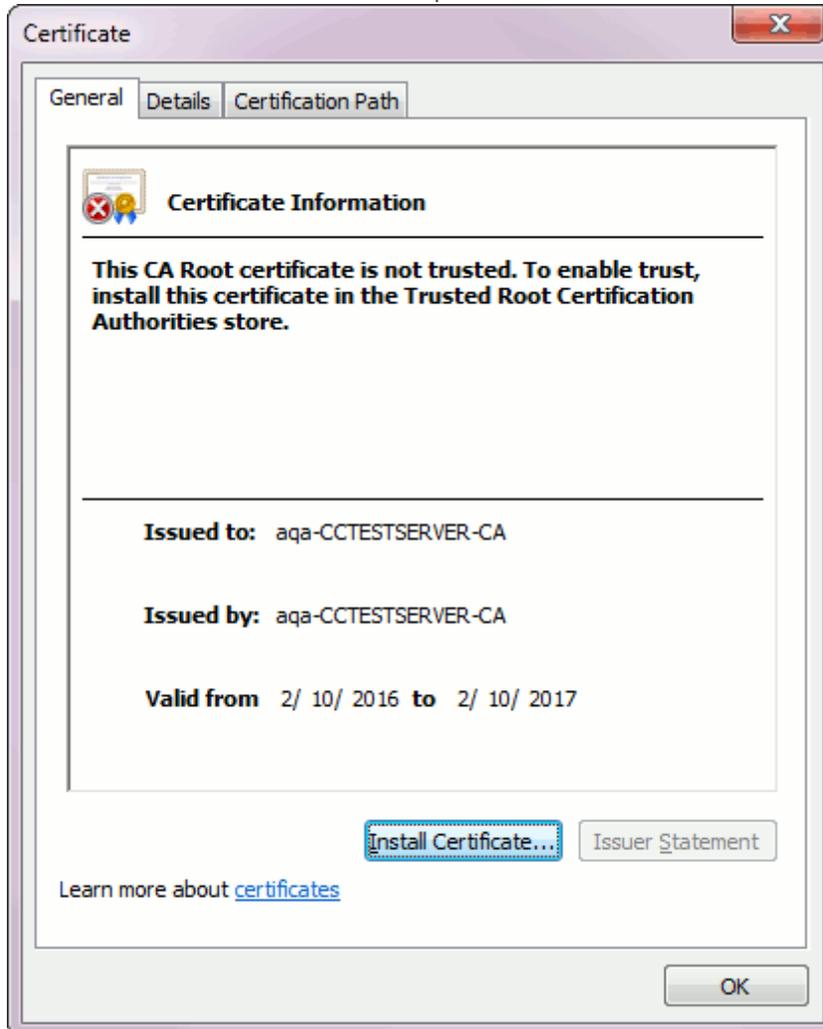
6. Select the topmost certificate in the hierarchy and click **Export** button.



7. Specify a path where to save the certificate in a standard Save File dialog.

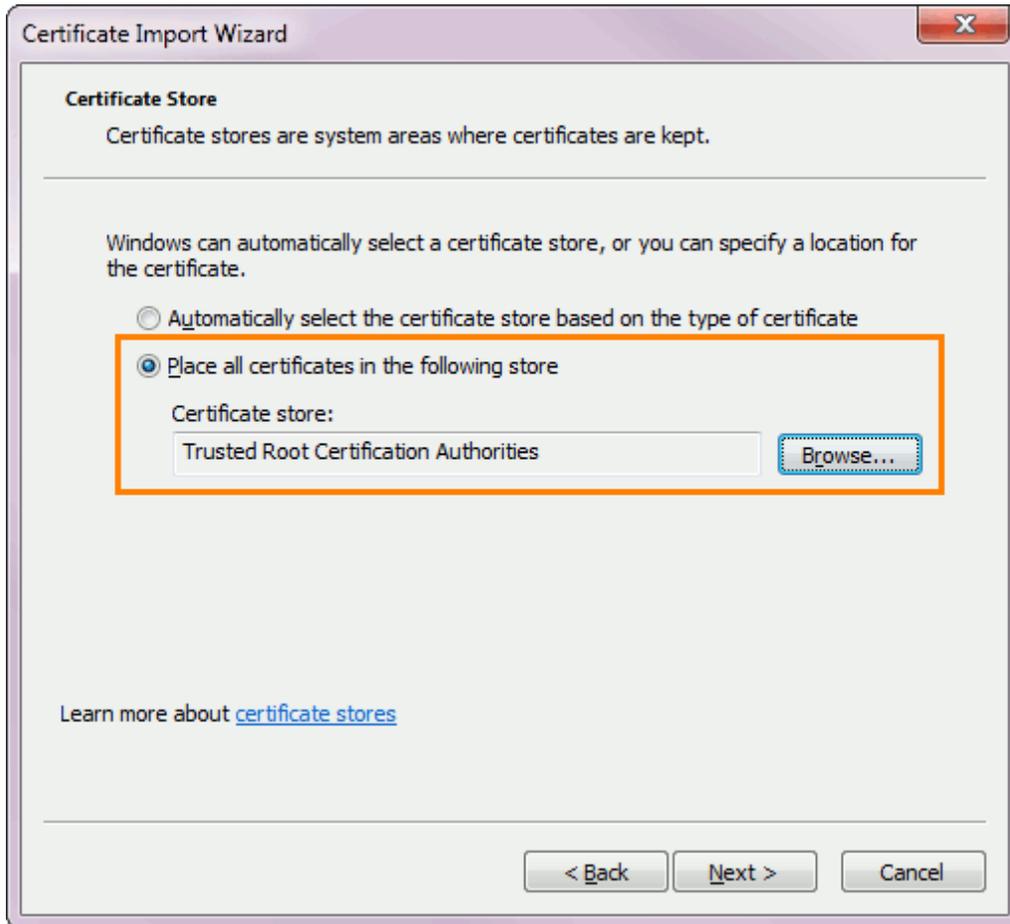
Installing Certificate

1. Double click the certificate. This will open the Certificate Information window.



2. Click **Install Certificate** button.
3. In the ensuing Import Certificate Wizard, click **Next** to proceed to the Certificate Store page.

4. Choose the "Place all certificates in the following store" option, click Browse and select the "Trusted Root Certificate Authorities" store.



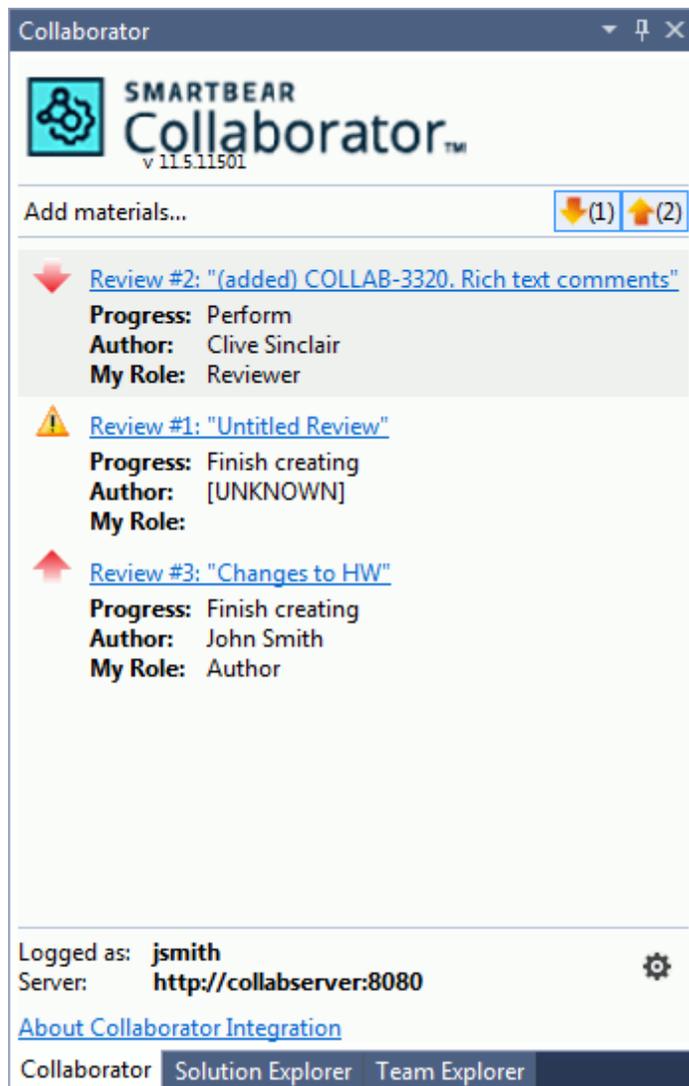
5. Click **Next** and **Finish**.
6. For self-signed certificates, a Security Warning will be displayed. Press **Yes** to confirm certificate installation.

Now Visual Studio Extension is properly configured for HTTPS connection.

5.6.2.4 Collaborator View

Collaborator Visual Studio extension adds a new window to Visual Studio IDE. The Collaborator View window shows current user name and server URL and lists the incoming and outgoing reviews on the specified Collaborator server. This window is analogous to the Home page with the [Action Items](#)^[307] list of [Web Client](#)^[287].

To display the window, select **Collaborator | Show Tool Window** from the main menu of Visual Studio.



From the Collaborator View window you can --

Create new reviews or upload materials to existing reviews

Click "Add materials" from the Collaborator View's toolbar. For detailed information, see [Creating Reviews](#)⁵¹⁸.

Open existing reviews

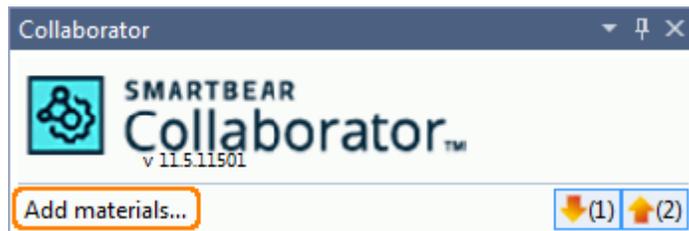
Click a review in the list and explore its details in the subsequent [Review Summary Screen](#)⁵²⁹.

Configure extension settings

Click the extension version number in the header, or the gear icon in footer. This will open the Options dialog with the [extension settings](#)^[507].

5.6.2.5 Creating Reviews

To create Collaborator from within Visual Studio IDE, use the **Collaborator | Add materials** main menu item, or the **Add materials** command in the toolbar of the [Collaborator View](#)^[516] in Visual Studio:



Requirements

Before using this command, we recommend that you [configure SCM settings](#)^[507] to let it connect to your source control repository. See also [Version Control Integration](#)^[540].

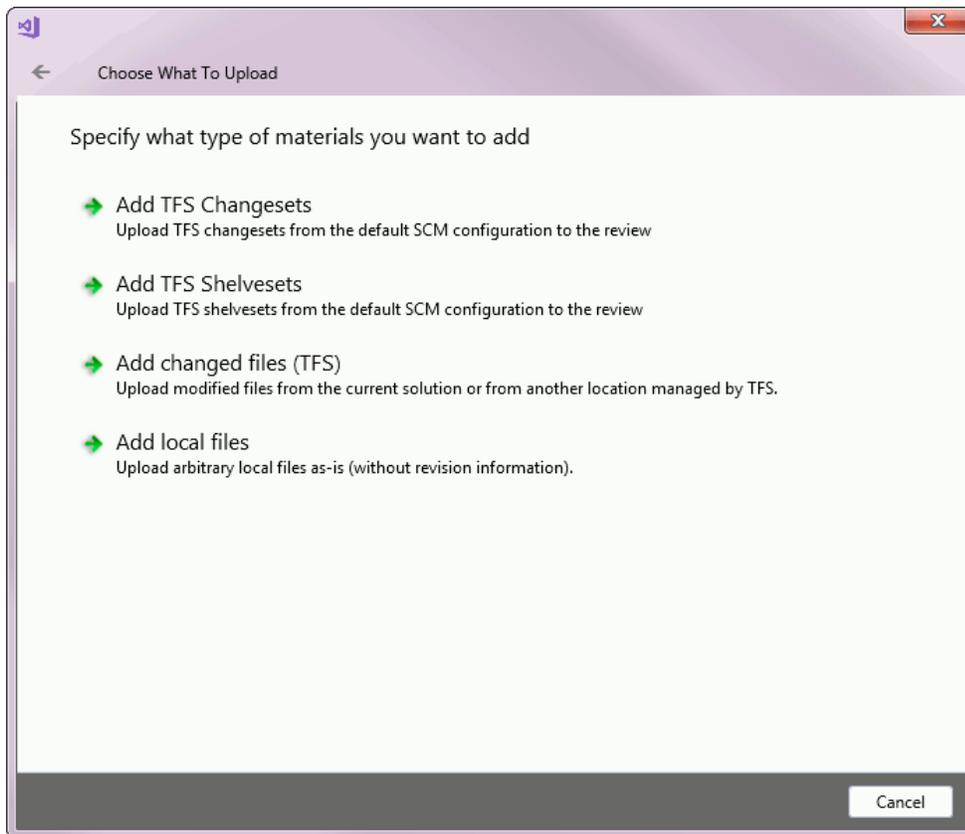
How It Works

The command invokes the Add to Review Wizard that will lead you through the review creation process.

1. Select Review Materials

At first, you should select what type of materials to upload. The number of available options would depend on what SCM configuration you have chosen as the default in the extension settings.

- **Add changelists/changesets/shelvesets** - Upload changes that have been submitted to source control repository. The created review will contain all files that belong to the specified **changelists**, **changesets** or **shelvesets** along with the history of changes between revisions.
- **Add changed files** - Upload upload pending changes (staged for, but not yet submitted to source control repository) from the current solution or from another location. The created review will contain the selected files along with the history of changes between the staged and the submitted revisions.
- **Add local files** - Upload arbitrary local files. The created review will contain only the selected files without their revision history.

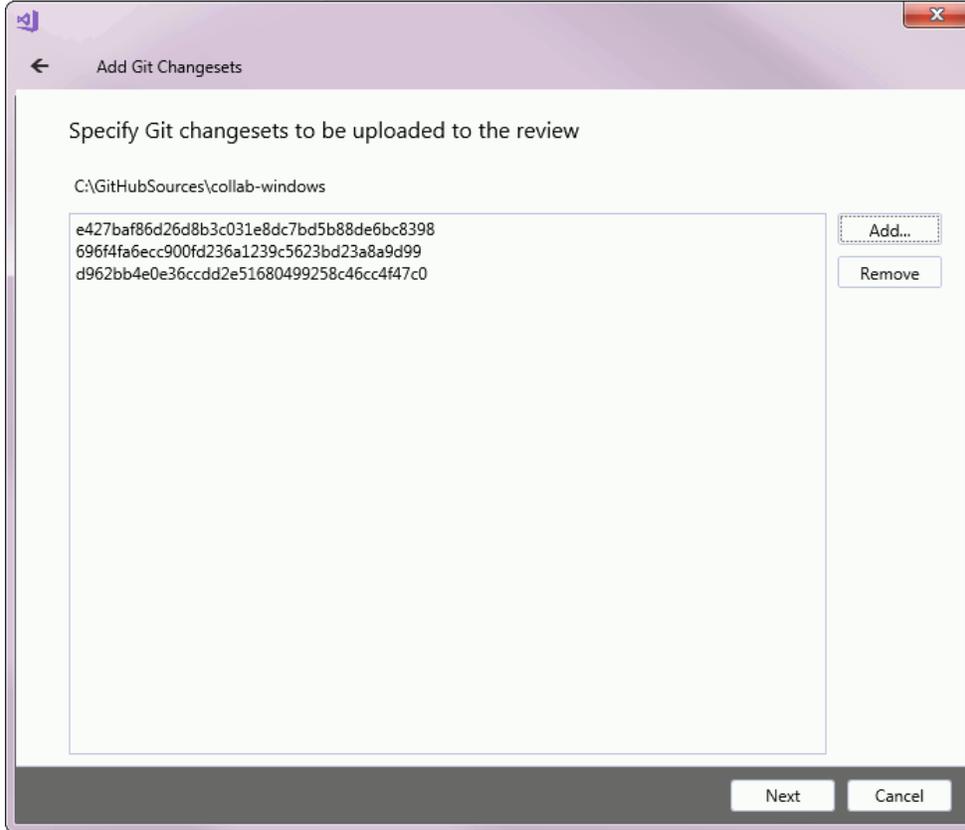


The next page lets you choose exactly which materials will be uploaded added to the review. This page looks different depending which materials you are adding to the review:

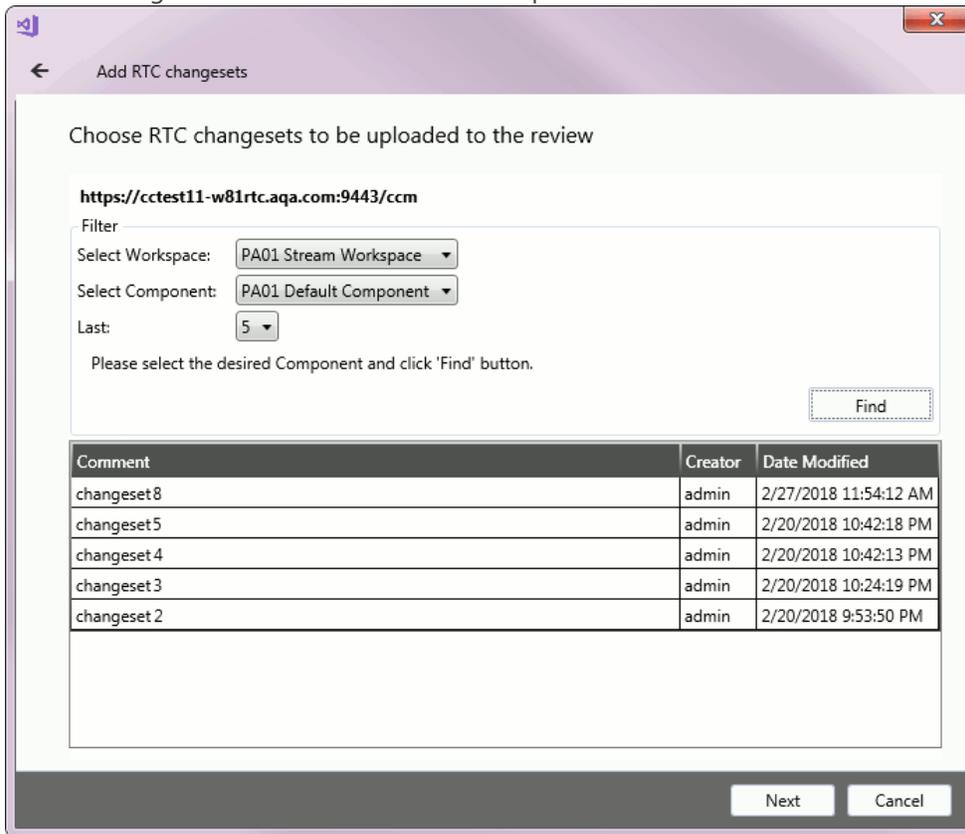
1.1 Uploading changelists/changesets/shelvesets

This page also depends on type of chosen SCM system and item.

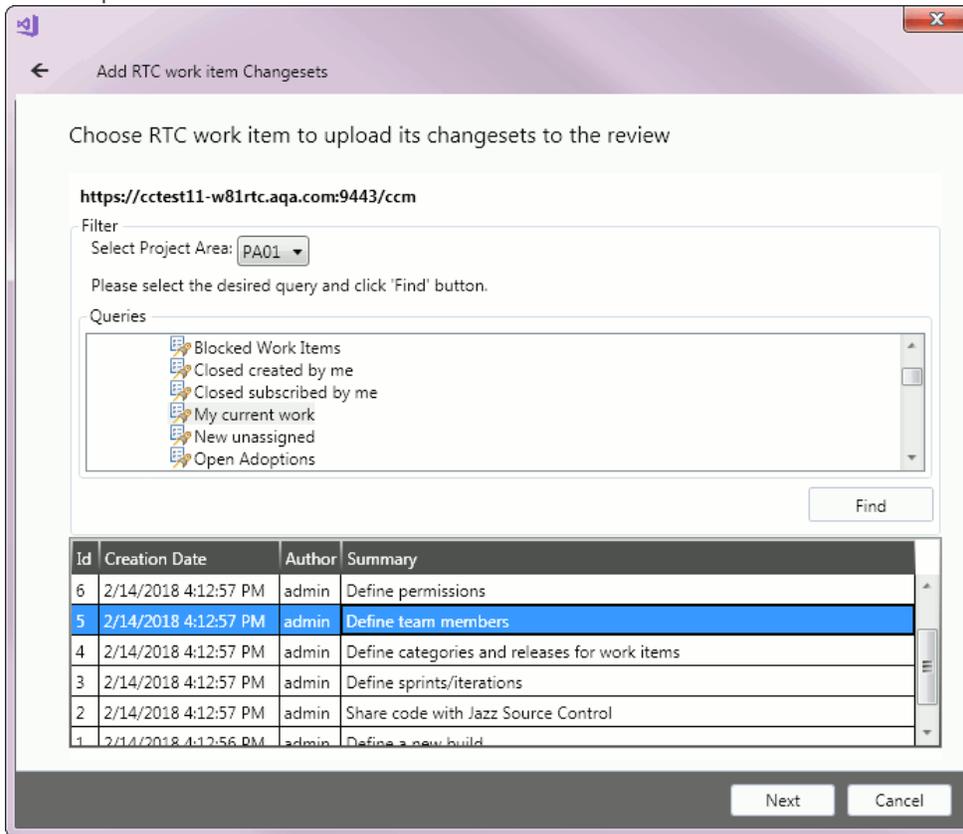
- For Git and Mercurial changelists: Press **Add** and specify the ID of desired changelist.



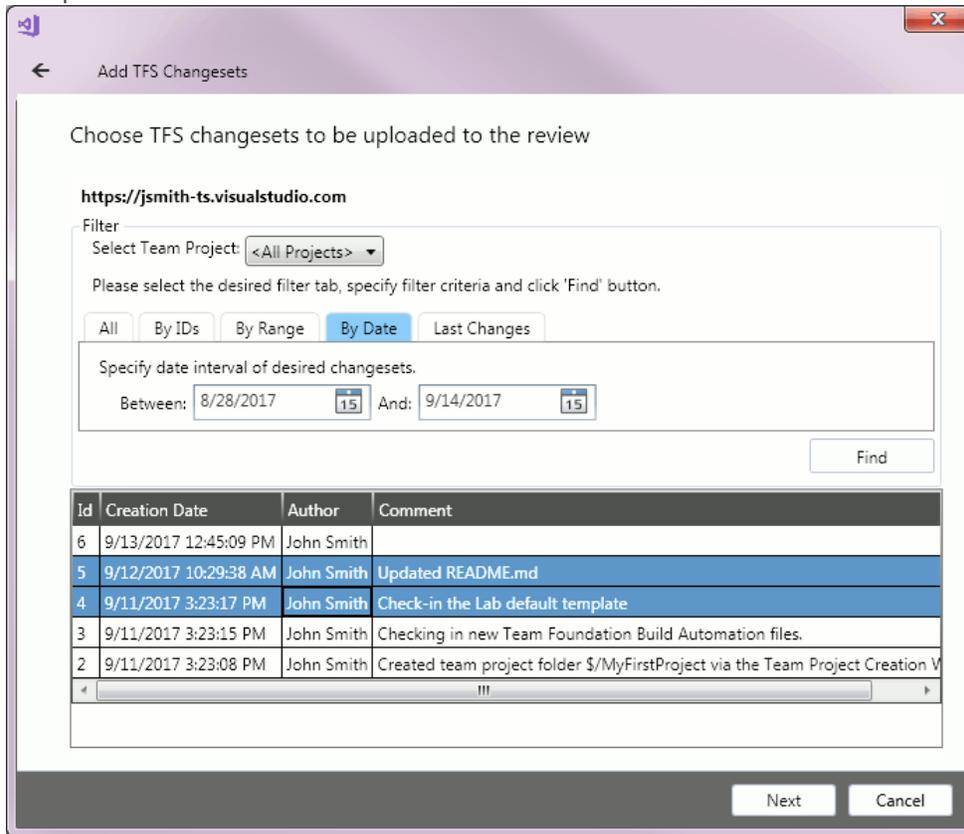
- For RTC changesets: Select desired workspace and component, click **Find** and then select the desired changesets. Use Ctrl or Shift for multiple selection.



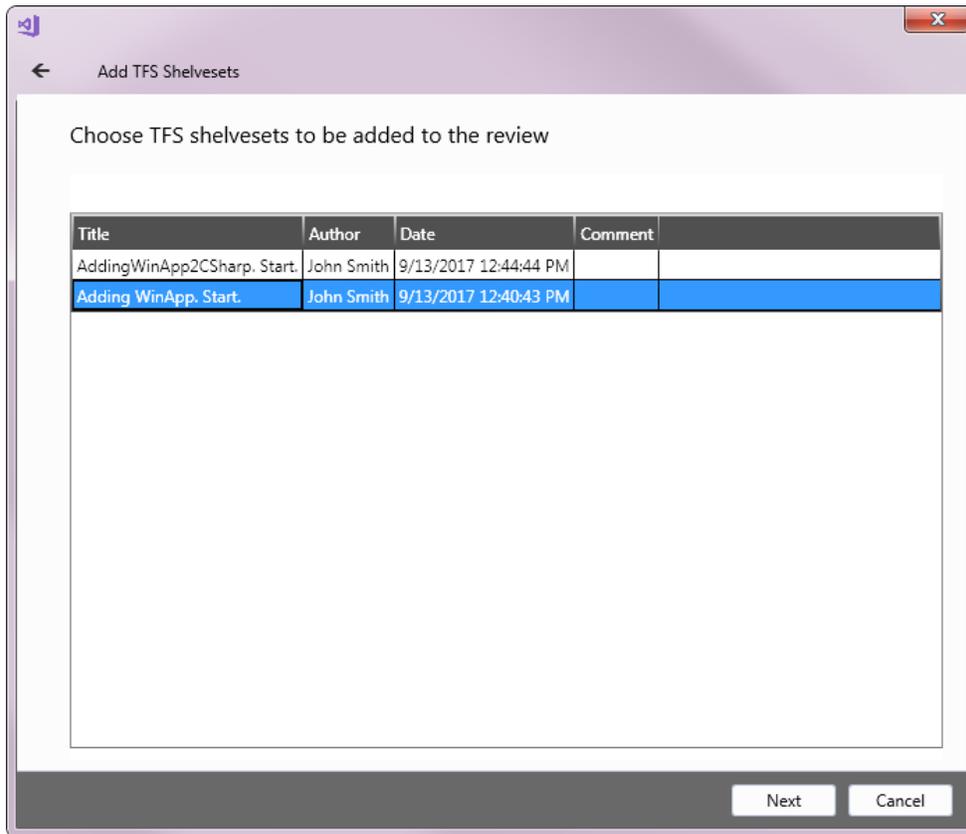
- For RTC work item changesets: Select project area and perform one of the listed queries, click **Find** and then select the desired work item. All changesets that belong to the work item will be uploaded to review.



- For TFS changesets: Select desired team project, specify changesets by their ID, range of IDs or date interval, click **Find** and then select the desired changesets. Use Ctrl or Shift for multiple selection.

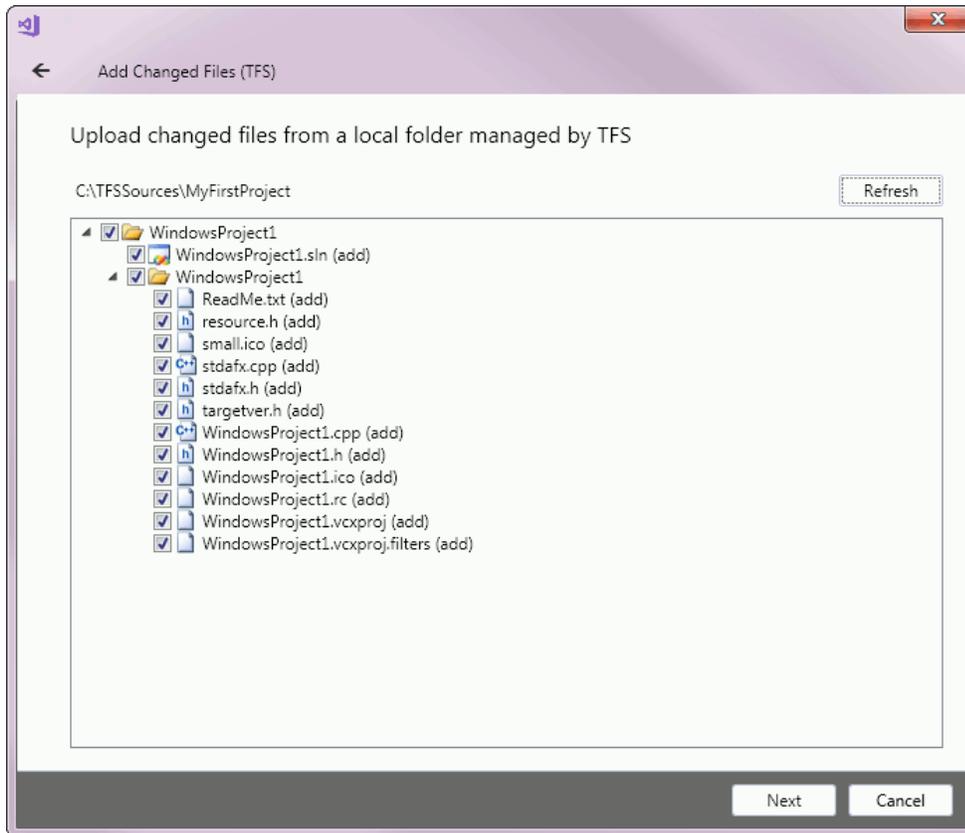


- For TFS shshelvesets: Select the desired shelveset from the list. Use Ctrl or Shift for multiple selection.



When done, press **Next** to proceed.

1.2 Uploading changes

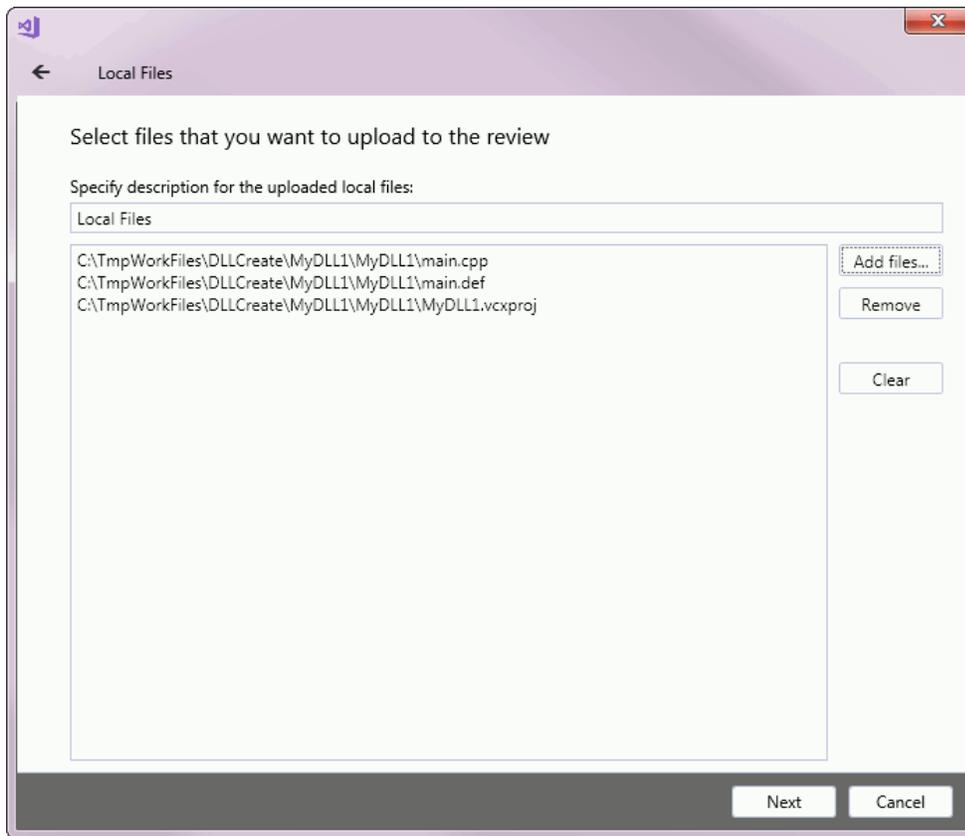


Select which of the modified files to upload.

When done, press **Next** to proceed.

1.3 Uploading local files

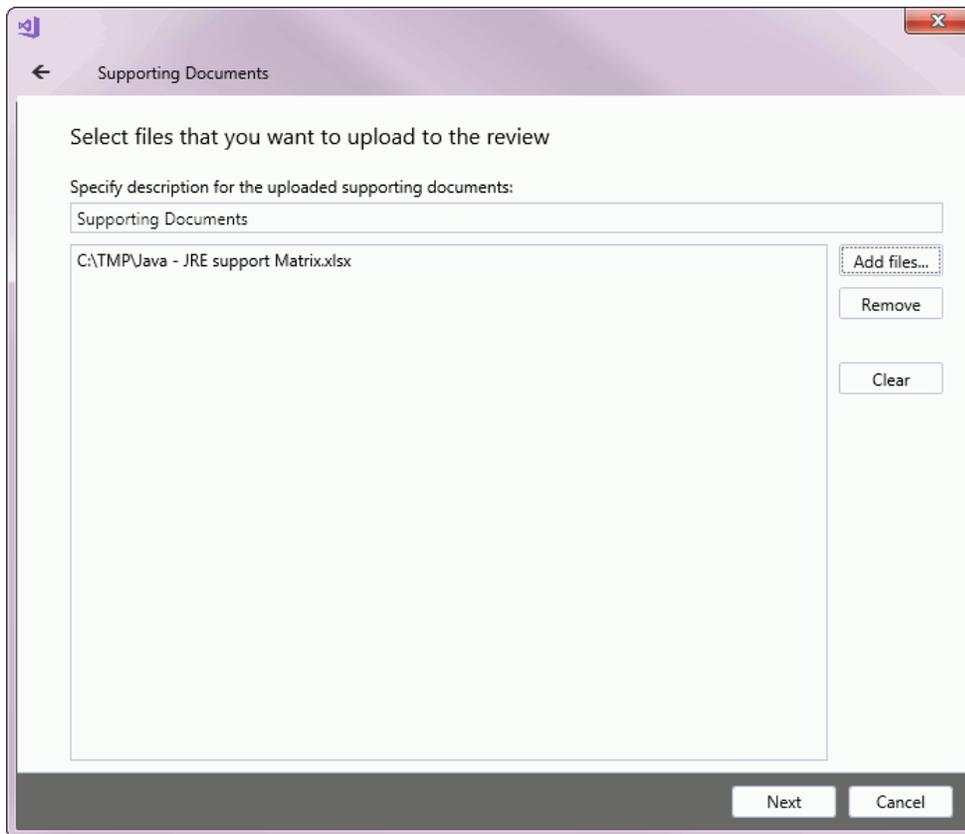
Select this command to upload arbitrary local files. This command does not check if these files are in a source control repository or not, and does not add information on differences to the review along with the files. Use it if you need to create a review for the files that are not in source control.



Click **Add files** to select the desired files in the ensuing Open File dialog, specify the commit message and press **Next**.

2. Select Supporting Documents

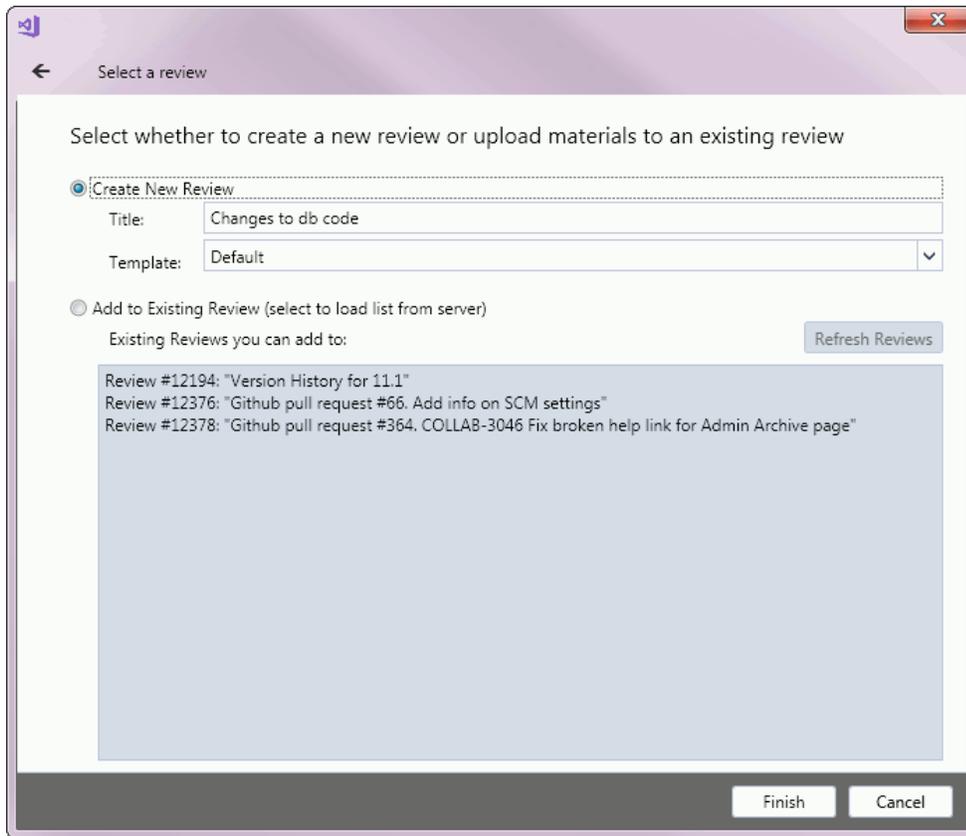
On the second page, you may upload any other documents that supplement the uploaded files.



Click **Add files** to select the desired files in the ensuing Open File dialog, specify the commit message and press **Next**.

3. Select Review

The third page of the Add to Review Wizard asks you to specify which review you would like to add materials to. You can create a new review and add the materials into the newly created review, or you can add the review materials to an existing review.



To add materials to a new review, select **Create New Review**, type a title to name your new review and select the review template.

To add materials to an existing review, select **Add to Existing Review**. Choose the review you would like to add the materials to. The list of possible reviews is created automatically by querying the server. This will generally be the same as the list of reviews in the Collaborator View.

Once you click **Finish** all chosen review materials will be uploaded to the Collaborator server.

Note: Uploading files may take some time. Please be patient. During the upload, a progress dialog will appear.

When the upload is complete, the review will be displayed in the [Review Summary Screen](#) ⁵²⁹.

5.6.2.6 Review Summary Screen

When you click some review in the [Collaborator View](#)^[516] it opens in the Review Summary screen. This window is analogous to the [Review Summary Screen](#)^[316] of Web Client.

Review #12194: Version History for 11.1

Current Status: Waiting for any activity

PLANNING ANNOTATING INSPECTION COMPLETED

REWORK

DETAILS COPY CANCEL

REJECT SAVE TO ZIP

3 Participants 1 Files

0 Chats 0 Defects

Review Title: Version History for 11.1

Role: Author

Created: Friday, July 21, 2017 at 3:22:25 PM

Group: All Users

Template: Default

Completed On: [N/A]

Restrict Access: Participants and Group Based

Overview: Attached is a Version History for 11.1. Could you please take a look at it?

Participants

Add participant... Add self as...

Name	Review Pool	Role	State	Action
Artem Sataev		Author	Waiting	[Email] [Poke] [Close]
Justin Collier		Reviewer	Active	[Email] [Poke] [Close]
Rick Almeida		Observer	Active	[Email] [Poke] [Close]

Remote System Links

Add remote system link...

Remote System	Linked Item	Status	Action
---------------	-------------	--------	--------

You will use the Review Summary Screen during the entire process of code review: creating new reviews, participating in other reviews, correcting found defects.

This screen allows you to --

- Modify general information about the review.
- Reject, cancel, copy, archive your reviews.
- Add or remove participants.
- Send e-mail and poke notifications to participants.
- Check linked remote system items and add new remote system links.
- View defect log.
- Communicate with other participants.

- View and upload materials for the review.
- Start, annotate, approve the review or wait until certain specified activity occur.

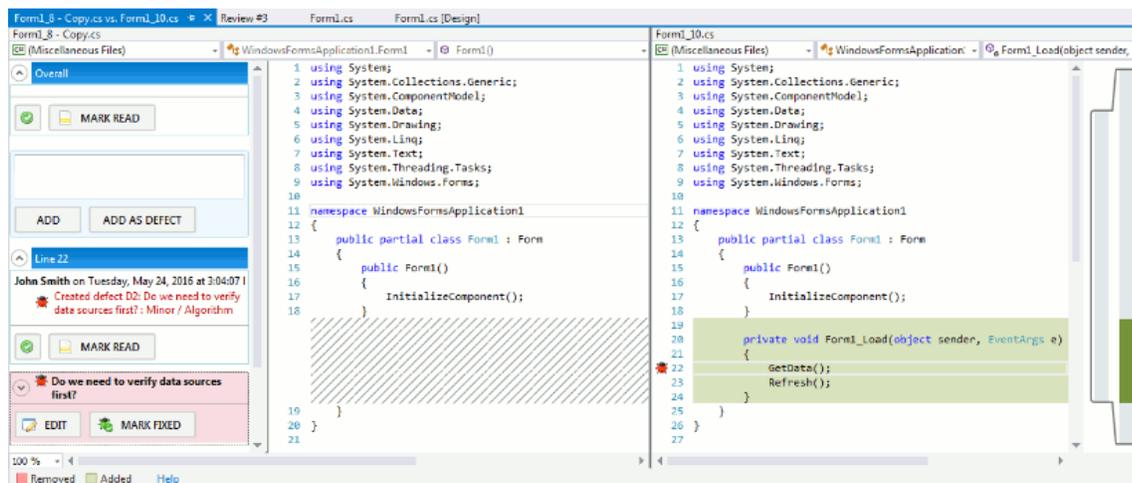
5.6.2.7 Code Viewer and Diff Viewer

Clicking on a file in the [Review Summary Screen](#) ⁵²⁹ opens it in a Code Viewer or in a Diff Viewer.

Important: Collaborator Visual Studio extension is designed to perform code reviews, rather than document reviews. That is, from the Visual Studio IDE you can review and compare source code and text files, but may fail to review and compare other types of review materials. To review Word documents, Excel tables, PDF files, images, or URLs you should use the Collaborator [Web Client](#) ²⁸⁶.

If a review has only one revision of the desired file, it will be opened in a Code Viewer (standard code editor of Visual Studio in read-only mode).

If a review has several revisions of the desired file, it will be opened in a Diff Viewer (standard [Diff Window](#) of Visual Studio).



Two revisions of a file in a Diff Viewer

In the Diff Window, the most recent revision is displayed on the right pane and the previous revision is displayed in the left pane. New text is highlighted in green and removed text is highlighted in red.

The comment icon () in the viewer's gutter indicates that a line has some comments related to it. The defect icon () indicates that a line has some defects related to it. Click the icon to navigate to the corresponding comment or defect.

Conversation Pane

On the left side of a Code Viewer and Diff Viewer, a Conversation Pane is displayed. It lists the comments and defects that were created for the file being displayed. You can read the conversation, reply to and/or argue with other participants, mark the defects as fixed and so on.

Comments and defects may relate to the entire file (these are called **overall comments and defects**) as well to a particular line of code (these are called **line comments and defects**).

To create an overall comment:

1. Specify your message in the Overall section of the Conversation pane
2. Press **Add**.

To create an overall defect:

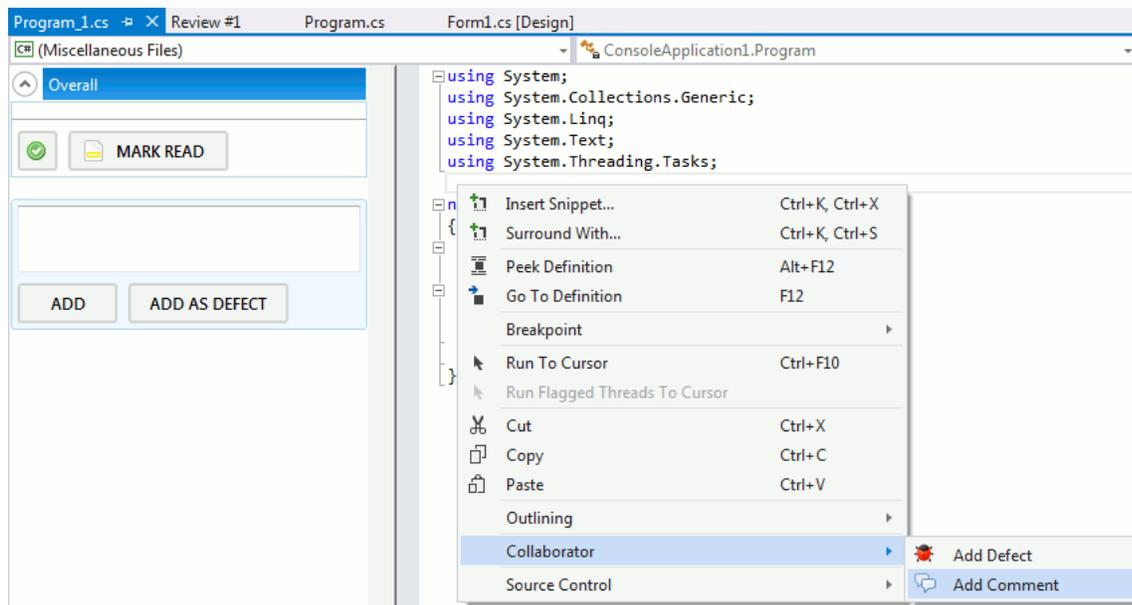
1. Specify your message in the Overall section of the Conversation pane.
2. Press **Add as Defect** and specify defect type and severity.

To create a line comment:

1. Right-click the desired line and choose **Collaborator | Add Comment** from the context menu.
2. Specify your message in the subsequent dialog and press **Add comment**.

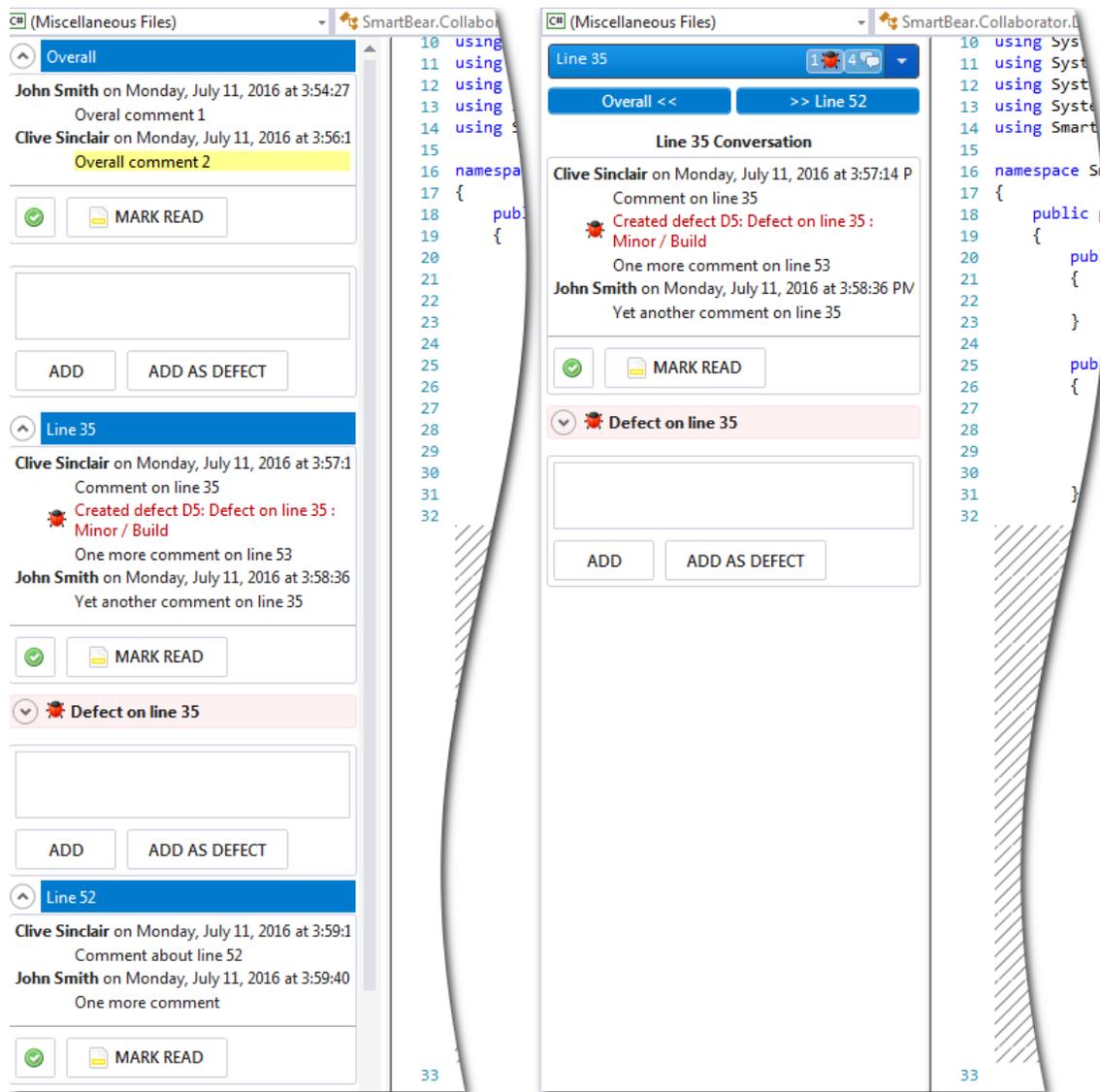
To create a line defect:

1. Right-click the desired line and choose **Collaborator | Add Defect** from the context menu.
2. Specify your message, defect type and severity in the subsequent dialog and press **Add defect**.



Creating line comments and defects

Depending on the Group conversations by lines^[507] setting, the Conversation Pane may display all defects and comments simultaneously or group comments and defects that relate to the same line. In the latter layout, you may use combobox and buttons to navigate between conversations that relate to different lines.



Conversation pane: "Standard" and "Group by lines" layouts

5.7 Tray Notifier

The Tray Notifier is a cross-platform tray notifier client interface to the Collaborator server. It can be used to provide an easy way to see what reviews you are currently participating in, and prompt notification when a review requires your attention.

Starting the Tray Notifier

The Tray Notifier is an executable named `ccollabtray`. On Windows machines the [graphical installer](#)⁴²⁶ includes an option to automatically run the Tray Notifier on startup (a shortcut to `ccollabtray` is placed in the Windows Start Menu Startup folder). Non-Windows platforms have to manually start `ccollabtray`.



Configuring the Tray Notifier

If you used the [graphical installer](#)^[426], your connection to the Collaborator Server should be configured already. Otherwise, you will be prompted when you try to connect. You can also select the *Preferences* item in the [context menu](#)^[534] to open the preferences dialog. Use the [Server Connection Preferences](#)^[432] page to configure the connection information to your Collaborator Server.

Using the Tray Notifier

Clicking on the Tray Notifier opens a list of your current Action Items.

Action Items		
Task	Review	Role
Finish creating	Review #1: "Untitled Review"	
Perform	Review #2: "(added) COLLAB-3320. Rich text comments"	Reviewer

Tray Notifier Action Items

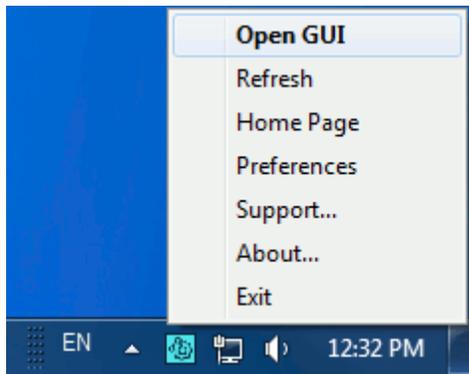
The Action Items list can be resized and moved by dragging its borders. Action Items which are urgent appear with a red icon. Action Items which are not urgent appear with a green icon. Double-clicking on an Action Item opens a page in a browser window which lets you perform the action. Commit Action Items will open a wizard that will walk you through committing your files. Most changes can be committed with the tray notifier, but often changes to the directory structure will require that you use your SCM's tools directly.

The Tray Notifier icon changes to show a check-mark to alert you when there are new Action Items that require your attention.



Context Menu

The context menu of the Tray Notifier (right-click on Windows) includes several options:



Tray Notifier context menu

- *Open GUI* launches GUI Client
- *Refresh* immediately checks the Collaborator Server for updated Action Items
- *Home Page* opens your Collaborator [Home Page](#)^[307] in a browser window
- *Preferences* opens the [client preferences dialog](#)^[432]
- *About...* tells you information about your installation
- *Exit* shuts down the Tray Notifier

5.8 External Diff Viewer Launcher

About

External Diff Viewer Launcher is a cross-platform helper utility that allows comparing review materials in any third-party diff viewer instead of [Web Client's diff viewer](#)^[339]. This utility launches the selected external diff viewer on your local computer, retrieves diff data from the Collaborator server and transforms it to the format used by the external diff viewer.

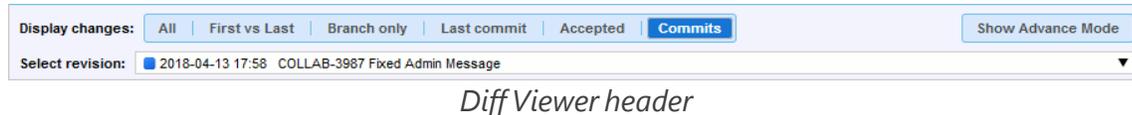
Prerequisites

- **[Install Collaborator Client](#)**^[425] - External Diff Viewer Launcher is part of the Collaborator desktop client package.
- **Install your preferable diff viewer** - External Diff Viewer Launcher can work with almost any third-party diff viewer, and has presets for 5 most popular diff viewers.
- **[Configure External Diff Viewer Launcher](#)**^[537] - Specify the arguments to be used when invoking an external diff viewer.
- **[Associate the launcher with Collaborator diff files](#)**^[538] - Process Collaborator diff files by using External Diff Viewer Launcher.

Launch an external diff viewer for a single file

To compare two revisions of a single file:

- Open the desired file in [Web Client's diff viewer](#)^[339].
- Select the revisions you want to compare using Select revision, Display changes or other controls of the [Diff Viewer header](#)^[344].



- Press the  **External Diff Viewer** button on the Diff Viewer toolbar.



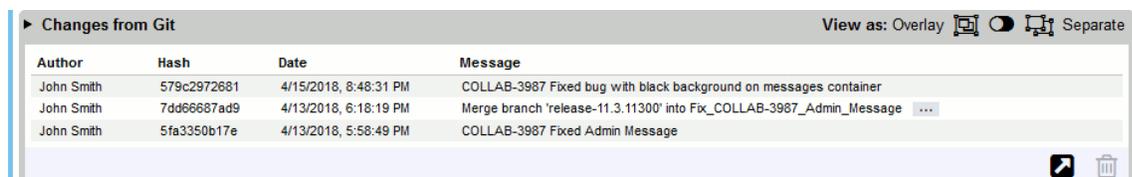
This will download the Collaborator diff file for the chosen revisions of the file, and, if [file type association](#)^[538] was made, will launch the external diff viewer and compare the revisions in it.

Launch an external diff viewer for multiple files

To compare the changes made to multiple files (two directory trees):

- Open the desired review in the [Review Screen](#)^[316].
- Scroll to the **Review Materials** section and find the desired changelist.

- Press the  **External Diff Viewer** button in the Changelist info section.



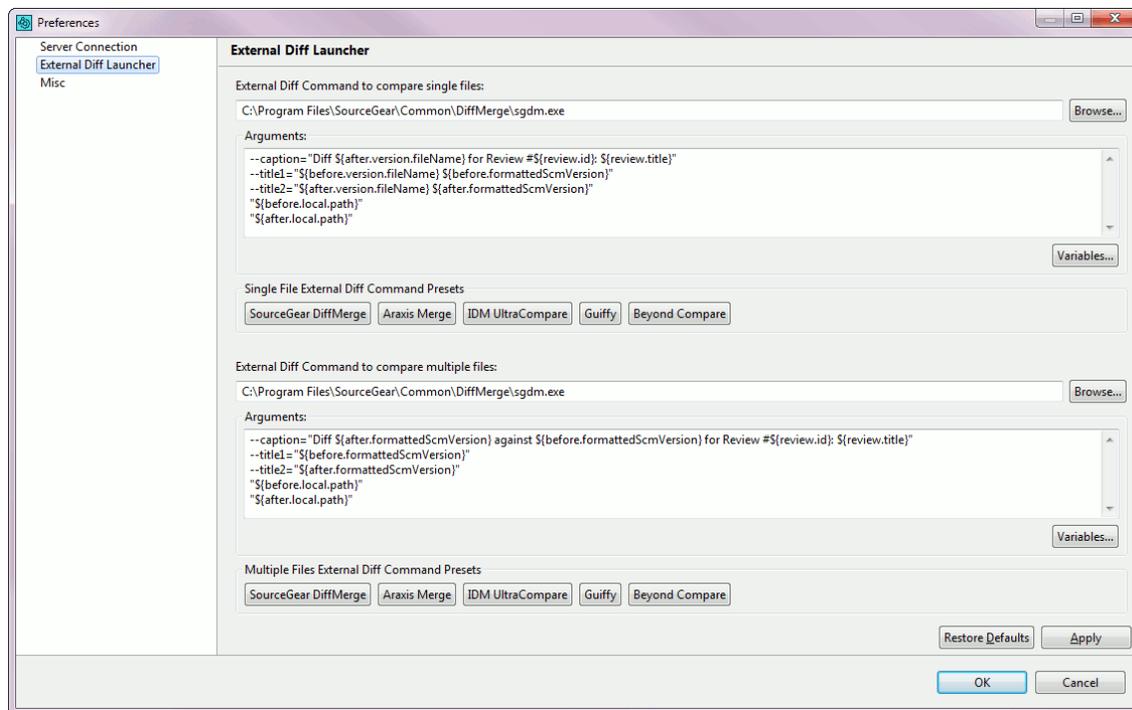
This will download the Collaborator diff file for the chosen set of files, and, if [file type association](#)^[538] was made, will launch the external diff viewer and compare the files in it.

Configure the launcher for a particular diff viewer

Since various third-party diff viewers have a different set of command-line arguments, you will have to specify what command-line arguments the launcher should use for your preferable diff viewer. To configure the launcher:

- Open Collaborator [GUI Client](#)⁴³⁶.
- Click **File > Preferences** on the main screen.
- In the ensuing Preferences dialog, click the **External Diff Launcher** item in the left panel.

This will display the [External Diff Viewer launcher preferences](#)⁴⁴²:



- The preferences are divided into two separate groups, one for comparing two versions of a single file, and another for comparing multiple files. Specify the path to your diff viewer executable and the command-line arguments to use for each group.

There are argument presets for 5 most popular diff viewers:

- SourceGear DiffMerge
- Araxis Merge
- IDM UltraCompare

- Guiffy
- Beyond Compare

To use one of the presets, just click the appropriate button.

- Press **OK** to close the dialog and apply the settings.

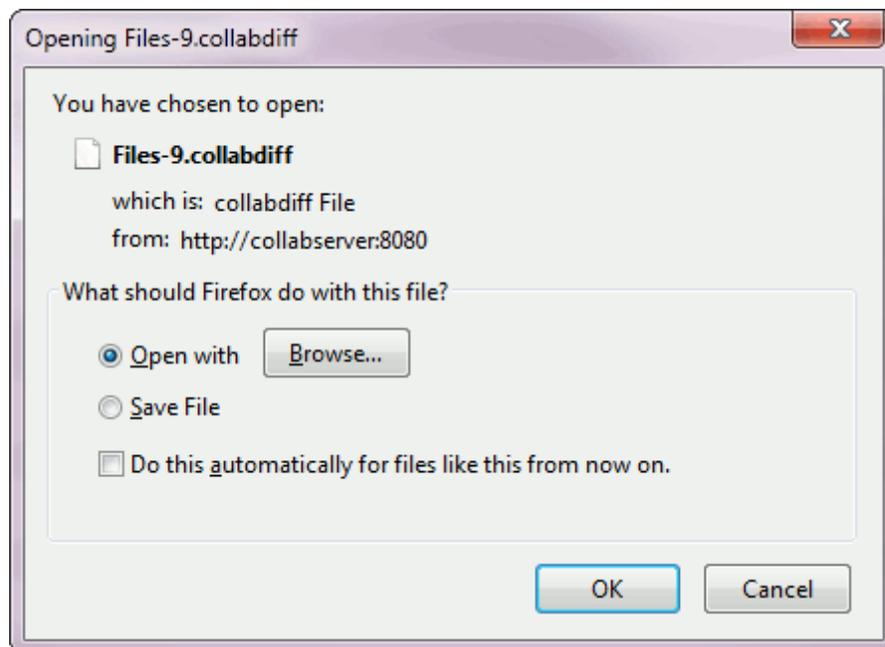
Associate the launcher with Collaborator diff files

Collaborator server returns diff data in its own internal format. Physically, these are files that have the *.collabdiff* extension. In order to process Collaborator diff files, you need to associate this extension with the External Diff Viewer Launcher executable.

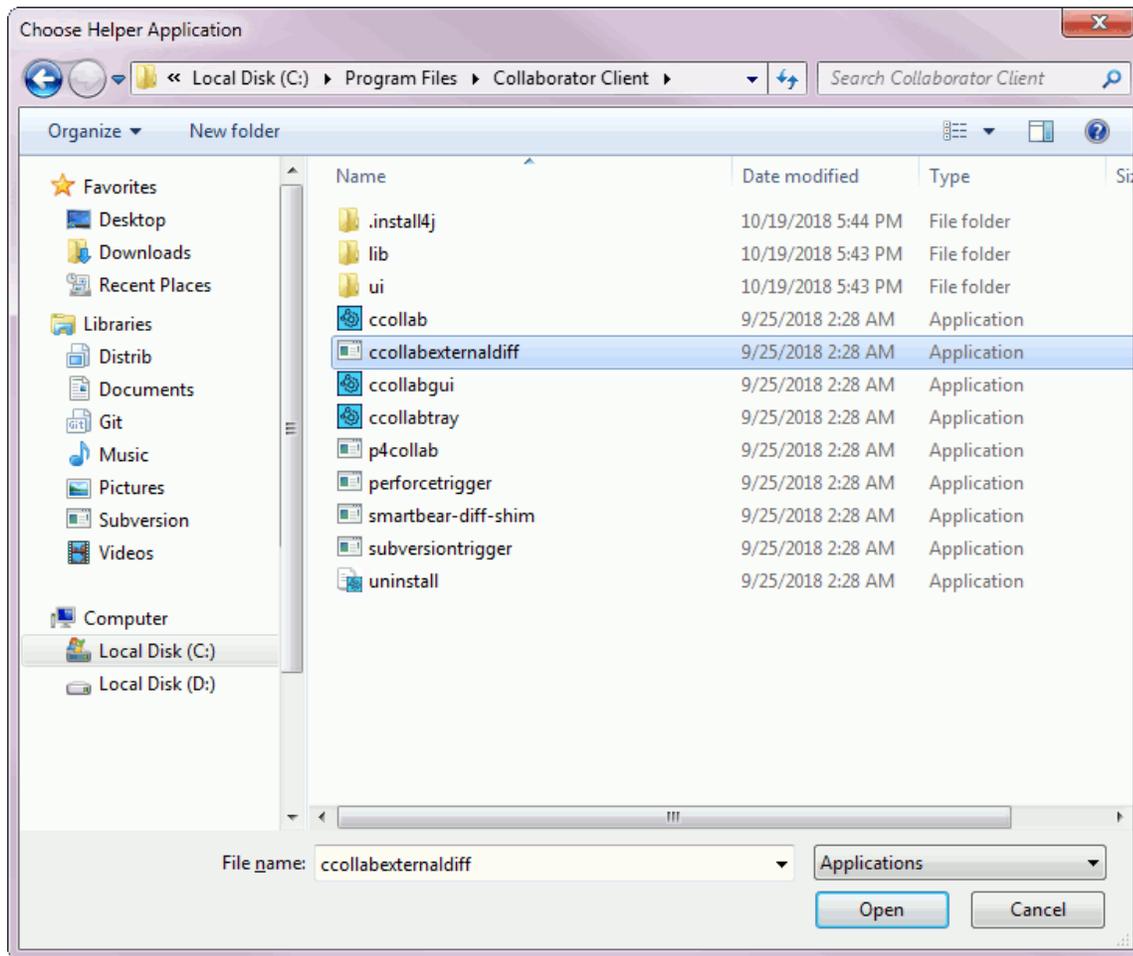
The instructions below describe how you can do this in the Mozilla Firefox browser. The steps may vary slightly in other browsers.

To associate the launcher with Collaborator diff files:

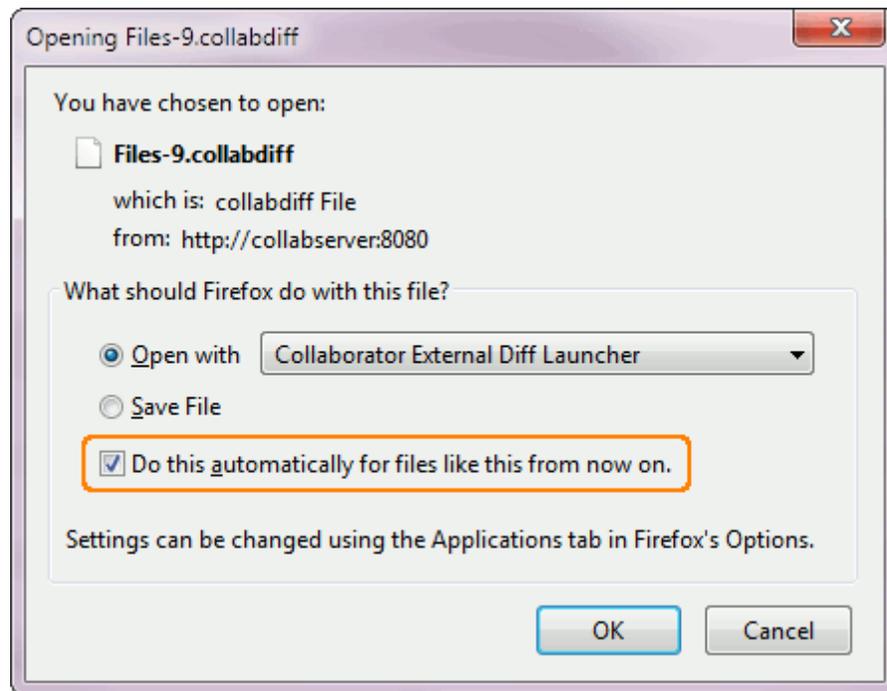
- Open any review in Collaborator Web Client
- Locate any of the  **External Diff Viewer** buttons and click it.
The Mozilla Firefox browser will suggest that you select an application to open the file with.



- Select **Open with** and click **Browse**. You will be prompted to choose an application:



- Select `ccollabexternaldiff.exe` in the *Collaborator Client* folder and click **Open**.
- In the Opening File window, click **Do this automatically for files like this from now on**:



- Click **OK** to save these settings.

This should be performed only once. Later on, clicking the  **External Diff Viewer** buttons in Web Client will automatically invoke the launcher, which in its turn will invoke the diff viewer.

6 Version Control Integrations

Collaborator integrates with many popular Version Control Systems. Integrations include command-line, graphical, and Eclipse plug-in clients and Version Control triggers. Server integration is supported for selected Version Control Systems and requires that a properly configured client be configured on the Collaborator server.

Note: *Support of version control systems varies depending on Collaborator edition. Collaborator Community supports only Git and Subversion. Collaborator Team additionally supports CVS, Mercurial, Perforce and Team Foundation Server. Collaborator Enterprise supports all version control systems listed below. For a complete list of differences between Collaborator editions, please see the [comparison page](#)^[3]*

In This Section

- [AccuRev Integration](#)^[542]
- [CVS Integration](#)^[553]
- [Git Integration](#)^[563]

- [IBM Rational ClearCase Integration](#) ^[583]
- [IBM Rational Synergy Integration](#) ^[605]
- [IBM Rational Team Concert Integration](#) ^[614]
- [Mercurial Integration](#) ^[645]
- [Microsoft Team Foundation Server Integration](#) ^[653]
- [PTC Integrity Integration](#) ^[666]
- [Perforce Integration](#) ^[678]
- [Subversion Integration](#) ^[710]

Related Topics of Interest

- [Repository Hosting Service Integrations](#) ^[735]
Describes integrations with remote repository hosting services.

6.1 AccuRev Integration

This section describes Collaborator integration with AccuRev:

GUI Client⁵⁴³

The GUI Client can upload local changes to files⁵⁴⁵ controlled by AccuRev before they are promoted. This includes both kept and modified files in the local Workspace. The GUI Client can also upload pending changes in a Stream⁵⁴⁸, differences in a Transaction⁵⁴⁶, and arbitrary AccuRev diffs⁵⁴⁷.

Command-Line Client⁵⁴⁸

The Command-Line Client can upload local changes to files⁵⁴⁹ controlled by AccuRev before they are promoted. This includes both Kept and modified files in the local Workspace. The Command-Line Client can also upload pending changes in a Stream⁵⁵², differences in a Transaction⁵⁵¹, and arbitrary AccuRev diffs⁵⁵².

Eclipse Plug-in

The Eclipse Plug-in⁴⁶⁴ integrates the AccuRev Plug-in for Eclipse from <https://www.microfocus.com/documentation/accurev/> so you can upload⁴⁸⁴ locally modified files to a Review.

Supported Versions

Our Command-Line Client uses your own AccuRev command-line client (`accurev`) to communicate with the server. We support these versions:

- v4.5.3, 5.5

Because we use client applications already present on your computer, we support all protocols, authentications, proxies, and other client configuration options you are currently using.

Support for Copy / Move

Collaborator fully supports AccuRev's file and directory copy/move semantics. Thus, if a file is copied or moved rather than added from scratch, it will show up that way in the various user interfaces.

Support for Directory-level New/Delete/Copy/Move

Collaborator partially supports AccuRev's concept of directories (not just files) being altered.

All files underneath the directories in question will be scanned, uploaded and represented properly in the GUI. The directories themselves will *not* be shown in any GUI, or even in the [file list](#) ⁴⁴⁸ confirmation screen presented by the command-line client.

This all works correctly even if, for example, you move a parent directory *and* alter/add/delete a file within that directory in the same changelist. You will get the correct content for the file but the directory itself will not be listed in the review.

Support for Include / Exclude Rules

Collaborator treats files or folders that conform to AccuRev's include rules as added or modified files/folders, while files and folders that conform to exclude rules are treated as deletions. To denote files and folders that were added or removed due to include/exclude rules, Collaborator uses the following descriptions of change types:

- **INCLUDED** - The file was added because of include rule.
- **EXCLUDED** - The file was removed because of exclude rule.
- **INCLUDED_DIR** - The folder and all its files and sub-folders were added because of include rule.
- **INCLUDED_DIR_ONLY** - The folder but not any of its files or sub-folders were added because of include rule.
- **EXCLUDED_DIR** - The folder and all its files and sub-folders were removed because of exclude rule.

Technical Details and Limitations

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you add several diffs (non atomic changelists) to the same review.

6.1.1 GUI Client

AccuRev-specific Options

The [SCM Configuration dialog](#) ⁴³⁷ has several AccuRev-specific options. If there is no AccuRev Workspace on your machine, you can still review committed AccuRev Transactions by specifying the AccuRev Depot name option.

Add SCM Configuration

Local Source Code Location: C:\Work\Programs

SCM: AccuRev

SCM Specific Options

AccuRev Depot:

AccuRev depot name (accurev-depot)

AccuRev Executable:

Full path to the `accurev` command-line client (accurev-exe)

AccuRev History Algorithm:

Which algorithm to use when calculating the predecessor, either predecessor, previous-occupant, or basis-version (accurev-anc-algorithm)

Result Configuration

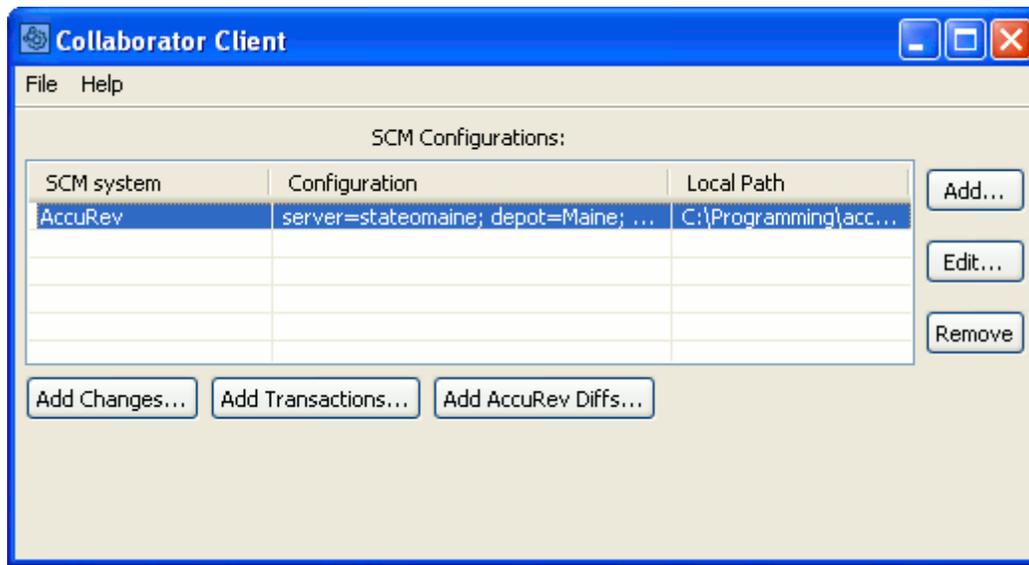
SCM: AccuRev

Configuration: Select 'Validate...' below to validate configuration

AccuRev SCM Configuration

Uploading files to a Review

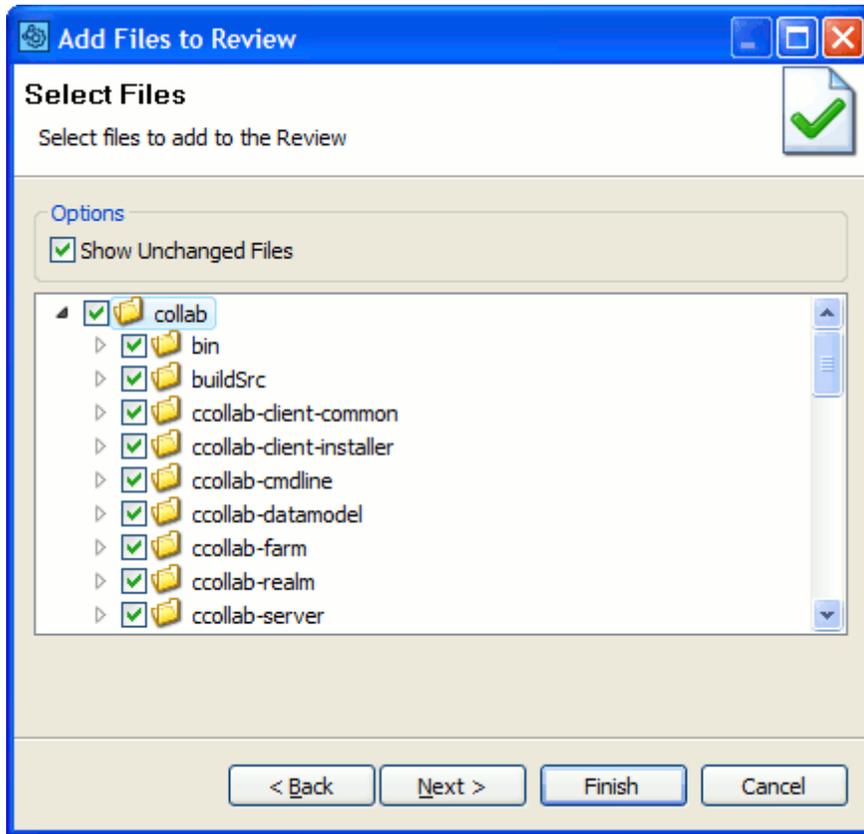
Selecting an AccuRev SCM Configuration in the GUI Client [main screen](#)^[435] causes three Add to Review buttons to appear. The [Add Changes...](#)^[545] button uploads modified files in a Workspace. The [Add Transactions...](#)^[546] button uploads the files in committed Transactions. The [Add AccuRev Diffs...](#)^[547] button uploads arbitrary diffs, or [compares the differences between two Streams](#)^[548].



Uploading AccuRev files to a Review

Add Changes

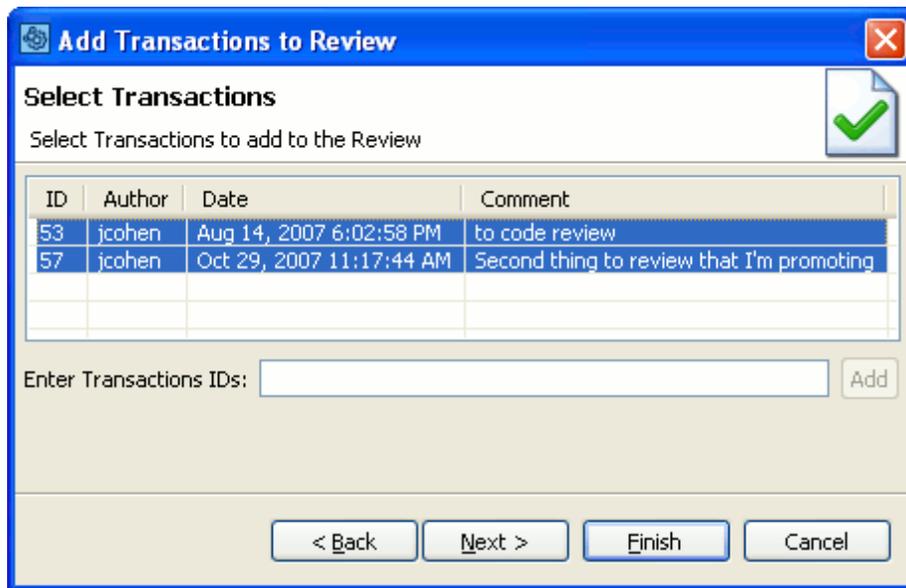
Press the *Add Changes...* button to upload modified files in a Workspace to the Collaborator Server for review.



Add Changes

Add Transactions

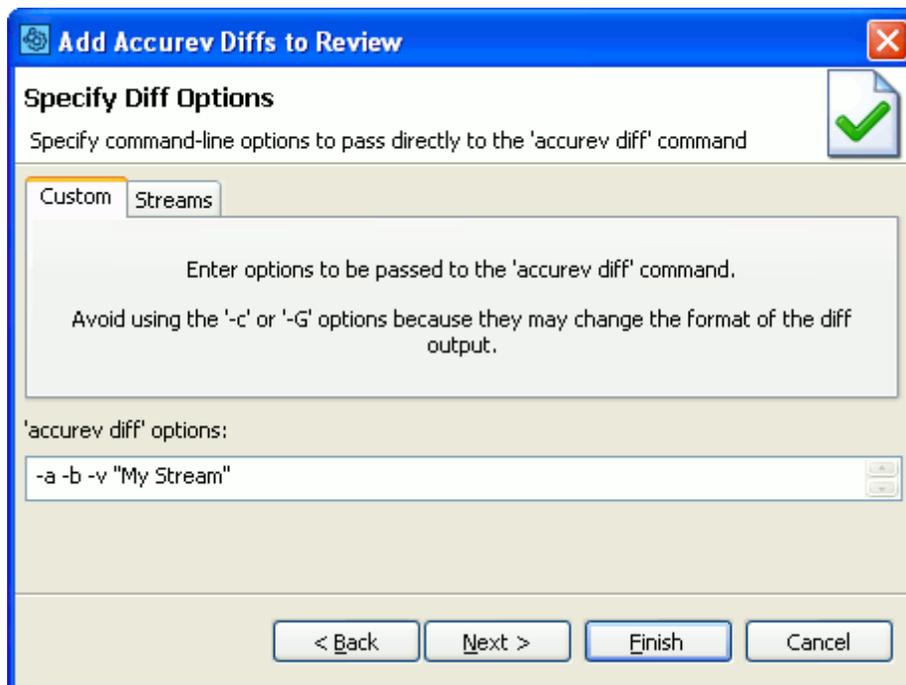
Press the *Add Transactions...* button to upload the files in an AccuRev Transaction to the Collaborator Server for review.



Add Transactions

Add AccuRev Diffs

Press the *Add AccuRev Diffs...* button to upload arbitrary AccuRev diffs to the Collaborator Server for review.

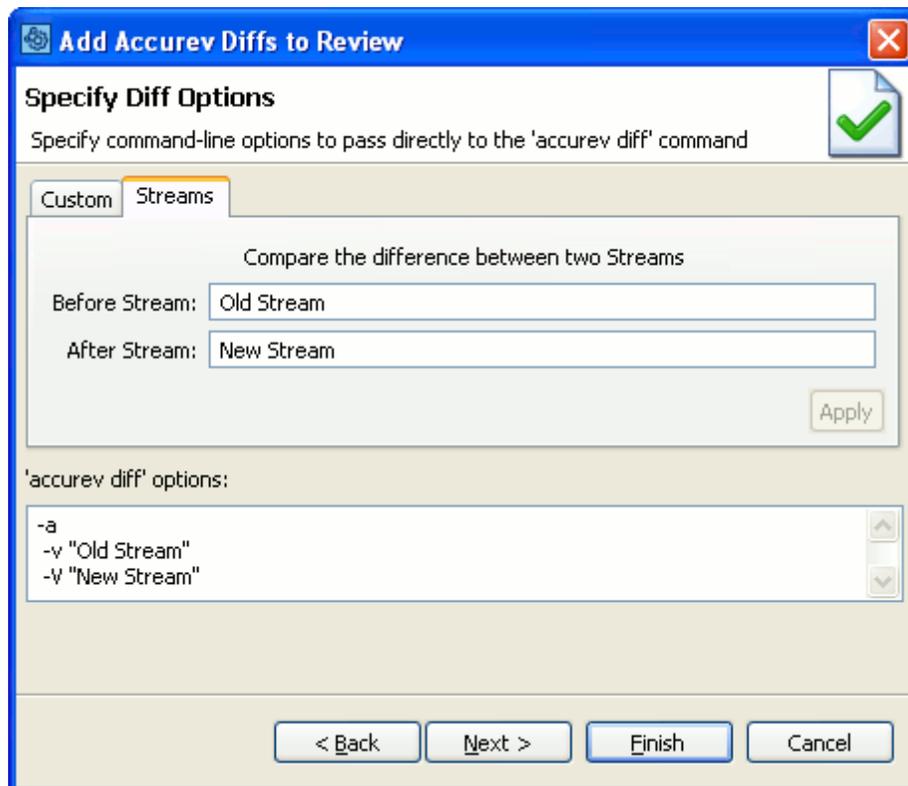


Add AccuRev Diffs

You can enter arbitrary AccuRev diff options, or select the [Streams tab](#)^[548] to compare the difference between two Streams.

6.1.1.1 Comparing two Streams

Press the [Add AccuRev Diffs...](#)^[547] button on the [main screen](#)^[435] and then select the *Streams* tab to upload the difference between two Streams.



Upload the difference between two Streams

6.1.2 Command-Line Client

Commands recommended for AccuRev

[ccollab addchanges](#)^[549] - Attaches locally-modified files to a review

[ccollab addchangelist](#)^[551] - Attaches an atomic changelist to a review

[ccollab addardiffs](#)^[552] - Uploads diffs generated from accurev diff command

[ccollab addstream](#)^[552] - Attaches pending differences from an AccuRev stream

The `addchanges` command will upload local changes to files controlled by AccuRev before they are promoted. This includes both kept and modified files in the local workspace.

The `addchangelist` command will upload a list of AccuRev transactions.

Configuration

In most cases, the Command-Line Client can automatically detect your AccuRev configuration. Try [testing your configuration](#) to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your AccuRev configuration or you want to override the detected settings, you can manually specify AccuRev settings using [global options](#).

To manually configure the Command-Line Client to use AccuRev, execute the following command:

```
ccollab set scm accurev
```

AccuRev-specific Options

Option	Description
<code>--accurev-depot <value></code>	AccuRev depot name
<code>--accurev-exe <value></code>	Full path to the `accurev` command-line client
<code>--accurev-anc-algorithm <value></code>	Which algorithm to use when calculating the predecessor, either predecessor, previous-occupant, or basis-version

Example:

```
ccollab set accurev-depot MyDepot
```

6.1.2.1 addchanges (for AccuRev)

Description

The `ccollab addchanges` command uploads locally modified files controlled by AccuRev to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchanges [--upload-comment <value>]
<review> <file-spec> [<file-spec> ...]
```

Command Options

Option	Required?	Description
global-options	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ^[455] .
--upload-comment <value>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<file-spec> [<file-spec> ...]	Yes	Files to be added and/or folders to scan for modified files. Separate multiple file and folder names with spaces. If a file or folder name contains spaces, enclose this name in quotes. ccollab scans folders recursively. The resulting list includes the name of modified files. "Modifications" include include edits, additions, deletions, branches, integrations, moves, copies, and so on. After the scan is complete, a file list is presented in a graphical editor so you can review the files to be uploaded and make correct the list, if needed.

Examples:

To create a new review and add all changes in the current directory and below, plus the file foo.txt, you would use:

```
ccollab addchanges new . foo.txt
```

To upload modified files from the current working directory and all subdirectories to review 123:

```
ccollab addchanges 123 .
```

To upload file foo.txt and modified files from c:\dev\project into a brand new review:

```
ccollab addchanges new foo.txt c:\dev\project
```

6.1.2.2 addchangelist (for AccuRev)

Description

The `ccollab addchangelist` command attaches all files from a submitted AccuRev changelist (transaction) to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchangelist <review> <changelist>
[<changelist> ...]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or AccuRev-specific global options. See Command-line Global Options Reference ^[455] .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<changelist> [<changelist> ...]	Yes	Identifier(s) of the desired changeset(s) in your source control.

Examples:

To upload Transactions t4321 and t7568 to a new review:

```
ccollab addchangelist new 4321 7568
```

To upload Transactions t5432 and t12654 to review 111:

```
ccollab addchangelist 111 5432 12654
```

6.1.2.3 addardiffs

Description

The `ccollab addardiffs` command uploads differences between arbitrary versions of files in AccuRev. The differences are generated using the native 'accurev diff' command of AccuRev.

Command Line Syntax:

```
ccollab [global-options] addardiffs [--upload-comment <value>]
<review> [<user-diff-arg> [<user-diff-arg> ...]]
```

Command Options

Option	Required?	Description
<code>--upload-comment <value></code>	No	Comment used to upload files (defaults to command-line arguments)
<code><review></code>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<code><user-diff-arg> [<user-diff-arg> ...]</code>	No	Command-line arguments to pass directly to the diff command

Examples:

```
ccollab addardiffs 698 -a -b -v "My Stream"
```

Remarks:

- Do not use diff arguments that affect the diff output such as '-c' or '-G'. The Collaborator command-line client will automatically select an output format that ensures you will get all the data you need on the server.
- This command does not upload added or deleted files due to AccuRev limitations.

6.1.2.4 addstream

Description

The `ccollab addstream` command uploads differences pending promotion in an AccuRev stream.

Command Line Syntax:

```
ccollab [global-options] addstream [--upload-comment <value>]
<review> [<stream>]
```

Command Options

Option	Required?	Description
--upload-comment <value>	No	Comment used to upload files
<review>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<stream>	No	Specify an AccuRev stream by name, or leave blank to use the current workspace

6.2 CVS Integration

This section describes Collaborator integration with CVS:

GUI Client⁵⁵⁵

The GUI Client can upload local changes to files⁵⁵⁶ controlled by CVS before they are checked into version control. The GUI Client can also upload arbitrary CVS diffs⁵⁵⁷, or the difference between two Labels⁵⁵⁷ or dates⁵⁵⁸.

Command-Line Client⁵⁵⁹

The Command-Line Client can upload local changes to files controlled by CVS before they are checked into version control. The Command-Line Client can also upload arbitrary CVS diffs.

Eclipse Plug-in

The Eclipse Plug-in⁴⁶⁴ integrates with the Eclipse CVS team plug-in so you can upload⁴⁸⁴ locally modified files with full support from the CVS Eclipse code.

Supported Versions

Our [Command-Line Client](#)^[445] uses your own CVS command-line client (cvs) to communicate with the server. We support these versions:

- v1.11.1 and later
- v1.11.0 and before, only [ccollab addcvsdiffs](#)^[561] is supported
- CvsNT (Windows-only)

The [Eclipse Plug-in](#)^[464] uses the Eclipse CVS plug-in to communicate with the CVS server.

Because we use client applications already present on your computer, we support all protocols, authentications, proxies, and other client configuration options you are currently using.

Technical Details and Limitations

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you add several diffs (non atomic changelists) to the same review.

6.2.1 GUI Client

CVS-specific Options

The [SCM Configuration dialog](#)^[437] has several CVS-specific options.

The screenshot shows the 'Add SCM Configuration' dialog box. The title bar reads 'Add SCM Configuration'. The dialog is divided into several sections:

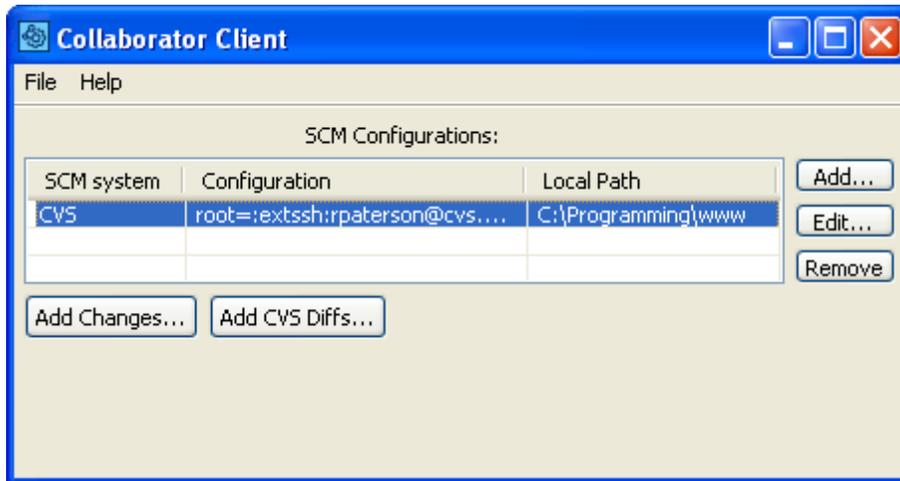
- Local Source Code Location:** A text box containing 'C:\Work\Programs' and a 'Browse...' button.
- SCM:** A dropdown menu currently set to 'CVS'.
- SCM Specific Options:** A section containing:
 - CVS Executable:** A text box and a 'Browse...' button. Below it is the text 'Full path to the `cvs` command-line client (cvs-exe)'.
 - CVS Root:** A text box. Below it is the text 'Connection to the CVS repository (cvsroot)'.
- Result Configuration:** A section containing:
 - SCM:** A dropdown menu set to 'CVS'.
 - Configuration:** A text box containing the text 'Select `Validate...` below to validate configuration'.

At the bottom right of the dialog are two buttons: 'Validate...' and 'Cancel'.

CVS SCM Configuration

Uploading files to a Review

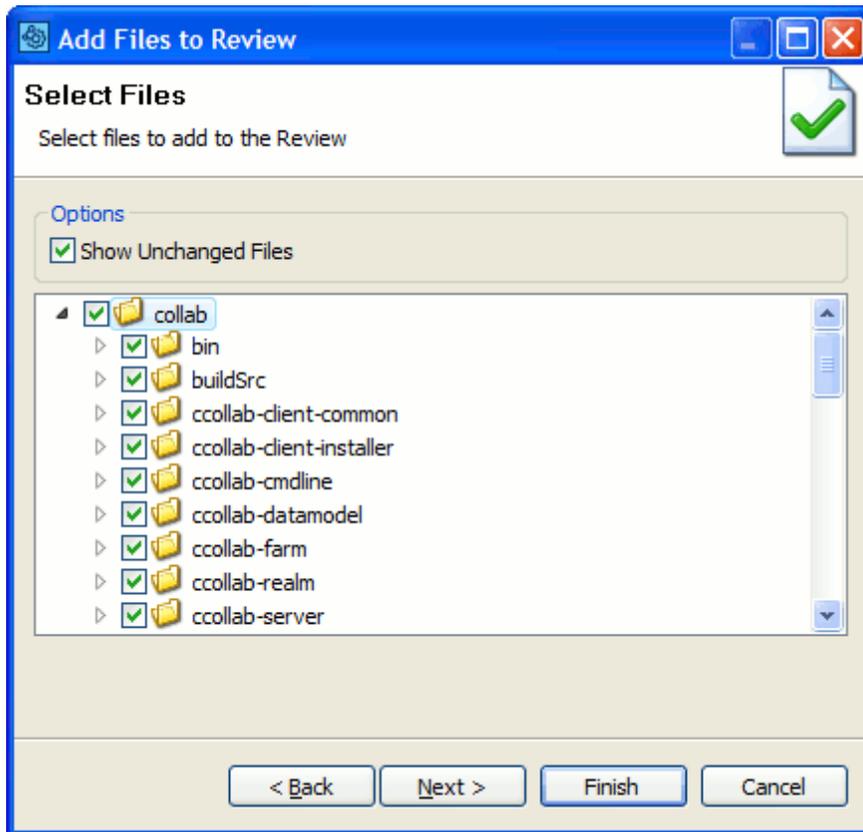
Selecting a CVS SCM Configuration in the GUI Client [main screen](#)^[435] causes several Add to Review buttons to appear. The [Add Changes...](#)^[556] button uploads modified files in a CVS checkout. The [Add CVS Diffs...](#)^[557] button uploads arbitrary diffs, or compares the difference between two [Labels](#)^[557] or [dates](#)^[558].



Uploading CVS files to a Review

Add Changes

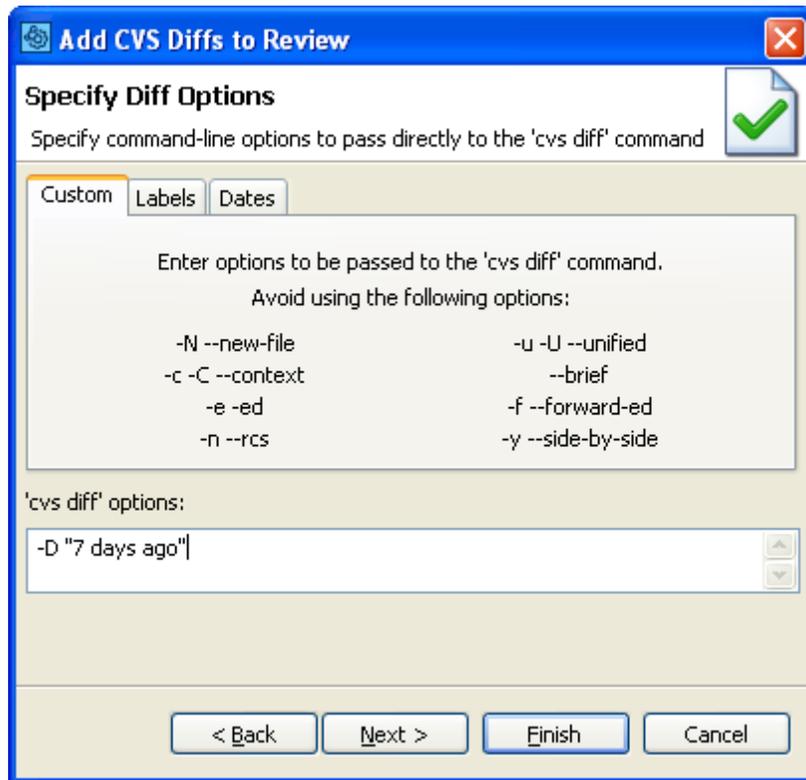
Press the *Add Changes...* button to upload modified files in a CVS checkout to the Collaborator Server for review.



Add Changes

Add CVS Diffs

Press the *Add CVS Diffs...* button to upload arbitrary CVS diffs to the Collaborator Server for review.

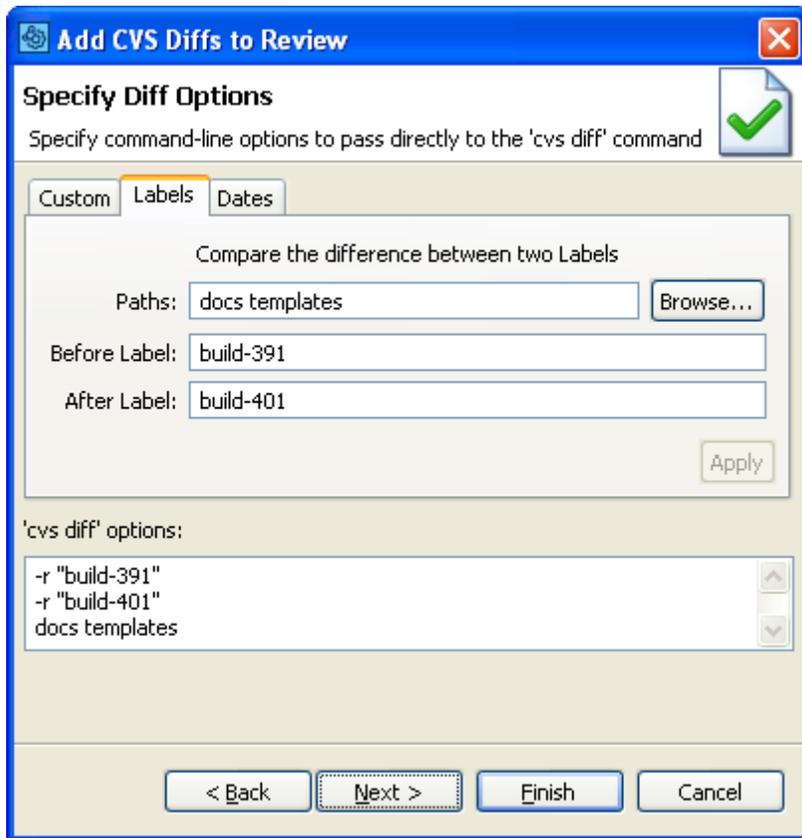


Add CVS Diffs

You can enter arbitrary CVS diff options, or compare the difference between two [Labels](#)^[557] or [dates](#)^[558].

6.2.1.1 Comparing two Labels

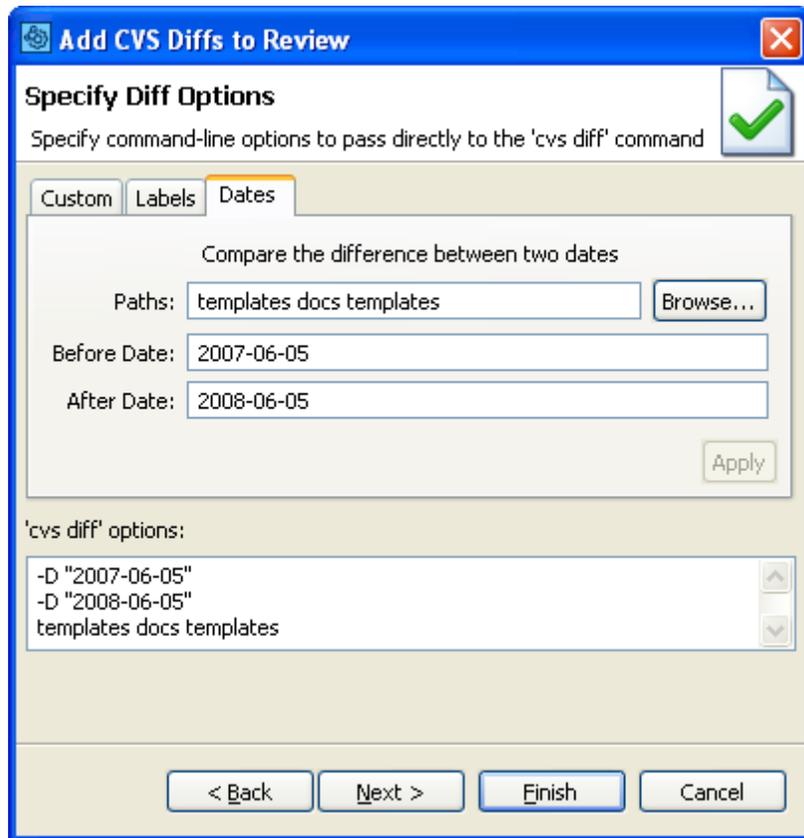
Press the *Add CVS Diffs...*^[557] button on the [main screen](#)^[436] and then select the *Labels* tab to upload the difference between two Labels.



Upload the difference between two Labels

6.2.1.2 Comparing two dates

Press the [Add CVS Diffs...](#)^[557] button on the [main screen](#)^[435] and then select the *Dates* tab to upload the difference between two dates.



Upload the difference between two dates

6.2.2 Command-Line Client

Commands recommended for CVS

[ccollab addchanges](#)^[560] - Attaches locally-modified files to a review

[ccollab addcvsdiffs](#)^[561] - Uploads diffs generated from cvs diff command

[ccollab commit](#)^[563] - Commit changes in the review

The [addchanges](#)^[560] command will upload local changes to files controlled by CVS before they are checked into version control.

Configuration

In most cases, the Command-Line Client can automatically detect your CVS configuration. Try [testing your configuration](#)^[446] to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your CVS configuration or you want to override the detected settings, you can manually specify CVS settings using [global options](#)^[457].

To manually configure the Command-Line Client to use CVS, execute the following command:

```
ccollab set scm[456] cvs
```

CVS-specific Options

Option	Description
<code>--cvs-exe <value></code>	Full path to the `cvs` command-line client
<code>--cvsroot <value></code>	Connection to the CVS repository

6.2.2.1 addchanges (for CVS)

Description

The `ccollab addchanges` command uploads locally modified files controlled by CVS to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchanges [--upload-comment <value>]
<review> <file-spec> [<file-spec> ...]
```

Command Options

Option	Required?	Description
<code>global-options</code>	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ^[455] .
<code>--upload-comment <value></code>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
<code><review></code>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.

Option	Required?	Description
<file-spec> [<file-spec> ...]	Yes	<p>Files to be added and/or folders to scan for modified files.</p> <p>Separate multiple file and folder names with spaces. If a file or folder name contains spaces, enclose this name in quotes.</p> <p>ccollab scans folders recursively. The resulting list includes the name of modified files. "Modifications" include include edits, additions, deletions, branches, integrations, moves, copies, and so on.</p> <p>After the scan is complete, a file list is presented in a graphical editor so you can review the files to be uploaded and make correct the list, if needed.</p>

Examples:

To create a new review and add all changes in the current directory and below, plus the file foo.txt, you would use:

```
ccollab addchanges new . foo.txt
```

To upload modified files from the current working directory and all subdirectories to review 123:

```
ccollab addchanges 123 .
```

To upload file foo.txt and modified files from c:\dev\project into a brand new review:

```
ccollab addchanges new foo.txt c:\dev\project
```

6.2.2.2 addcvsdiffs

Description

The **ccollab addcvsdiffs** command uploads differences between arbitrary versions of files in CVS. The differences are generated using the native 'cvs diff' command of CVS.

Command Line Syntax:

```
ccollab [global-options] addcvsdiffs [--upload-comment <value>]
<review> [<user-diff-arg> [<user-diff-arg> ...]]
```

Command Options

Option	Required?	Description
<code>--upload-comment <value></code>	No	Comment used to upload files (defaults to command-line arguments)
<code><review></code>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<code>-skipN</code>	No	Specifies whether to skip the <code>-N --new-file</code> argument of the <code>cvs diff</code> command. By default, the diffs generated by Collaborator contain information about new files. Use <code>-skipN</code> argument to generate diffs for already committed files.
<code><user-diff-arg> [<code><user-diff-arg> ...</code>]</code>	No	Command-line arguments to pass directly to the diff command

Remarks:

Do not use diff arguments that affect the diff output such as `'-u -U --unified'`, `'-c -C --context'`, `'--brief'`, `'-e -ed'`, `'-f --forward-ed'`, `'-n --rcs'`, or `'-y --side-by-side'`. The Collaborator command-line client will automatically select an output format that ensures you will get all the data you need on the server.

Examples:

To upload the changes between labels `build-391` and `build-401`:

```
ccollab addcvsdiffs review -skipN -r build-391 -r build-401
```

To upload the changes between dates `2006-01-01` and `2006-02-01`:

```
ccollab addcvsdiffs review -skipN -D 2006-01-01 -D 2006-02-01
```

To upload the changes in the last 7 days:

```
ccollab addcvsdiffs review -skipN -D "7 days ago"
```

6.2.2.3 commit (for CVS)

Description

The `ccollab commit` command submits the changes from a pre-commit review to source control. Be sure to include a relevant comment.

Command Line Syntax:

```
ccollab [global-options] commit [--comment <value>] [--dismiss-only]
[--force] <review>
```

Command Options

Option	Required?	Description
<code>--comment <value></code>	No	Comment for reviewed changes
<code>--dismiss-only</code>	No	Just dismiss the Action Item
<code>--force</code>	No	Ignore potential problems
<code><review></code>	Yes	Must be either an integer review-id, 'ask', or 'last'

Example:

```
ccollab commit 25 --comment "my code" --force
```

6.3 Git Integration

This section describes Collaborator integration with Git:

Git Server Integration

The Collaborator server can pull commits directly from your Git repository for review, without users needing to install any client programs.

GUI Client

The GUI Client can upload arbitrary Git diffs and provides a special user interface for specifying branches as diff arguments. The GUI Client can also upload local changes to files that have been added to the Git index.

Command-Line Client

The Command-Line Client can upload arbitrary Git diffs and changes to files that have been added to the Git index.

Supported Versions

Our integration uses your own installed Git command line client executable to generate differences for review. We require Git v1.7.4 or later.

Because we use client applications already present on your computer, we support all protocols, authentications, proxies, and other client configuration options you are currently using.

NOTE: If you intend to add unpushed commits, you must have an upstream tracking branch set. You can tell Git and Collaborator which upstream branch to compare against by running the command:

```
git branch --set-upstream [localbranch] [upstreambranch]
```

Submodule Support

Currently Collaborator clients ignore submodule changes when adding changelists or diffs from the super project. Unlike clients, server side [repository hosting integrations](#) ⁽⁷³⁵⁾ can display changes in the submodules of tracked repositories. So, to add the submodule differences you must either use repository hosting integration, or navigate into the submodule itself and add the files from there.

Technical Details and Limitations

Adding Git commits from GUI Client, Command-Line Client, Eclipse Plug-in or Visual Studio Extension will also add part of Git log information to build properly ordered list of changes on Collaborator server side. This will ensure that in Review Screen and Diff Viewer Git commits are displayed in the same order as in the Git log. To use this functionality you will need to update both server and clients to version 11.5 and later.

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you have "gaps" while adding subsequent atomic changelists (commits in terms of Git) to the same review. For example, add changelists 1, 2, and 4, but forget to add changelist 3.
- If you add changelists from different branches or repositories to the same review.
- If you add several diffs (non atomic changelists) to the same review.

6.3.1 Git Server Integration

The Collaborator server can be configured to communicate directly with a Git repository. This allows users to review commits completely from the browser, without having to install any client programs. To enable this feature, first install and configure a Git client on the Collaborator server and then create an entry for your Git repository in the [Version Control](#)¹⁹⁴ tab of the administration interface. Version control server entries are also created automatically if one of the client programs uploads files from a repository that does not match any of the currently configured servers.

Edit Git Configuration: Git	
Title:	<input type="text" value="Git"/>
Attach changelists from browser:	<input type="button" value="Disabled"/> <small>Allow users to attach committed changelists from this server to a review directly from the Web UI, without having to install any client programs.</small>
Git Executable:	<input type="text"/>
	<small>Full path to the 'git' command line client</small>
Git Repository:	<input type="text"/>
	<small>Full path to the Git repository</small>
<input type="button" value="TEST CONNECTION"/> <input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Title	The title is displayed to users, so it should be something that everyone will understand, even if they are going through proxies, VPNs, or other such things. When a version control server entry is created automatically, this is filled in with "Git".
Attach changelists from browser	If enabled, this feature lets users select commits to review directly from the web browser, without having to install any client programs.
Git Executable	Full path to the 'git' command line client
Git Repository	Full path to a Git repository. This is only necessary if you enable "Attach changelists from browser". The repository can be "bare".

Click the **Test Connection** to make sure Collaborator can contact your Git repository.

Client Configuration Mapping

You can supply [Java-style regular expressions](#) to map changelists from this Git repository uploaded from our client tools. It is important to set up these regular expressions so that files uploaded by the various Collaborator client tools are correctly associated with this server-side Git configuration.

Repository host Pattern:	.*
First commit hash Pattern:	.*
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Repository Host Pattern

Match on the client's configured remote origin URL (remote.origin.url). Note clients may have various network configurations that make the URL look different.

First Commit Hash Pattern

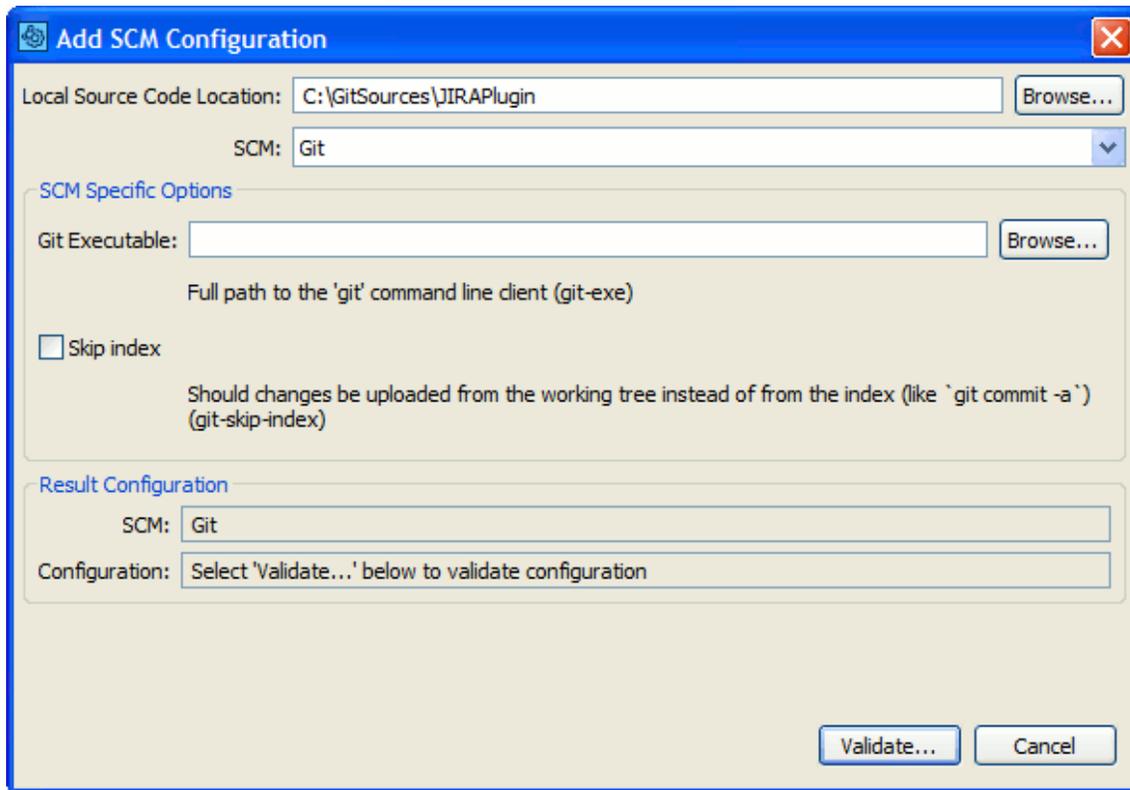
Match on the first commit hash returned from running "`git rev-list --max-parents=0 HEAD`".

6.3.2 GUI Client

Git Configuration in GUI Client

1. Start GUI Client.
2. Click **Add** to create a new **SCM configuration**.
3. In the subsequent SCM Configuration dialog⁴³⁷ dialog, specify the local source code location. For Git, this is not optional.
4. Select *Git* in the **SCM** drop-down list.
5. Several options will become available. These are specifically tailored to configure Git integration.

Option	Description
Git Executable	A full path referring the Git command line client (git.exe).
Skip index	Defines whether the changes you upload via the "Add Changes" command should be taken from the working tree (including not-yet-committed changes) instead of from the index. This is an analogue of the <code>git commit -a</code> command.



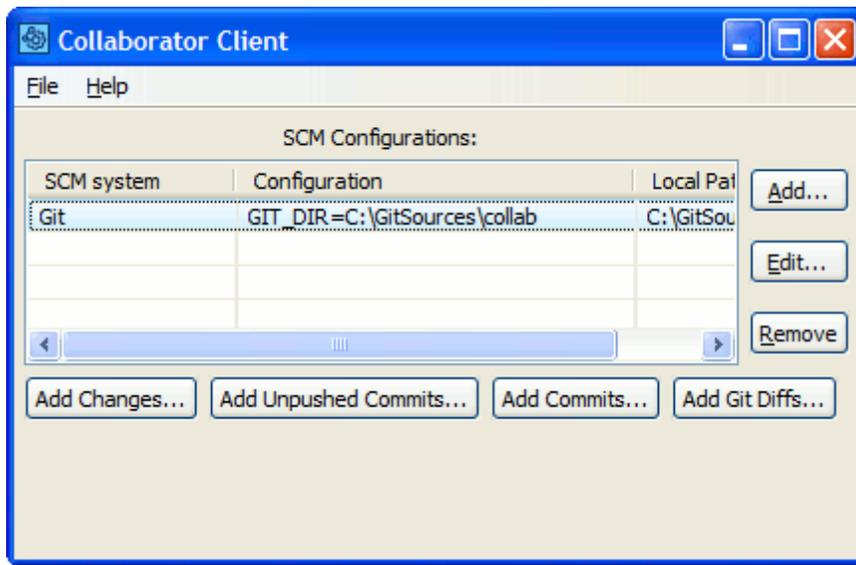
Configure client to work with Git

6. Once ready, click **Validate** to make sure the integration is operational.

After that, a new configuration for Git will appear on the main screen of the GUI Client.

Uploading files to a Review

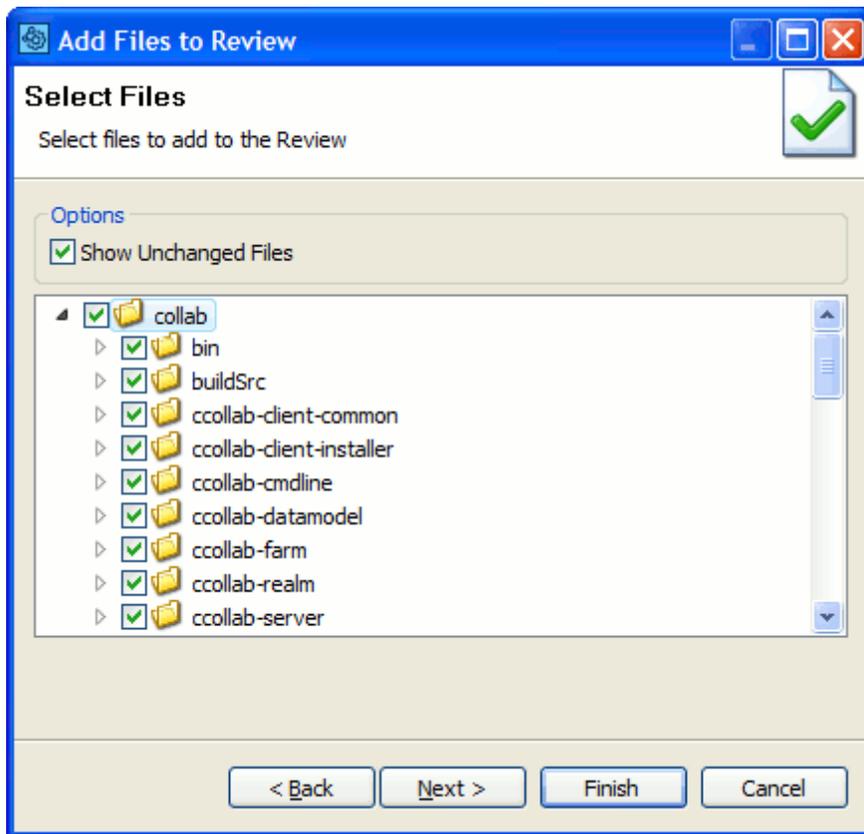
Selecting a Git SCM Configuration in the GUI Client main screen⁴³⁵ causes *Add to Review* buttons to appear.



Uploading Git files to a review

Add Changes

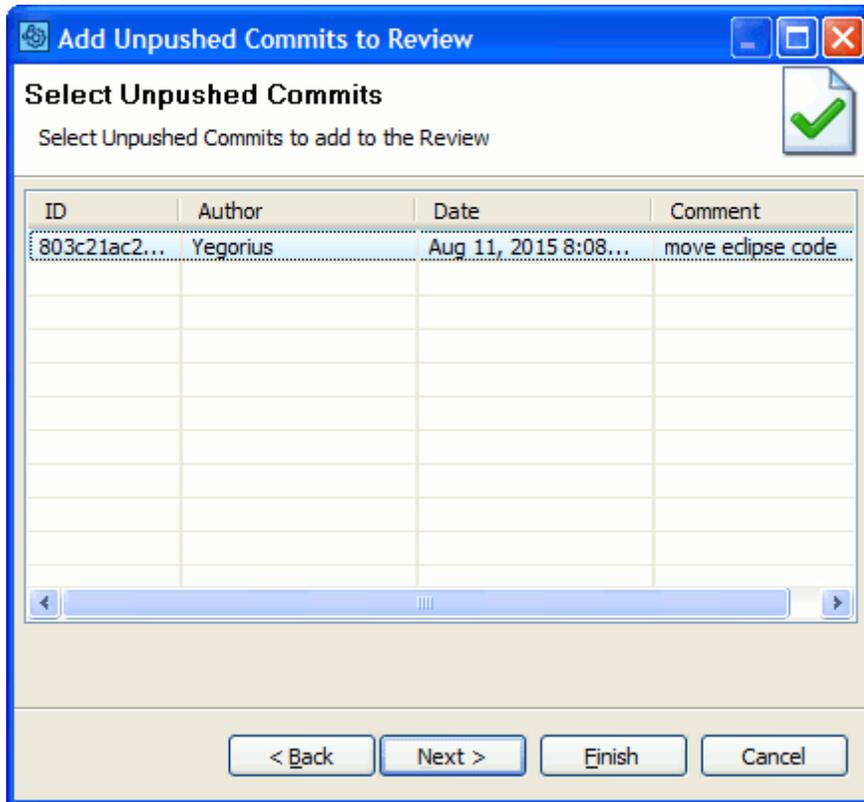
Selecting *Add Changes...* allows you to upload the modifications that are currently in the index. These are the modifications that would be committed if you typed 'git commit' from a command line.



Add Changes

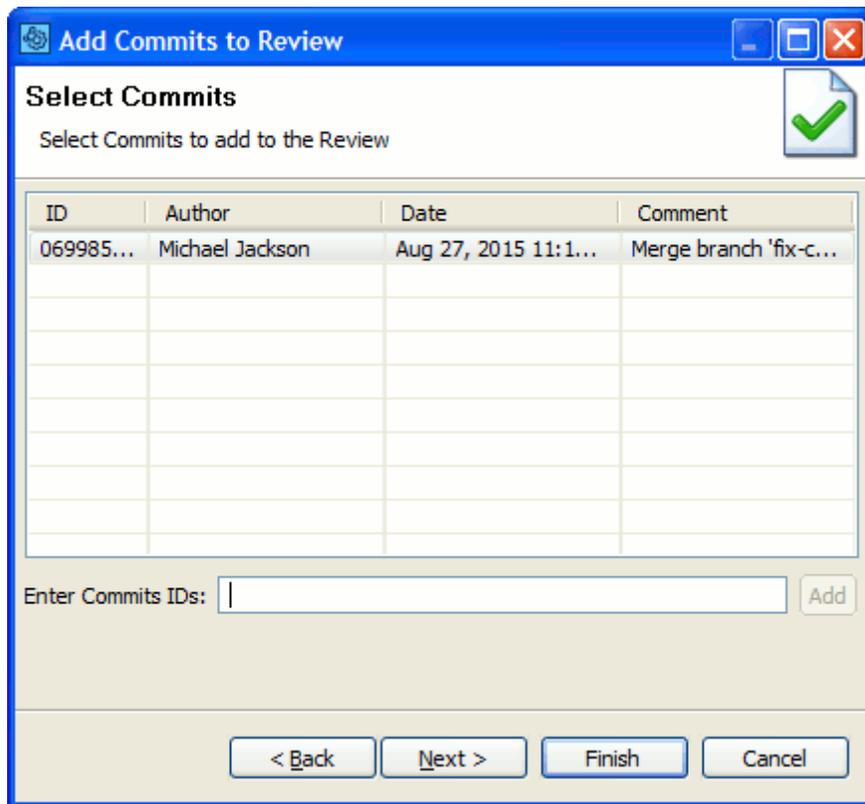
Add Unpushed Commits

Selecting *Add Unpushed Commits...* selects all commits in your local branch that have not been pushed to its tracking branch. NOTE: This assumes that you have set up branch tracking in Git. If you see an error when running *Add Unpushed Commits...* (like, "Error initializing local changelists") make sure that your current branch has a tracking branch set. You can set this up, initially by running "git config branch.autosetupmerge always". You can set this up on an existing branch by running "git branch --set-upstream name-of-branch name-of-upstream".



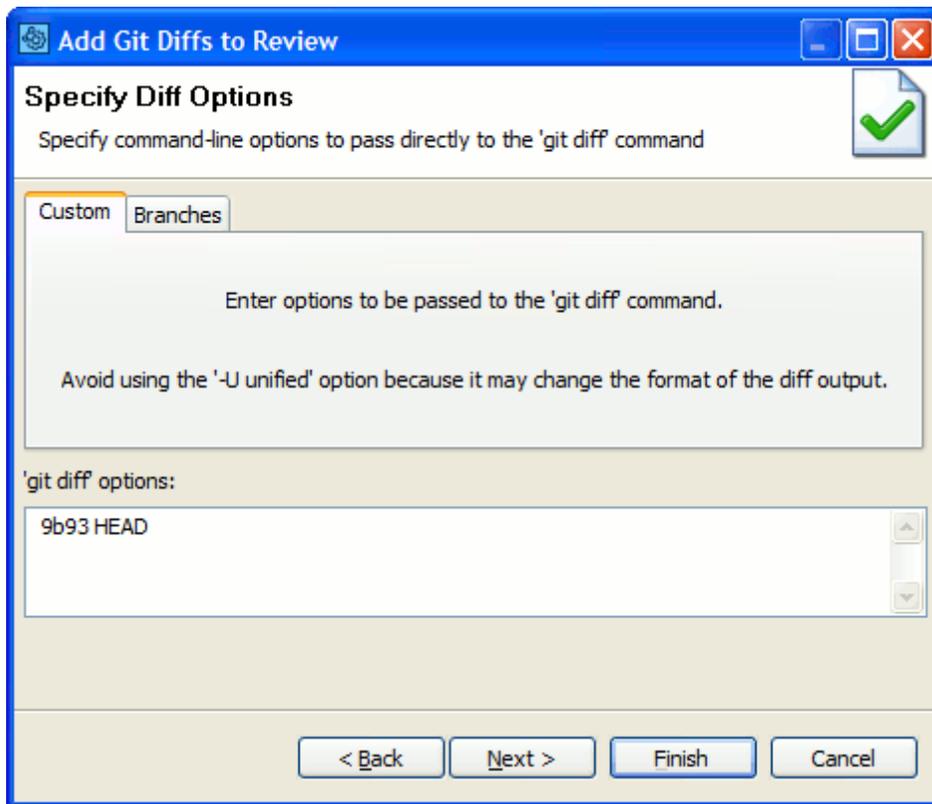
Add Commits

Selecting *Add Commits...* allows you to upload commits, whether they have been pushed or not. You can add a specific commit by adding the commit ID and clicking "Add":



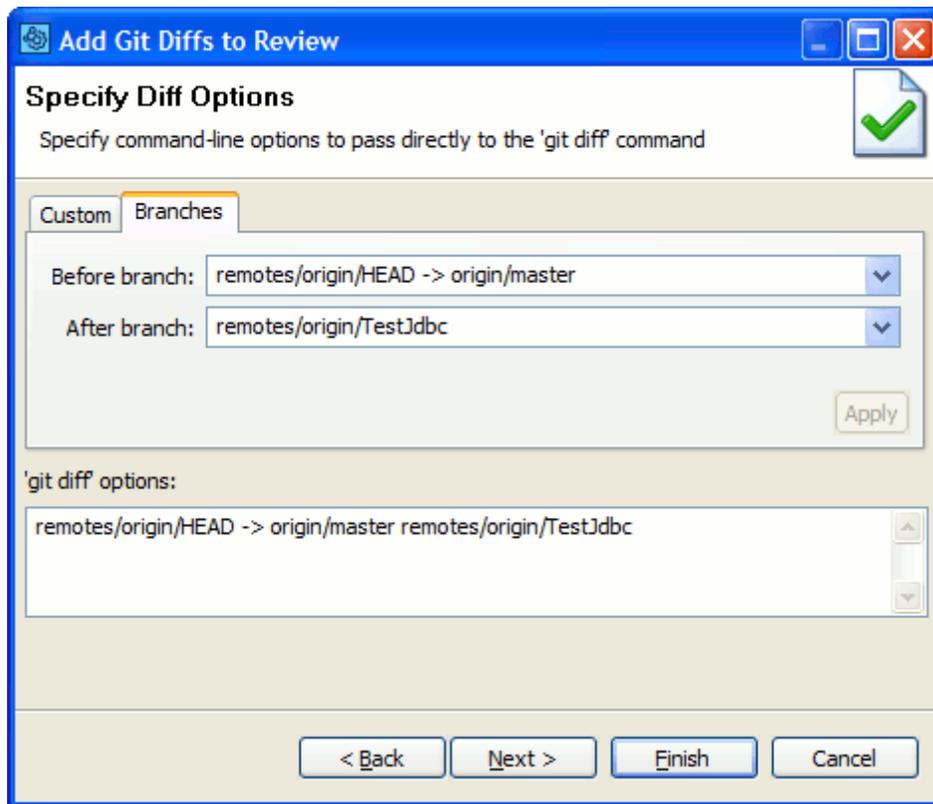
Add Git Diffs

Press the *Add Git Diffs...* button to upload arbitrary Git diffs to the Collaborator Server for review.



Upload arbitrary Git diffs

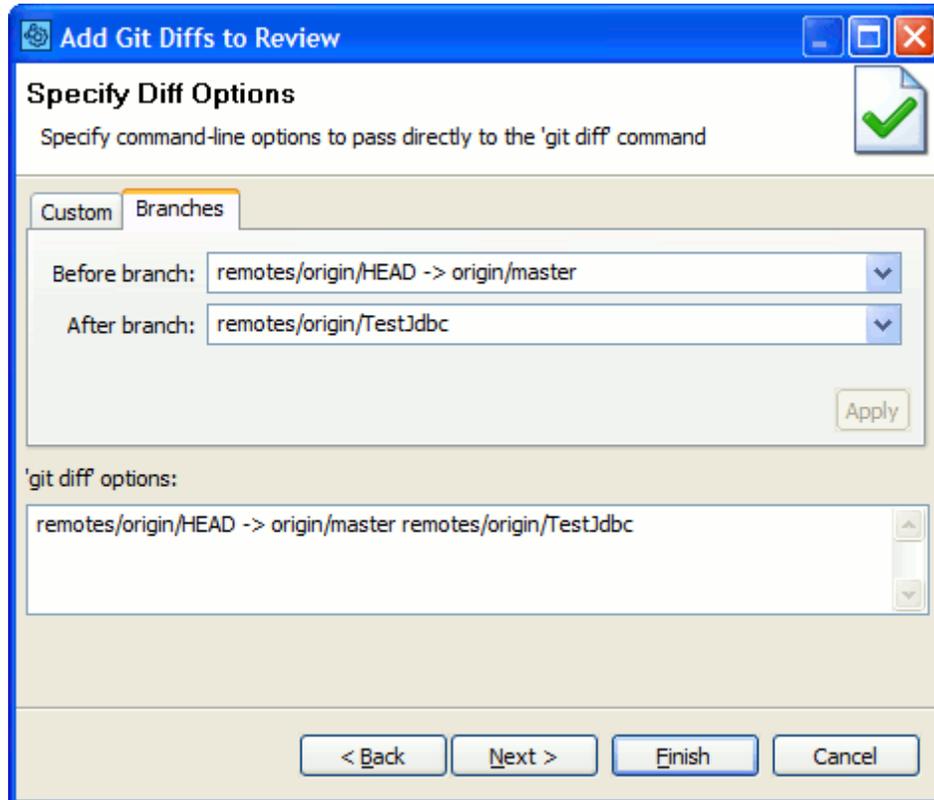
Press the *Add Git Diffs...* button and then click on the *Branches* tab to upload the differences between two branches to a review. Specify the branches by selecting from the *before* and *after* dropdown menus.



Upload the difference between two branches

6.3.2.1 Comparing two branches

Press the [Add Git Diffs...](#)^[566] button on the [main screen](#)^[435] and then select the *Branches* tab to upload the differences between two branches to a review. Specify the branches by selecting from the *before* and *after* dropdown menus.



Upload the difference between two branches

6.3.3 Command-Line Client

Commands recommended for Git

[ccollab addchanges](#)^[575] - Attaches locally-modified files to a review.

[ccollab addchangelist](#)^[577] - Attaches an atomic changelist to a review.

[ccollab addgitdiffs](#)^[577] - Uploads differences generated by git diff command.

[ccollab gitaddbranch](#)^[578] - Uploads all differences between the specified branch and the remote-tracking branch.

Configuration

In most cases, the Command-Line Client can automatically detect your Git configuration. Try [testing your configuration](#)^[446] to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your Git configuration or you want to override the detected settings, you can manually specify Git settings using [global options](#)^[456].

To manually configure the Command-Line Client to use Git, execute the following command:

```
ccollab set scm[456] git
```

Git-specific Options

Option	Description
<code>--git-exe <value></code>	Full path to the 'git' command line client
<code>--git-skip-index</code>	Defines whether the changes you upload via the <code>ccollab addchanges</code> command should be taken from the working tree (including not-yet-committed changes) instead of from the index. This is an analogue of the <code>git commit -a</code> command.

6.3.3.1 addchanges (for Git)

Description

The `ccollab addchanges` command uploads locally modified files controlled by Git to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchanges [--upload-comment <value>]
<review> <file-spec> [<file-spec> ...]
```

Command Options

Option	Required?	Description
<code>global-options</code>	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ^[455] .
<code>--upload-comment <value></code>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
<code><review></code>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<code><file-spec></code> <code>[<file-spec> ...]</code>	Yes	Files to be added and/or folders to scan for modified files. Separate multiple file and folder names with spaces. If a file or folder name contains spaces, enclose this name in quotes. <code>ccollab</code> scans folders recursively. The resulting list includes the name of modified files. "Modifications" include include edits, additions, deletions, branches, integrations, moves, copies, and so on. After the scan is complete, a file list is presented in a graphical editor so you can review the files to be uploaded and make correct the list, if needed.

Examples:

To create a new review and add all changes in the current directory and below, plus the file foo.txt, you would use:

```
ccollab addchanges new . foo.txt
```

To upload modified files from the current working directory and all subdirectories to review 123:

```
ccollab addchanges 123 .
```

To upload file foo.txt and modified files from c:\dev\project into a brand new review:

```
ccollab addchanges new foo.txt c:\dev\project
```

6.3.3.2 addchangelist (for Git)

Description

The `ccollab addchangelist` command attaches all files from an unpushed or committed Git changelist to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchangelist <review> <changelist>
[<changelist> ...]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or Git-specific global options. See Command-line Global Options Reference ^[455] .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<changelist> [<changelist> ...]	Yes	Identifier(s) of the desired changeset(s) in your source control.

Examples:

To upload Unpushed Commits 4321 and 7568 to a new review:

```
ccollab addchangelist new 4321 7568
```

To upload Commits 5432 and 12654 to review 111:

```
ccollab addchangelist 111 5432 12654
```

6.3.3.3 addgitdiffs

Description

The `ccollab addgitdiffs` command uploads differences between arbitrary versions of files in Git. The differences are generated using the native 'git diff' command of Git.

Command Line Syntax:

```
ccollab [global-options] addgitdiffs [--upload-comment <value>]
<review> [<git-diff-arg> [<git-diff-arg> ...]]
```

Command Options

Option	Required?	Description
--upload-comment <value>	No	Comment used to upload files (defaults to command-line arguments)
<review>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<git-diff-arg> [<git-diff-arg> ...]	No	Options which should be passed to the git diff command

Remarks:

Do not use diff arguments that affect the diff output such as '-U unified'. The Collaborator command-line client will automatically select an output format that ensures you will get all the data you need on the server.

Examples:

To upload all changes between the revision 8 revisions ago and the revision 4 revisions ago:

```
ccollab addgitdiffs review master~8 master~4
```

To upload all changes in your local working directory:

```
ccollab addgitdiffs review
```

6.3.3.4 gitaddbranch

Description

The `ccollab gitaddbranch` command uploads all differences between the given branch and the remote branch being tracked for changes.

Command Line Syntax:

```
ccollab [global-options] gitaddbranch <review> [<branch>]
[<upstream>]
```

Command Options

Option	Required?	Description
<review>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<branch>	No	Name of a branch whose changes should be added. Default is the current checkout branch.
<upstream>	No	Name of the remote-tracking branch to be compared against. If omitted Collaborator will try the default upstream branch (which was set via the git branch --set-upstream-to command-line key).

Examples:

To upload all differences between the "foo_feature" branch and the "origin/master" repository:

```
ccollab gitaddbranch new foo_feature origin/master
```

6.3.4 Git Server Hooks

The [ensure-review-started](#)^[580] and [ensure-reviewed](#)^[582] hooks ensure that files cannot be committed unless certain conditions are met. If a user attempts to commit files that do not meet those conditions, an error message describing the unfulfilled conditions will be displayed and the files will not be committed. If the conditions are met, the commit will be allowed to continue normally. The ensure-review-started hook requires that the review exist; ensure-reviewed requires that the review be completed.

If you are familiar with Gerrit (an open source Git-focused review package), you can implement a similar workflow for your engineering staff using Collaborator and Git triggers. Further information may be found on the SmartBear blog in the "Gerrit-Style Code Review with Collaborator" [post](#).

Linking reviews with commits

To use the `ensure-review-started`^[580] and `ensure-reviewed`^[582] hooks, you must require developers to put the review ID somewhere in the Git commit message. The format of this text is completely up to you; you will need to supply a [Java-style regular expression](#) that identifies this text and specifically calls out the review ID inside that text. The regular expression is specified using the `--review-id-regex` hook command option.

Here are some common ways of specifying the review ID and the corresponding regular expressions. Note that regular expressions are *case-insensitive* and you must *identify the review ID portion with parenthesis*:

Text	<code>--review-id-regex</code>
Review: 4233	<code>review:\s*(\d+)</code>
rID4233	<code>rid(\d+)</code>
(review 4233)	<code>\(review (\d+)\)</code>

This text can appear in-line with other text or in a more formal "form-style" layout. Because you control the regular expression, you can control exactly what this looks like.

For more information about Git hooks in general, see the [Git documentation](#).

6.3.4.1 `ensure-review-started` (for Git)

Description

Use the `ensure-review-started` trigger to ensure that a review for the specified changelist has been started. The trigger blocks the submit operation if there is no review for the changelist in Collaborator, and displays an error message telling that the changes need to be reviewed before submitting them to the Git repository.

Command Line Syntax:

```
ccollab [global-options] admin trigger ensure-review-started [--review-id-regex <value>] <changelist-id>
```

Command Options

Option	Required?	Description
<changelist-id>	Yes	The changelist identifier.
--review-id-regex <value>	No	A regular expression that identifies the review ID in the commit is comment.

Installation

To install this trigger you will typically create an update hook. If you already have an update hook, you can add our tool wherever it is appropriate; otherwise you will need to create an executable hook as described in the Git documentation. The update hook should iterate over the commits being pushed and call this trigger for each one of them, and then exit with a non-zero exit code if any of the trigger invocations failed.

Example shell script:

```
#!/bin/sh
refname="$1"
oldrev="$2"
newrev="$3"
for commit in `git rev-list $oldrev..$newrev -- ''`
do
  /collab/install/ccollab --url <collabUrl> --user <collabUser> --
  password <collabPasswd> --scm git admin trigger ensure-review-started
  $commit
  exitcode=$(( $exitcode + $? )
done
exit $exitcode
```

Note our use of "exit" to ensure that the hook script terminates with a non-zero exit code if our trigger rejects one of the commits.

6.3.4.2 ensure-reviewed (for Git)

Description

Use the `ensure-reviewed` trigger to ensure that the review that was created for the specified changelist has been completed by the time you submit the changelist to the Git repository. If the review has not been completed, the trigger blocks the submit operation and displays an error message informing the user about the problem.

Command Line Syntax:

```
ccollab [global-options] admin trigger ensure-reviewed [--review-id-regex <value>] <changelist-id>
```

Command Options

Option	Required?	Description
<changelist-id>	Yes	The changelist identifier.
--review-id-regex <value>	No	A regular expression that identifies the review ID in the commit is comment.

Installation

To install this trigger you will typically create an update hook. If you already have an update hook, you can add our tool wherever it is appropriate; otherwise you will need to create an executable hook as described in the Git documentation. The update hook should iterate over the commits being pushed and call this trigger for each one of them, and then exit with a non-zero exit code if any of the trigger invocations failed.

Example shell script:

```
#!/bin/sh
refname="$1"
oldrev="$2"
newrev="$3"
for commit in `git rev-list $oldrev..$newrev -- ''`
do
```

```

/collab/install/ccollab --url <collabUrl> --user <collabUser> --
password <collabPasswd> --scm git admin trigger ensure-reviewed
$commit
exitcode=$(( $exitcode + $? ) )
done
exit $exitcode

```

Note our use of "exit" to ensure that the hook script terminates with a non-zero exit code if our trigger rejects one of the commits.

6.4 IBM Rational ClearCase Integration

Topics of this section describe Collaborator integration with IBM Rational ClearCase.

ClearCase Server Integration⁵⁸⁵

To take advantage of ClearCase integration, configure the Collaborator server so that it communicates with a ClearCase repository directly, without any client software.

GUI Client⁵⁸⁷

The GUI Client can scan ClearCase for checked-out files and upload them before they are checked in⁵⁸⁹. It uploads changes from your activities⁵⁹⁰ or changes from an activity or activities that you name⁵⁹¹. It can also upload any versions of ClearCase files after they are checked in.

Command-Line Client⁵⁹⁶

The Command-Line Client can scan for checked-out files and upload them before they are checked in, upload any versions of ClearCase files after they are checked in, or upload UCM change sets for review.

Eclipse Plug-in

The Eclipse Plug-in⁴⁶⁴ integrates with the IBM Rational ClearCase SCM Adapter plug-in or with the open source ClearCase plug-in for Eclipse so you can upload⁴⁸⁴ locally modified files with full support from your ClearCase eclipse plug-in.

Supported Versions

Our integration uses your own ClearCase command-line client (`cleartool`) to communicate with the server. We support these versions:

- Rational ClearCase and Rational ClearCase LT, versions 4.1 through 9.x
- Rational ClearCase Remote Client (CCRC), version 9.x

Because we use client applications already present on your computer, we support all protocols, authentications, proxies, and other client configuration options you are currently using.

Support for ClearCase UCM

Collaborator supports ClearCase UCM activities. The change set associated with a ClearCase activity can be added to a review using the `Command-Line Client[445] addactivity[603]` command. For each file in the activity, the latest version in the activity and the predecessor of the earliest version in the activity are uploaded to the review.

A Note about ClearCase Activities

Uploading activities for review generates file differences based on [Multiple Version Changelists^{\[865\]}](#). Uploading activities is not supported by Rational ClearCase Remote Client.

Support for ClearCase Remote Client (CCRC 9.x only)

Collaborator integration with CCRC uses the Rational Change Management Server API. When running the Collaborator client installer, there is an edit field allowing you to select the location of the Rational CM API jar files on your system. The required files are:

- remote_core.jar
- stpcc.jar
- stpcmmn.jar
- stpwvcm.jar

These files are installed by the ClearCase Remote Client under the Rational Shared Resource Directory. The directory should look similar to one of the following:

```
C:\Program Files\IBM\IMShared\plugins\com.ibm.rational.teamapi_9.0.0.vNNNNNNNN, or  
/opt/eclipse/plugins/com.ibm.rational.teamapi_9.0.0.vNNNNNNNN
```

Launch Collaborator client installer with administrator privileges, find the location of the Rational CM API jar files on your system and specify it in the "CM API Directory" field during installation. The installer will copy the abovementioned jar files to the following subdirectory under the Collaborator client installation directory:

```
<Collaborator Client>/ui/plugins/com.smartbear.collaborator_12.1.xxxx
```

Thus the Collaborator client would become able to use the Rational Change Management Server API.

If using the RPM installer, you will have to manually copy these jar files to the correct subdirectory.

Once installed, create a ClearCase SCM configuration using the the same connection parameters to the ClearCase CM server as your ClearCase Remote Client. These are your username and password, and the ClearCase TeamWeb services URL. For example, if your ClearCase server host name is cc-server, the default server URL would be:

```
http://cc-server:16080/ccrc
```

Be careful to specify your connection parameters correctly. These parameters are not authenticated up front, instead calling back when server activity must take place. If the authentication is wrong, a cascade of errors can occur which can exhaust the RPC connections to the CM server.

Troubleshooting CCRC Views

ClearCase Remote Client views can get corrupted in a way that causes the CM API to generate exceptions when trying to upload CCRC files to a review. We do not know the cause of these exceptions, but selecting "Refresh->Repair->Vob Tag Directories" from the view context menu in the CCRC client, or deleting and recreating the view, fixes this condition.

Technical Details and Limitations

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you add several diffs (non atomic changelists) to the same review.

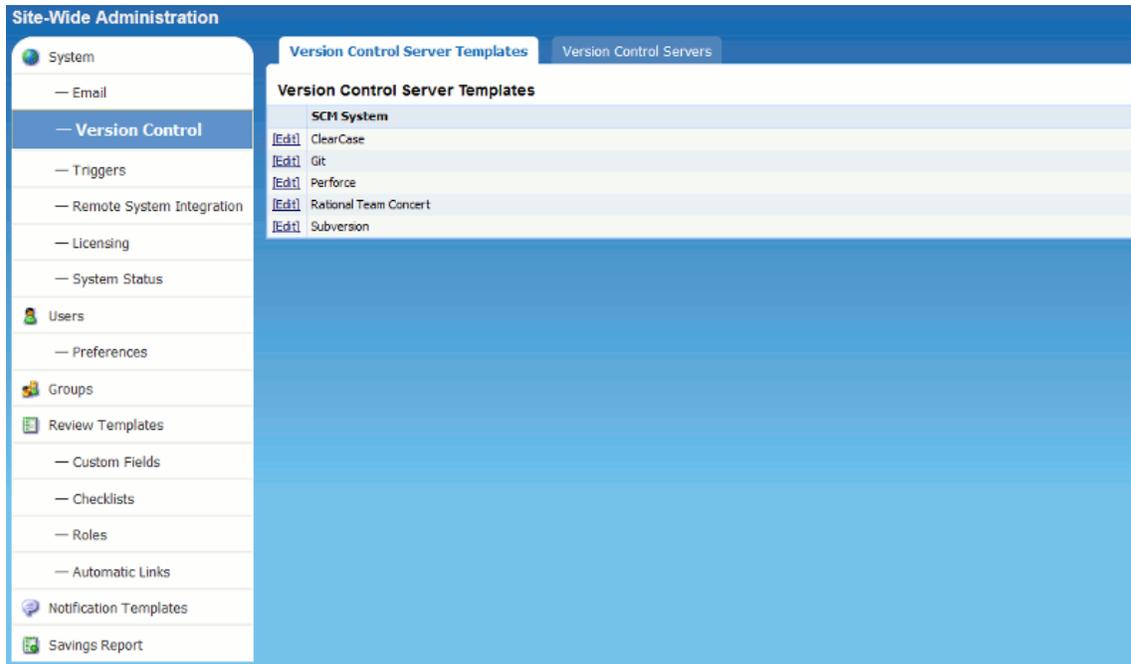
6.4.1 ClearCase Server Integration

The Collaborator server can be configured to communicate directly with a ClearCase repository. This allows users to review commits completely from the browser, without having to install any client programs.

To enable this feature:

1. Install and configure a ClearCase client on the Collaborator server.

- In Collaborator, click **Admin** on the home page and then select **Version Control** from the menu on the left:



- Add new ClearCase configuration repository to Collaborator. To do this, switch to **Version Control Servers** tab, in the **SCM System** drop-down list select "ClearCase" and click **Create**. The following edit form will appear. Enter your repository details there:

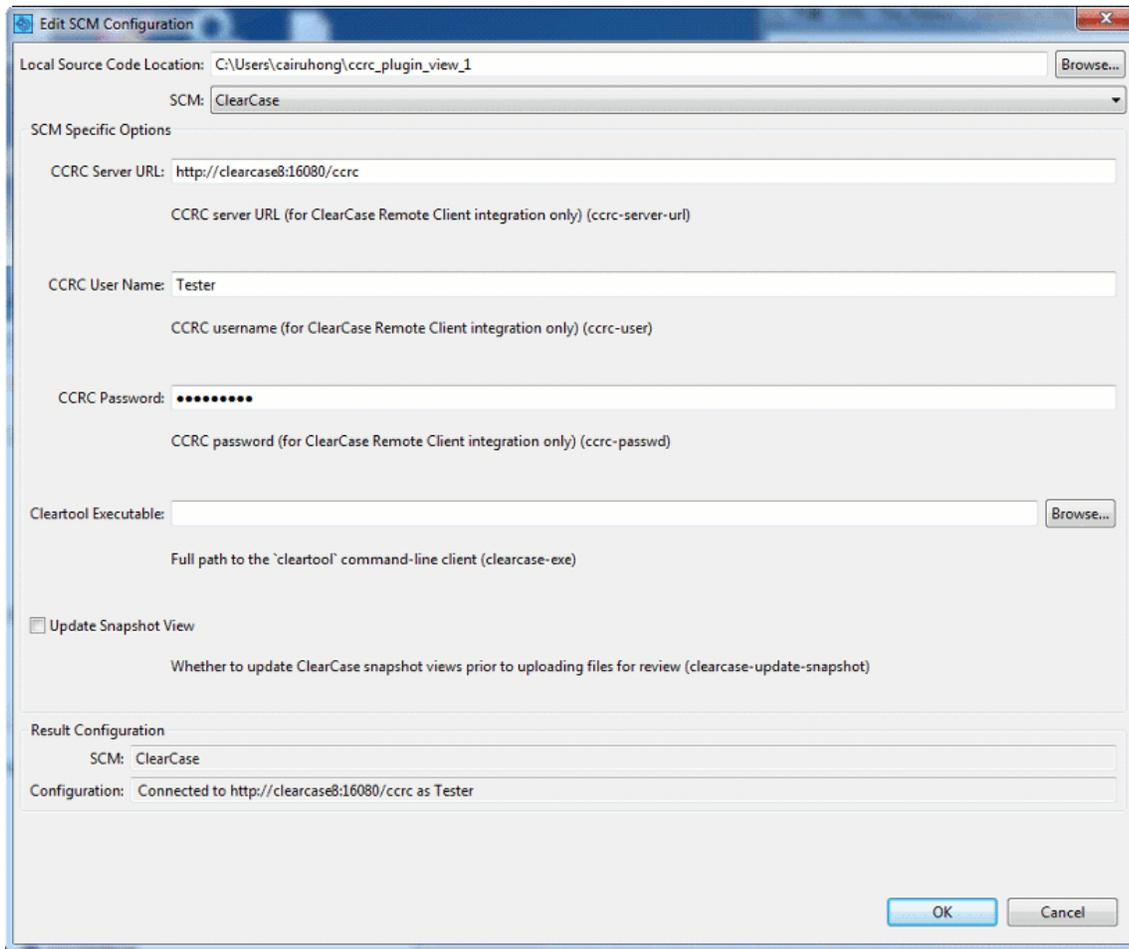
Version Control Server Templates		Version Control Servers	
Version Control Servers			
	Title		Type
[Edit] [Delete]	Untitled ClearCase Configuration		ClearCase
[Edit] [Delete]	SB Git Server Configuration		Git
[Edit] [Delete]	Jason's Perforce Server		Perforce
Edit ClearCase Configuration: Untitled ClearCase Configuration			
Title:	<input type="text" value="My ClearCase Configuration"/>		
Attach changelists from browser:	Enabled <input type="button" value="v"/>	Allow users to attach committed changelists from this server to a review directly from the Web UI, without having to install any client programs.	
Cleartool Executable:	<input type="text"/>		
	Full path to the 'cleartool' command-line client		
Update Snapshot View:	False <input type="button" value="v"/>	Whether to update ClearCase snapshot views prior to uploading files for review	
Clearcase View Path:	<input type="text" value="Z:\ucm_pvob"/>		
	Full path to the Clearcase view or vob directory		
<input type="button" value="TEST CONNECTION"/> <input type="button" value="SAVE"/> <input type="button" value="REVERT"/>			
Client Configuration Mapping			
These Java-style regular expressions map client-side ClearCase configurations (below) into this server-side ClearCase configuration. It is important to set up these regular expressions so that files uploaded by the various Collaborator Enterprise client tools are correctly associated with this server-side ClearCase configuration.			
Server host name Pattern:	<input type="text" value=".*"/>		
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>			

4. Save the changes.

6.4.2 GUI Client

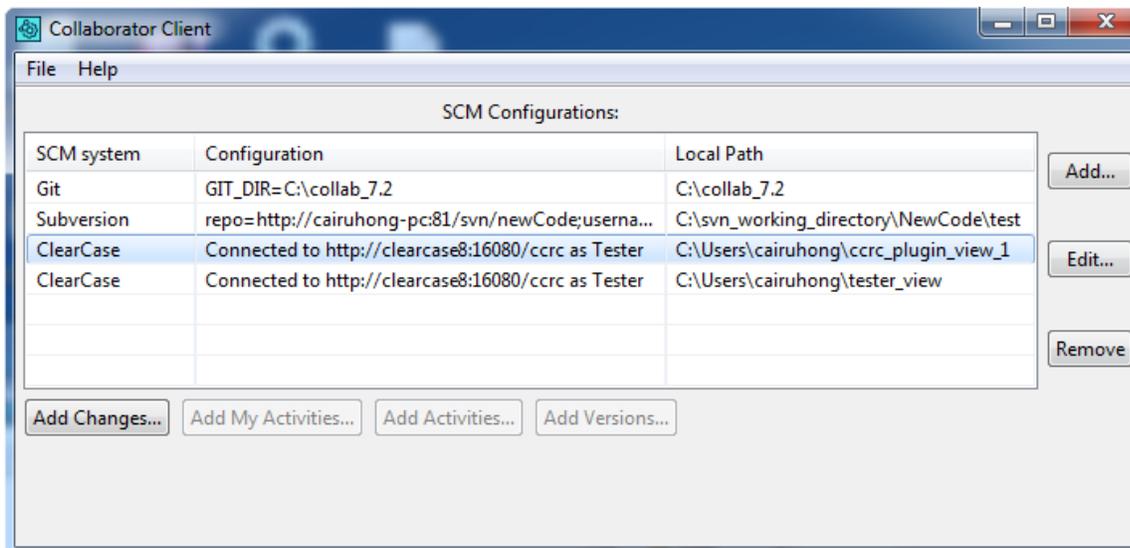
ClearCase-specific Options

The [SCM Configuration dialog](#) ^[437] has one ClearCase-specific option. Select the checkbox *Update snapshot view* if you want your ClearCase snapshot views to be updated prior to uploading files to a review.



Uploading files to a Review

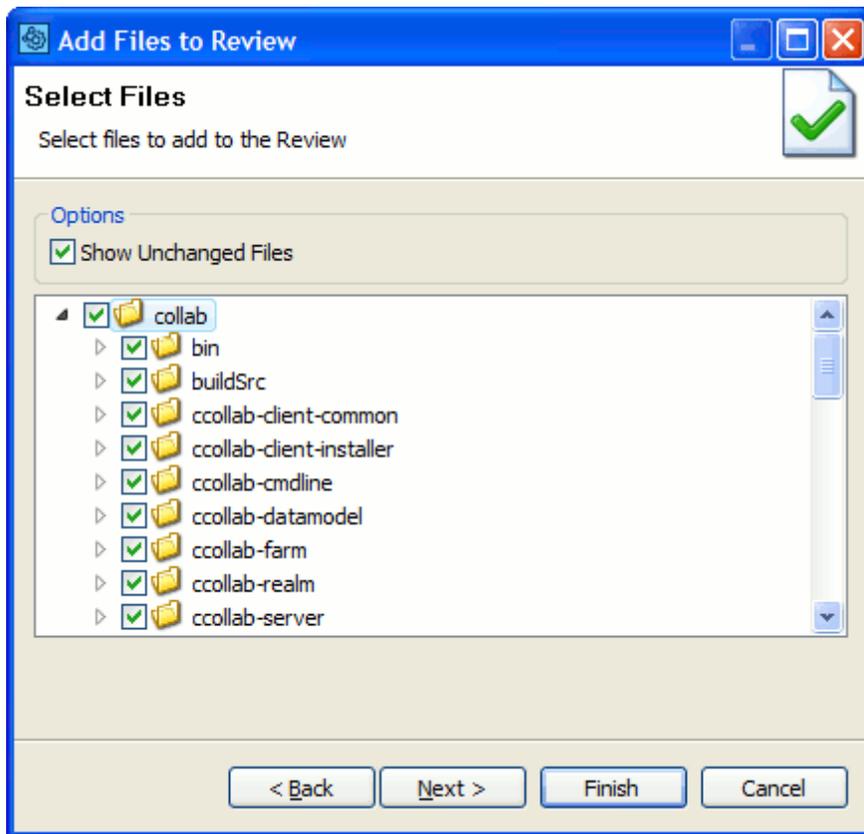
Selecting a ClearCase SCM Configuration in the GUI Client [main screen](#)^[435] enables several options for adding files for review. The [Add Changes...](#)^[589] button finds modified files or allows selection of unmodified files, for uploading to a review. The [Add My Activities...](#)^[590] button uploads changes from your activities. The [Add Activities...](#)^[591] button uploads changes from an activity or activities that you name. The [Add Versions...](#)^[591] button uploads arbitrary versions of files stored in ClearCase.



Uploading ClearCase files to a Review

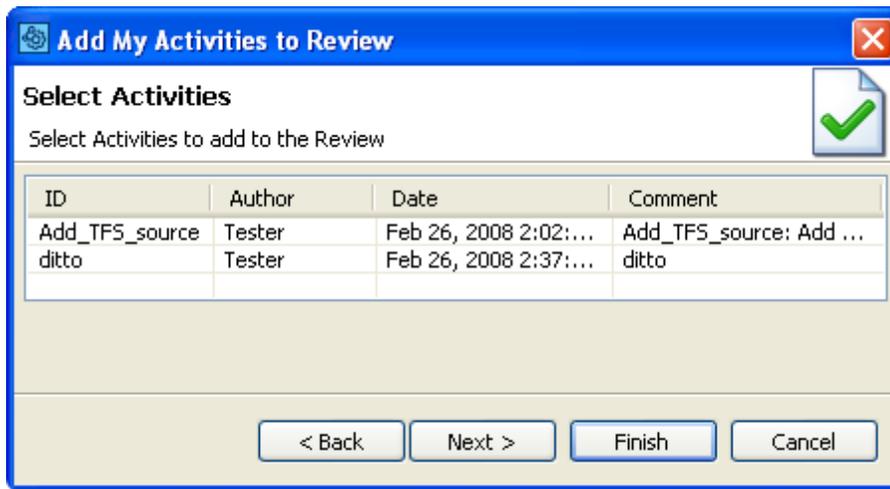
Add Changes

Press the *Add Changes...* button to upload checked-out files to the Collaborator Server for review.

*Add Changes*

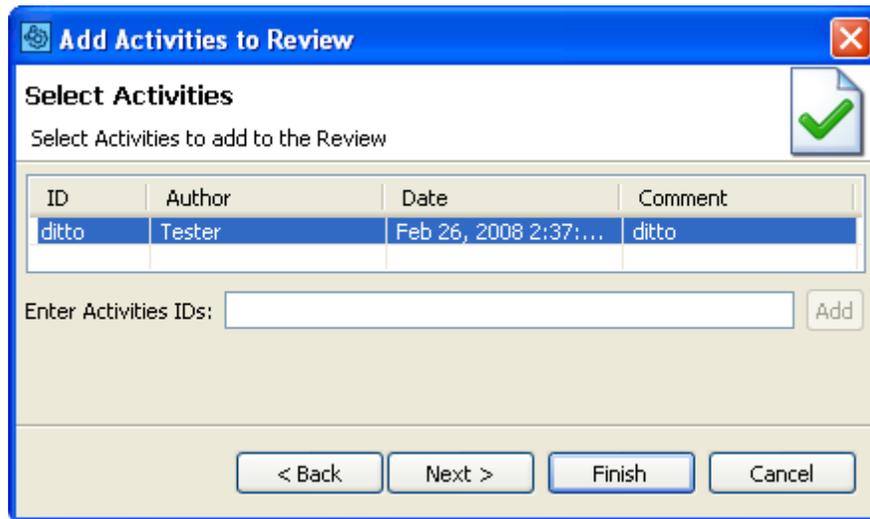
Add My Activities

Press the *Add My Activities...* button to upload files from selected activities which you own to the Collaborator Server for review.

*Add My Activities*

Add Named Activities

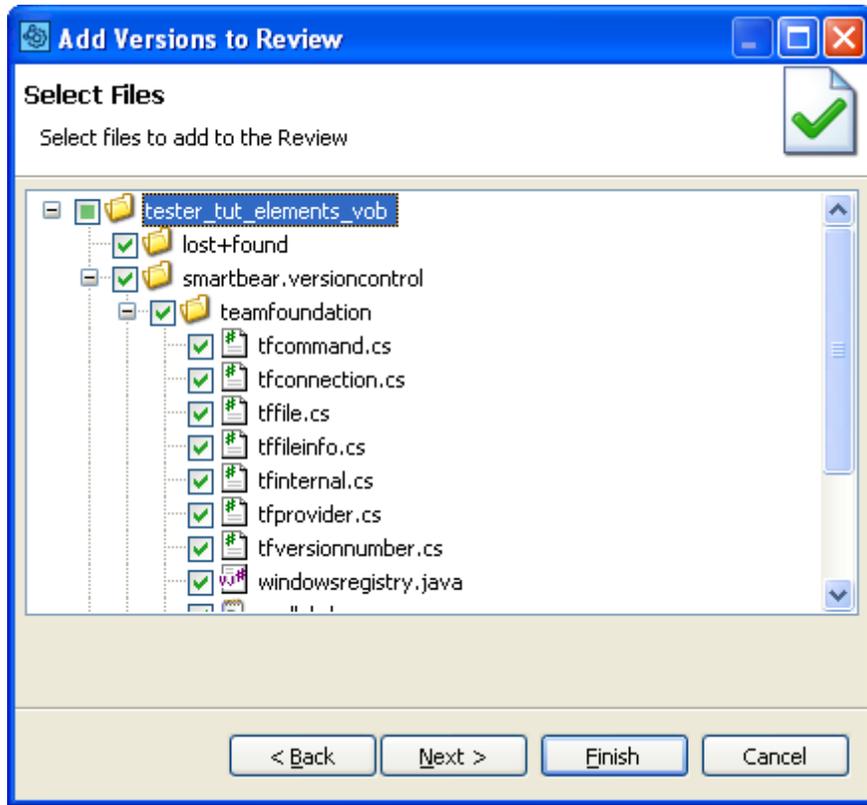
Press the *Add Activities...* button to upload changes from a named ClearCase activity to the Collaborator Server for review. You cannot upload activities that have CHECKEDOUT versions if you are not the activity owner.



Add Named Activities

Add Versions

Press the *Add Versions...* button to upload versions of files in your working copy to the Collaborator Server for review. Specify a name for the review or select an existing review and then click Next. You will be prompted to select one or more files in your checkout path (which was specified in the [SCM Configuration dialog](#))⁴³⁷.



Select files

Click Next. Do not press Finish yet.

Add Versions to Review

Specify file versions

Specify the before and after versions to add to the Review

Files	After	Before
<ul style="list-style-type: none"> [-] C:\clearcase_view\rcal_basic_work_not_ucm\work [-] Immutable.java [-] NotThreadSafe.java 		

Autofill After versions:

Autofill Before versions:

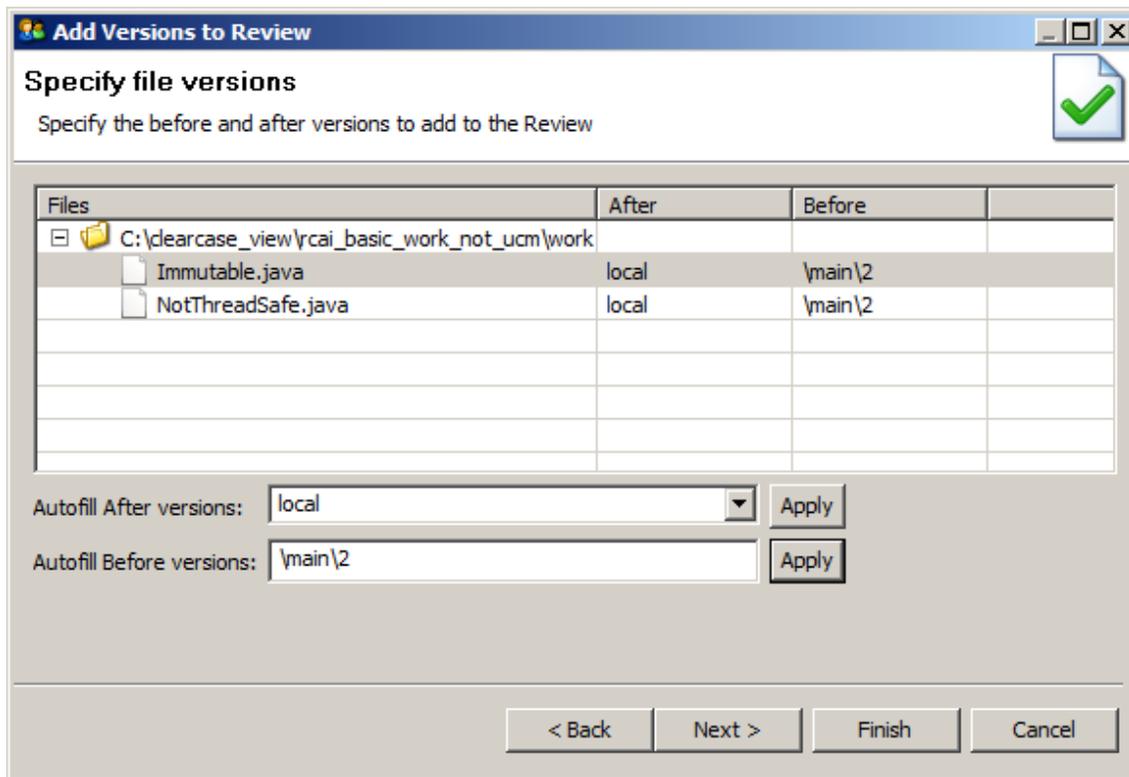
< Back Next > Finish Cancel

Specify versions

The next page of the wizard lists the files that you have selected. You need to specify which versions of these files should be added to the review.

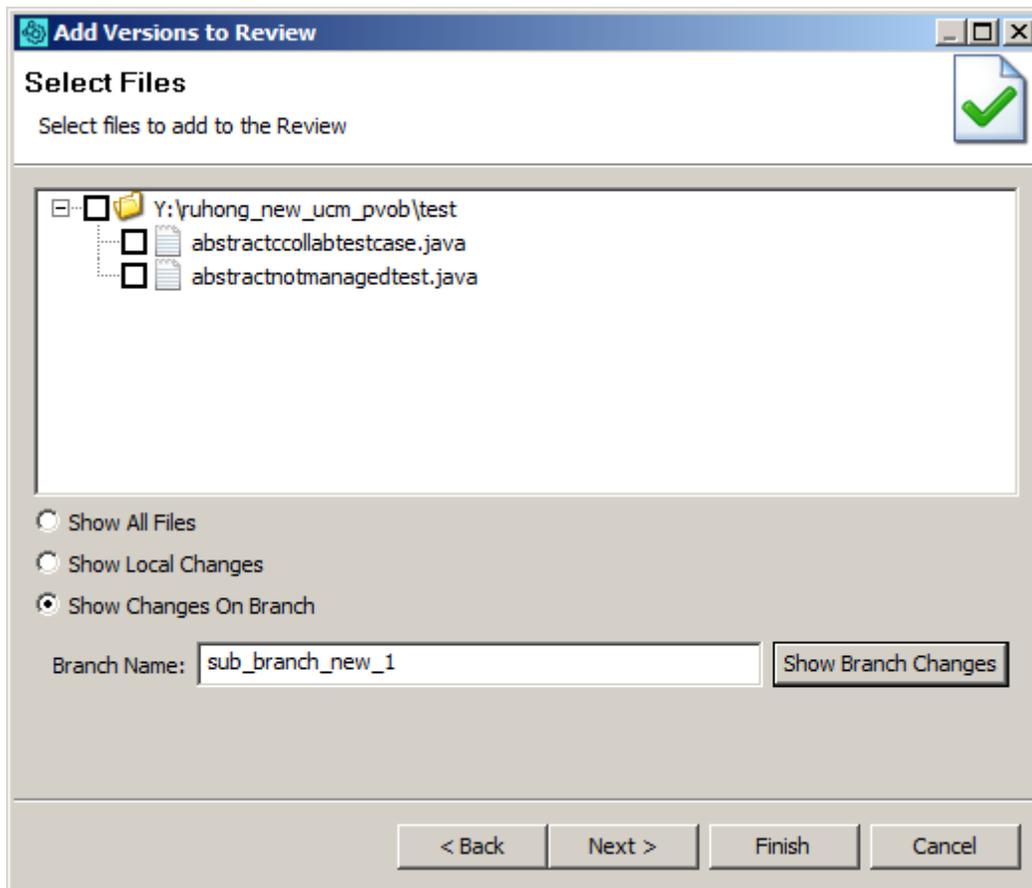
Enter the ClearCase versions of each file to Before and After columns. Rows corresponding to directories are not editable. To specify a ClearCase version you can use the 'local' and 'LATEST' keywords. To learn about these keywords, see [ccollab addversions](#) command-line reference.

To fill the before and after versions for all listed files automatically, specify the needed version in the Autofill After versions or Autofill Before versions edit boxes and click Apply. To clear previously specified versions for all listed files, enter empty string to the Autofill edit boxes and click Apply.



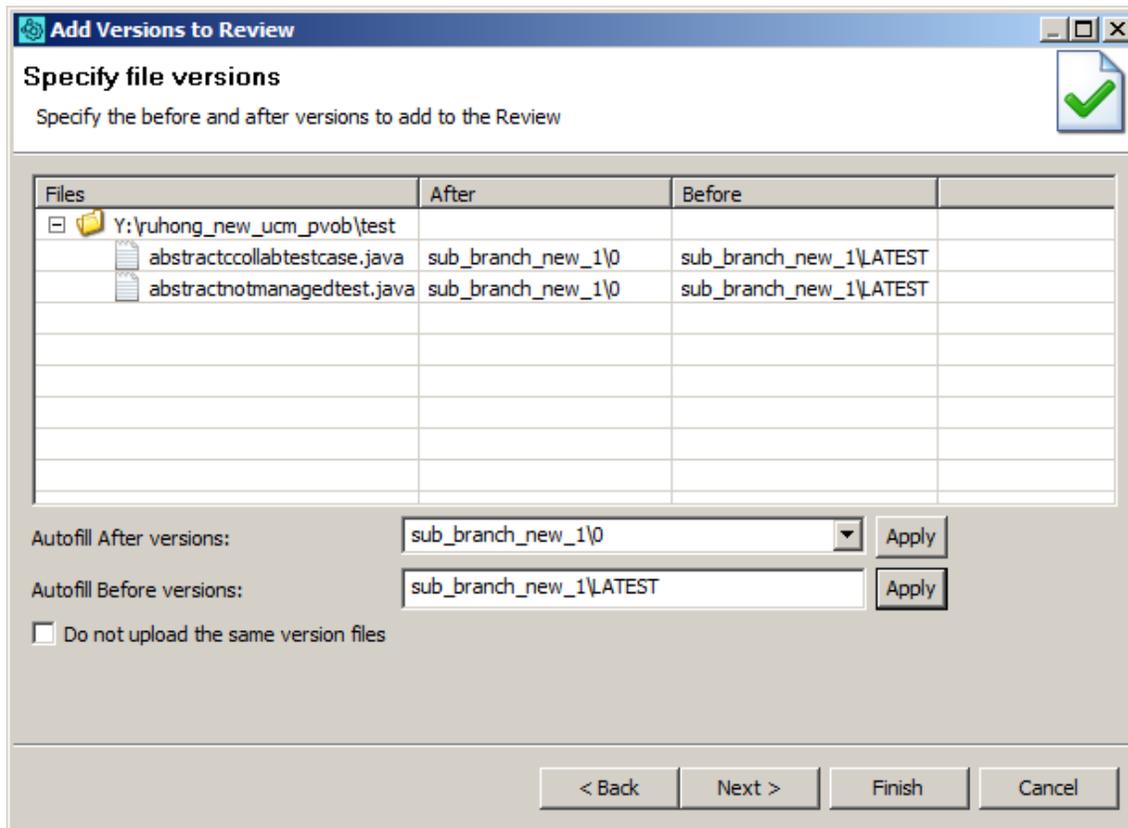
Automatically fill in before/after values

You can also specify a branch you want to work with:



Specifying branch name

You can input the absolute branch version path (for instance, "\\main\branch_new_1\sub_branch_new_1\1") or a relative path (like, "\\sub_branch_new_1\1").



6.4.3 Command-Line Client

Commands recommended for ClearCase

`ccollab addchanges`^[598] - Attaches locally-modified files to a review

`ccollab addchangelist`^[600] - Attaches an atomic changelist to a review

`ccollab addversions`^[601] - Attaches any 2 given versions to a review

`ccollab addactivity`^[603] - Attaches file versions in a ClearCase activity to a review

`ccollab commit`^[605] - Commit changes in the review

The `addchanges`^[549] command will scan for checked-out files and upload them before they are checked in.

There is an option for the `addchanges`^[598] command that allows local changes to be uploaded with a predecessor version in another branch as the previous version. The `--diffbranch`^[598] option is used for this:

```
ccollab addchanges --diffbranch branch-name review file-or-dir [file-or-dir] ...
```

For example, to create a new review and add all changes in the current directory and below, and compare them to the predecessor versions in the \main branch, you would use:

```
ccollab addchanges --diffbranch main new .
```

You can also use the special branch name pre to refer to the predecessor branch. For example, to add the local changes to hello.c compared to the most recent predecessor version in the previous branch to review 45, you would use:

```
ccollab addchanges --diffbranch pre 45 hello.c
```

The `addversions` command will upload arbitrary versions of ClearCase files after they are checked in.

The `addactivity`^[603] command will upload UCM change sets for review.

Configuration

In most cases, the Command-Line Client can automatically detect your ClearCase configuration. Try [testing your configuration](#)^[446] to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your ClearCase configuration or you want to override the detected settings, you can manually specify ClearCase settings using [global options](#)^[455].

To manually configure the Command-Line Client to use ClearCase, execute the following command:

```
ccollab set scm[456] clearcase
```

ClearCase-specific Options

Option	Description
<code>--ccrc-server-url <value></code>	CCRC server URL (for ClearCase Remote Client integration only)

Option	Description
<code>--ccrc-user <value></code>	CCRC username (for ClearCase Remote Client integration only)
<code>--ccrc-passwd <value></code>	CCRC password (for ClearCase Remote Client integration only)
<code>--clearcase-exe <value></code>	Full path to the `cleartool` command-line client
<code>--clearcase-update-snapshot</code>	Whether to update ClearCase snapshot views prior to uploading files for review

6.4.3.1 addchanges (for ClearCase)

Description

The `ccollab addchanges` command uploads locally modified files controlled by ClearCase to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchanges [--diffbranch <value>] [--upload-comment <value>] <review> <file-spec> [<file-spec> ...]
```

Command Options

Option	Required?	Description
<code>global-options</code>	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ⁴⁵⁵ .
<code>--diffbranch <value></code>	No	(ClearCase only) Specify either branch-name or "pre" to determine the earlier version for upload. See Remarks.
<code>--upload-comment <value></code>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
<code><review></code>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.

Option	Required?	Description
<file-spec> [<file-spec> ...]	Yes	<p>Files to be added and/or folders to scan for modified files.</p> <p>Separate multiple file and folder names with spaces. If a file or folder name contains spaces, enclose this name in quotes.</p> <p>ccollab scans folders recursively. The resulting list includes the name of modified files. "Modifications" include include edits, additions, deletions, branches, integrations, moves, copies, and so on.</p> <p>After the scan is complete, a file list is presented in a graphical editor so you can review the files to be uploaded and make correct the list, if needed.</p>

Remarks:

The '--diffbranch' option allows local changes to be uploaded with a predecessor version in another branch as the previous version.

For example, to create a new review and add all changes in the current directory and below, and compare them to the predecessor versions in the \main branch, you would use:

```
ccollab addchanges --diffbranch main new .
```

You can also use the special branch name 'pre' to refer to the predecessor branch. For example, to add the local changes to hello.c compared to the most recent predecessor version in the previous branch to review 45, you would use:

```
ccollab addchanges --diffbranch pre 45 hello.c
```

Examples:

To create a new review and add all changes in the current directory and below, plus the file foo.txt, you would use:

```
ccollab addchanges new . foo.txt
```

To upload modified files from the current working directory and all subdirectories to review 123:

```
ccollab addchanges 123 .
```

To upload file foo.txt and modified files from c:\dev\project into a brand new review:

```
ccollab addchanges new foo.txt c:\dev\project
```

6.4.3.2 addchangelist (for ClearCase)

Description

The `ccollab addchangelist` command attaches all files from a submitted ClearCase changelist (activity) to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchangelist <review> <changelist>
[<changelist> ...]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or ClearCase-specific global options. See Command-line Global Options Reference ^[455] .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<changelist> [<changelist> ...]	Yes	Identifier(s) or names of the desired activity (ies) in your source control.

Examples:

To upload Activities `add_new_scm_support` and `add_extended_version_parsing` to a new review:

```
ccollab addchangelist new add_new_scm_support
add_extended_version_parsing
```

To upload Activities `AnActivity` and `AnotherActivity` to review 111:

```
ccollab addchangelist 111 AnActivity AnotherActivity
```

6.4.3.3 addversions (for ClearCase)

Description

The `ccollab addversions` command appends the specified versions (revisions) of a file controlled by ClearCase on your computer to a review.

Command Line Syntax:

```
ccollab [global-options] addversions [--upload-comment <value>] [--version-spec <value> [<value> ...]] <review> [<file-path>]
[<version>] [<predecessor-version>]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ^[455] .
--upload-comment <value>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
--version-spec <value> [<value> ...]	No	<p>The version to be added to a review. A version-spec value consist of three components:</p> <p style="text-align: center;"><i>path version [previous-version],</i></p> <p>where <i>path</i> is the file name or server path of the file, <i>version</i> is the file version to be reviewed, and <i>previous-version</i> is an optional version, against which <i>version</i> should be compared.</p> <p>If any of these arguments contains spaces, enclose it in quotes.</p> <p>Typically a version-spec is not used in the command line. We recommend specifying the file and version using the <file-path>, <version> and the <predecessor-version> arguments (see below).</p>

Option	Required?	Description
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<file-path>	No	The path of the file whose versions are to be added to the review. If filename is omitted, entire directory will be added. Important: If you use this option, you should also specify <version> (see below).
<version>	No	Required, if <file-path> is specified. The version (revision) of the file to be added to the review. You can specify the keyword <i>local</i> to tell the command to use the local version of the file.
<predecessor-version>	No	Preceding file version to be added to the review. If you skip this argument, Collaborator will attempt to determine the preceding version based on the information from the source control.

Remarks

- If you skip the predecessor version, Collaborator will generate diffs using the predecessor version reported by your source control system.
- By default, the command lets you add versions of one file only. To add versions of multiple files, create a text file and specify this file in the command line as the standard input stream (stdin):

```
ccollab addversions last < versionlist.txt
```

Each line in the file must consist of the following components: *path version [predecessor-version]*.

For information on them, see description of the `version-spec` arguments.

- If you skip the file name and versions in the command line, the command will expect to read them from the standard input stream (stdin). Below are some examples for reading versions from the standard input:

```
ccollab addversions 86753
ccollab addversions last < versionlist.txt
cat versionlist.txt | ccollab addversions new
```

- When specifying the version in the command line or in an input file, you can use the keyword *local* to denote the version corresponding to the local version of the file. The *local* keyword can only be used for the first version argument, not for the predecessor version.

Examples:

Some examples of specifying versions on the command line for ClearCase:

```
ccollab addversions new ./hello.c /main/mydev/6 /main/8
ccollab addversions last ./Main.java /main/dev/31
```

To compare the local version of the ClearCase file/directory to a previous version in an edit list or input list, use 'local' as the initial version. If the file/directory is checked out as '/main/CHECKEDOUT', then 'local' is equivalent to using '/main/CHECKEDOUT' as the initial version. Otherwise 'local' would refer to the latest version of the file/directory. For example, if the local file hello.c is at version '/main/9' and has predecessor '/main/8' then all of the following lines would be equivalent:

```
./hello.c /main/9
./hello.c local
./hello.c /main/9 /main/8
./hello.c local /main/8
```

You can also reference a LATEST version, for example:

```
ccollab addversions new ./hello.c /main/ga_1.0/6 /main/LATEST
```

To upload a version with no predecessor version, use '/main/0':

```
ccollab addversions new ./hello.c /main/ga_1.0/6 /main/0
```

To compare the version "/main/2" of the directory "W:/user_name_ccrctut_pvob/server" to the version "/main/3", please run the following command and the difference will be uploaded to Collaborator.

```
ccollab addversions new W:/user_name_ccrctut_pvob/server /main/2 /
main/3
```

6.4.3.4 addactivity

Description

The `ccollab addactivity` command attaches file versions from one or more ClearCase activities to a review.

Command Line Syntax:

```
ccollab [global-options] addactivity [--diffintegration] [--upload-comment <value>] <review> <activity-name> [<activity-name> ...]
```

Command Options

Option	Required?	Description
<code>--diffintegration</code>	No	Use LATEST version from default integration stream, if available, as the predecessor version
<code>--upload-comment <value></code>	No	Comment used to upload files (default is "Local changes")
<code><review></code>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<code><activity-name> [<activity-name> ...]</code>	Yes	Specify one or more ClearCase activities by name, or use 'all' to include all activities in the current view

Remarks:

- For each file in the activity, the latest version in the activity and the predecessor of the earliest version in the activity are uploaded to the review.
- You can specify multiple activity names on the command line. You can also use the word 'all' as the activity name to include all activities in the current view. If multiple activities are given, the changeset uploaded is the union of all changes in each of the activities.
- You can use the `--diffintegration` option to include the default integration stream in determining version content for review. For the most recent version, this option will scan the versions of each file in the given activity as well as the versions of those files in any associated rebase activities, to determine the most recent version. For the previous version for each file in the activity, this option will use the LATEST version in the default integration branch (if available) as the previous version.
- IBM Rational ClearCase Remote Client (CCRC) does not support the `addactivity` command.

6.4.3.5 commit (for ClearCase)

Description

The `ccollab commit` command submits the changes from a pre-commit review to source control. Be sure to include a relevant comment.

Command Line Syntax:

```
ccollab [global-options] commit [--comment <value>] [--dismiss-only]
[--force] <review>
```

Command Options

Option	Required?	Description
<code>--comment <value></code>	No	Comment for reviewed changes
<code>--dismiss-only</code>	No	Just dismiss the Action Item
<code>--force</code>	No	Ignore potential problems
<code><review></code>	Yes	Must be either an integer review-id, 'ask', or 'last'

Example:

```
ccollab commit 25 --comment "my code" --force
```

6.5 IBM Rational Synergy Integration

This section describes Collaborator integration with Rational Synergy:

GUI Client ⁶⁰⁶

The GUI Client can upload Tasks into Collaborator. You can upload Pending ⁶⁰⁸ or Completed ⁶⁰⁹ Tasks

Command-Line Client ⁶¹⁰

The Command-Line Client can upload Tasks into Command-Line Client.

Supported Versions

Our integration uses your own Rational Synergy command-line client (ccm) to communicate with the server. The integration was developed against the Rational Synergy 7.1 toolset, and should work with the latest 6.x and 7.x releases.

Technical Details and Limitations

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you have "gaps" while adding subsequent atomic changelists (tasks in terms of Synergy) to the same review. For example, add changelists 1, 2, and 4, but forget to add changelist 3.

6.5.1 GUI Client

Rational Synergy-specific Options

The SCM Configuration dialog ⁴³⁷ has several Rational Synergy-specific options. These can be set as necessary to override Rational Synergy options derived from the environment.

Add SCM Configuration

Local Source Code Location (optional):

SCM: Rational Synergy

SCM Specific Options

ccm Executable:
Full path to the `ccm` command-line executable (ccm-exe)

Rational Synergy User Name:
User Name to use when starting a Rational Synergy session (ccm-user)

Rational Synergy Password:
Password to use when starting a Rational Synergy session (ccm-passwd)

Rational Synergy Engine Host:
Host the Rational Synergy Engine will run on (ccm-engine-host)

Rational Synergy Database Path:
Path of the Rational Synergy database to connect with (ccm-database-path)

Rational Synergy Local Database Path:
Path of the local Rational Synergy database, typically c:/temp/ccm or /tmp/ccm (ccm-local-database-path)

Remote Client
Start Rational Synergy sessions as a Remote Client (ccm-remote-client)

Result Configuration

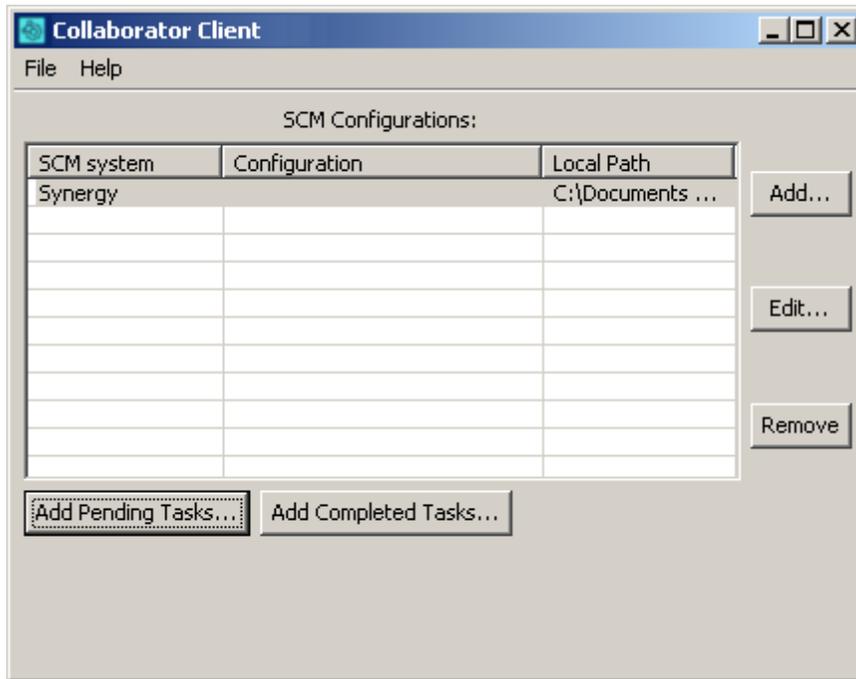
SCM: Rational Synergy

Configuration: Select 'Validate...' below to validate configuration

Synergy SCM Configuration

Uploading files to a Review

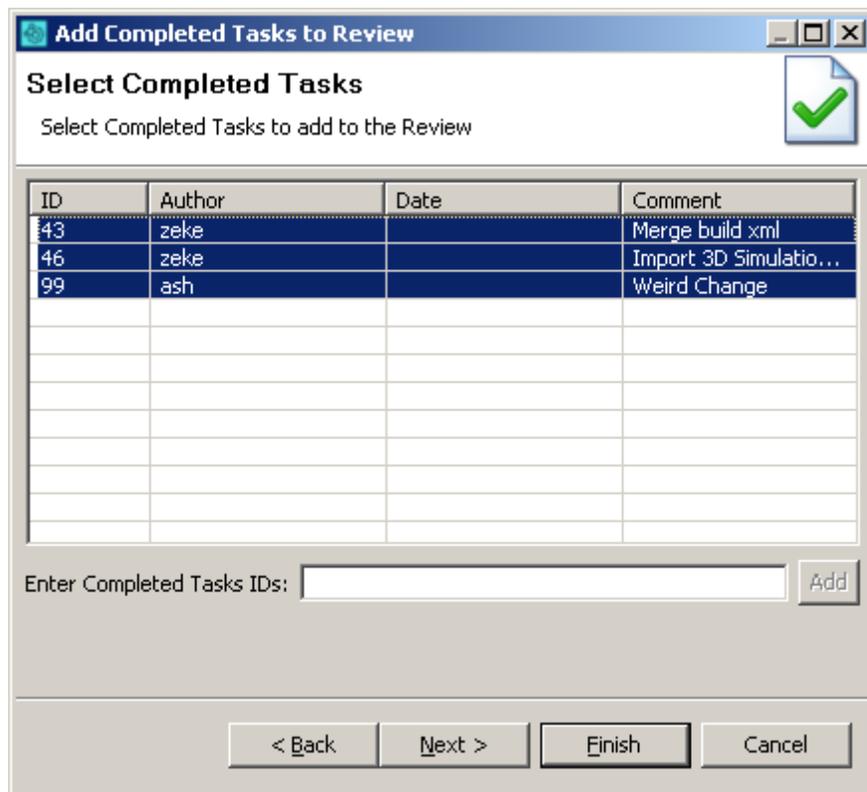
Selecting a Rational Synergy SCM Configuration in the GUI Client [main screen](#)^[435] causes several Add to Review buttons to appear. The [Add Pending Tasks...](#)^[608] button uploads pending changelists. The [Add Submitted Changelists...](#)^[686] button uploads submitted changelists.



Uploading Synergy Files to a Review

Add Pending Tasks

Press the *Add Pending Tasks...* button to upload the files in a pending Task to the Collaborator Server for review.



Add Rational Synergy Completed Task

6.5.2 Command-Line Client

Commands recommended for Rational Synergy

[ccollab addchangelist](#)^[611] - Attaches an atomic changelist to a review

[ccollab addversions](#)^[612] - Attaches any 2 given versions to a review

The [addchangelist](#)^[692] command will upload Rational Synergy tasks into Collaborator. You can upload tasks either before or after they are completed.

Configuration

The Command-Line Client may need some configuration. Try [testing your configuration](#)^[446] to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your Rational Synergy configuration or you want to override the detected settings, you can manually specify Rational Synergy settings using [global options](#)^[458].

To manually configure the Command-Line Client to use Rational Synergy, execute the following command:

```
ccollab set scm456 synergy
```

Rational Synergy-specific Options

Option	Description
<code>--ccm-exe <value></code>	Full path to the `ccm` command-line executable
<code>--ccm-user <value></code>	User Name to use when starting a Rational Synergy session
<code>--ccm-passwd <value></code>	Password to use when starting a Rational Synergy session
<code>--ccm-engine-host <value></code>	Host the Rational Synergy Engine will run on
<code>--ccm-database-path <value></code>	Path of the Rational Synergy database to connect with
<code>--ccm-local-database-path <value></code>	Path of the local Rational Synergy database, typically <code>c:/temp/ccm</code> or <code>/tmp/ccm</code>
<code>--ccm-remote-client</code>	Start Rational Synergy sessions as a Remote Client
<code>--ccm-server-url <value></code>	Server URL for Web-Mode Rational Synergy servers

6.5.2.1 addchangelist (for Rational Synergy)

Description

The `ccollab addchangelist` command attaches all files from a pending or a completed Rational Synergy changelist (tasks) to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchangelist <review> <changelist>
[<changelist> ...]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ^[455] .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<changelist> [<changelist> ...]	Yes	Identifier(s) of the desired changeset(s) in your source control.

The first argument is the review specifier, subsequent arguments are the IDs of the Pending Tasks or Completed Tasks to upload.

Examples:

To upload Pending Tasks 4321 and 7568 to a new review:

```
ccollab addchangelist new 4321 7568
```

To upload Completed Tasks 5432 and 12654 to review 111:

```
ccollab addchangelist 111 5432 12654
```

6.5.2.2 addversions (for Rational Synergy)

Description

The `ccollab addversions` command appends the specified versions (revisions) of a file controlled by Rational Synergy on your computer to a review.

Command Line Syntax:

```
ccollab [global-options] addversions [--upload-comment <value>] [--  
version-spec <value> [<value> ...]] <review> [<file-path>]  
[<version>] [<predecessor-version>]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ^[455] .
--upload-comment <value>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
--version-spec <value> [<value> ...]	No	<p>The version to be added to a review. A version-spec value consist of three components:</p> <p style="text-align: center;"><i>path version [previous-version],</i></p> <p>where <i>path</i> is the file name or server path of the file, <i>version</i> is the file version to be reviewed, and <i>previous-version</i> is an optional version, against which <i>version</i> should be compared.</p> <p>If any of these arguments contains spaces, enclose it in quotes.</p> <p>Typically a version-spec is not used in the command line. We recommend specifying the file and version using the <file-path>, <version> and the <predecessor-version> arguments (see below).</p>
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<file-path>	No	<p>The path of the file whose versions are to be added to the review. If filename is omitted, entire directory will be added.</p> <p>Important: If you use this option, you should also specify <version> (see below).</p>
<version>	No	<p>Required, if <file-path> is specified.</p> <p>The version (revision) of the file to be added to the review. You can specify the keyword <i>local</i> to tell the command to use the local version of the file.</p>

Option	Required?	Description
<predecessor-version>	No	Preceding file version to be added to the review. If you skip this argument, Collaborator will attempt to determine the preceding version based on the information from the source control.

Remarks

- If you skip the predecessor version, Collaborator will generate diffs using the predecessor version reported by your source control system.
- By default, the command lets you add versions of one file only. To add versions of multiple files, create a text file and specify this file in the command line as the standard input stream (stdin):

```
ccollab addversions last < versionlist.txt
```

Each line in the file must consist of the following components: *path version [predecessor-version]*.

For information on them, see description of the *version-spec* arguments.

- If you skip the file name and versions in the command line, the command will expect to read them from the standard input stream (stdin). Below are some examples for reading versions from the standard input:

```
ccollab addversions 86753
ccollab addversions last < versionlist.txt
cat versionlist.txt | ccollab addversions new
```

- When specifying the version in the command line or in an input file, you can use the keyword *local* to denote the version corresponding to the local version of the file. The *local* keyword can only be used for the first version argument, not for the predecessor version.

Example:

```
ccollab addversions new ./hello.c:csrc:1 3.2.5 3.2
```

6.6 IBM Rational Team Concert Integration

Collaborator integrates with Rational Team Concert allowing you to automatically synchronize the approver lists of Collaborator reviews and Team Concert work items, and automatically create reviews for change sets. Topics of this section provide detailed information on the integration.

In This Section

[Rational Team Concert Integration - Overview](#) ^[615]

Provides brief information on integration functionality and requirements.

[How Integration Features Work](#) ^[618]

Explains how the integration features work and how you can benefit from using them.

[Configuring Servers, Clients and Plug-Ins](#) ^[627]

Describes how to prepare Collaborator, Rational Team Concert, Eclipse and Visual Studio IDE in order for the integration features to work properly.

[Troubleshooting](#) ^[627]

Describes possible issues and typical solutions for them.

6.6.1 Overview

About Integration

Collaborator tightly integrates with Rational Team Concert. The integration helps you easily create reviews for Team Concert's work items, synchronize the list of reviewer participants and work item's approvers, and update the state attribute of users in the Approvals list automatically when the review status changes. For detailed information on the features, see [How Integration Features Work](#) ^[618].

Supported Versions

Collaborator 12.0 and later supports Rational Team Concert versions 6.0.5 - 6.0.6.1.

Collaborator 11.1 - 11.5 supports Rational Team Concert versions 4.x - 6.0.5.

If you have Rational Team Concert versions 2.x - 3.x, you will need to downgrade your Collaborator (both Server and Client components) to CodeCollaborator/PeerReview Complete version 6.5.x (as only these versions supported Java 5 required by RTC 2.x - 3.x).

For more details, see Version Compatibility Table section below.

Required Plug-Ins

The integration functionality is provided by two plug-ins:

- One of them is installed on the Rational Team Concert server machine (Collaborator Plug-In for Rational Team Concert Server).

- Another plug-in can be installed on client computers that have the Eclipse IDE (Collaborator Plug-In for Eclipse).

Both plug-ins can be downloaded from our web site:

<http://support.smartbear.com/downloads/collaborator/>

For information on installing and configuring the plug-ins and servers, see topics of the **[Configuring Servers, Clients and Plug-Ins](#)**^[627] section. We strongly recommend that you read it.

Version Compatibility Table

Different versions of Collaborator servers, Rational Team Concert servers and Eclipse IDEs require different versions of Java environment. To integrate Collaborator and Rational Team Concert you will need to install a specific version of Rational Team Concert server side plug-in **and** a specific version of Eclipse client side plug-in.

A table below lists the possible combinations:

Rational Team Concert Version	2.x - 3.x (Java 5)	4.x - 6.0 (prior to 6.0.1) (Java 6)	6.0.1 - 6.0.5 (Java 7)	6.0.5 - 6.0.6.1 (Java 8)
Collaborator Server Version				
6.5.x and earlier (Java 5)	RTC server: install 6.5.6511 plug-in Eclipse client: install 6.5.6511 plug-in	Incompatible	Incompatible	Incompatible
6.5.x - 8.4.8406 (Java 6)	Incompatible	RTC server: install 8.4.8406 plug-in Eclipse client: install 6.5.x - 8.4.8406 plug-in	Incompatible	Incompatible

8.5.8500 - 9.5.9501 (Java 7)	Incompatible	RTC server: install 8.4.8406 plug- in Eclipse client: install 8.5.8500 - 9.5.9501 plug- in	Incompatible	Incompatible
10.0.10000 - 11.0.11000 (Java 7)	Incompatible	Incompatible	RTC server: install 10.0.10000 - 11.0.11000 plug-in Eclipse client: install 10.0.10000 - 11.0.11000 plug-in	Incompatible
11.1.11100 - 11.2.11201 (Java 7)	Incompatible	RTC server: install 8.4.8406 plug- in Eclipse client: install 11.1.11100 - 11.2.11201 plug-in	RTC server: install 11.1.11100 - 11.2.11201 plug-in Eclipse client: install 11.1.11100 - 11.2.11201 plug-in	Incompatible
11.3.11300 - 11.5.11504 (Java 8)	Incompatible	RTC server: install 8.4.8406 plug- in Eclipse client: install 11.1.11100 - 11.2.11201 plug-in	RTC server: install java_7 plug-in Eclipse client: install java_8 or java_7 plug-in, depending on IDE requirement	Incompatible

12.0.12000 and later	Incompatible	Incompatible	Incompatible	RTC server: install java_8 plug-in Eclipse client: install java_8 plug-in
----------------------	--------------	--------------	--------------	----------------------------------------------------------------------------------------------

Technical Details and Limitations

Review Screen, Diff Viewer, Eclipse Plug-in and Visual Studio Extension display atomic changelists (changesets in terms of RTC) in chronological order (from older to newer), regardless the order in which they have been uploaded to review.

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you have "gaps" while adding subsequent atomic changelists (changesets in terms of RTC) to the same review. For example, add changelists 1, 2, and 4, but forget to add changelist 3.
- If you add changelists from different workspaces or streams to the same review.
- If you add several diffs (non atomic changelists) to the same review.

6.6.2 How Integration Features Work

Important: This topic describes how Collaborator integrates with Rational Team Concert and Eclipse. In order for the described integration features work, you need to configure the Rational Team Concert and Collaborator servers and clients properly. See [Configuring Servers, Clients and Plug-Ins](#)^[627].

[Creating Reviews Automatically](#)^[619]

[Creating Reviews From Eclipse Manually](#)^[619]

[Creating Reviews From Visual Studio Manually](#)^[622]

[Creating Reviews From Command-Line Client Manually](#)^[624]

[Synchronizing the Approvals and Participants Lists](#)^[625]

[Updating Approver State](#)^[626]

[Demonstration](#)^[627]

[Troubleshooting](#)^[627]

Creating Reviews Automatically

Collaborator's plug-in for Rational Team Concert tracks the changes of a work item state. If you change the state of a work item, the plug-in creates a review for that work item in Collaborator and attaches the changelist to this review. The plug-in also creates a review, if you add a changelist to a work item that has no changelist associated with it.

If a review was created in this way, Collaborator will track changes in the work item's Approvals list and update the review's Participants list appropriately. Also, you will see the status of a user work on the review in the **State** column of the Approvals list.

Note: The plug-in does not update a review if you update an existing changelist.

Requirements:

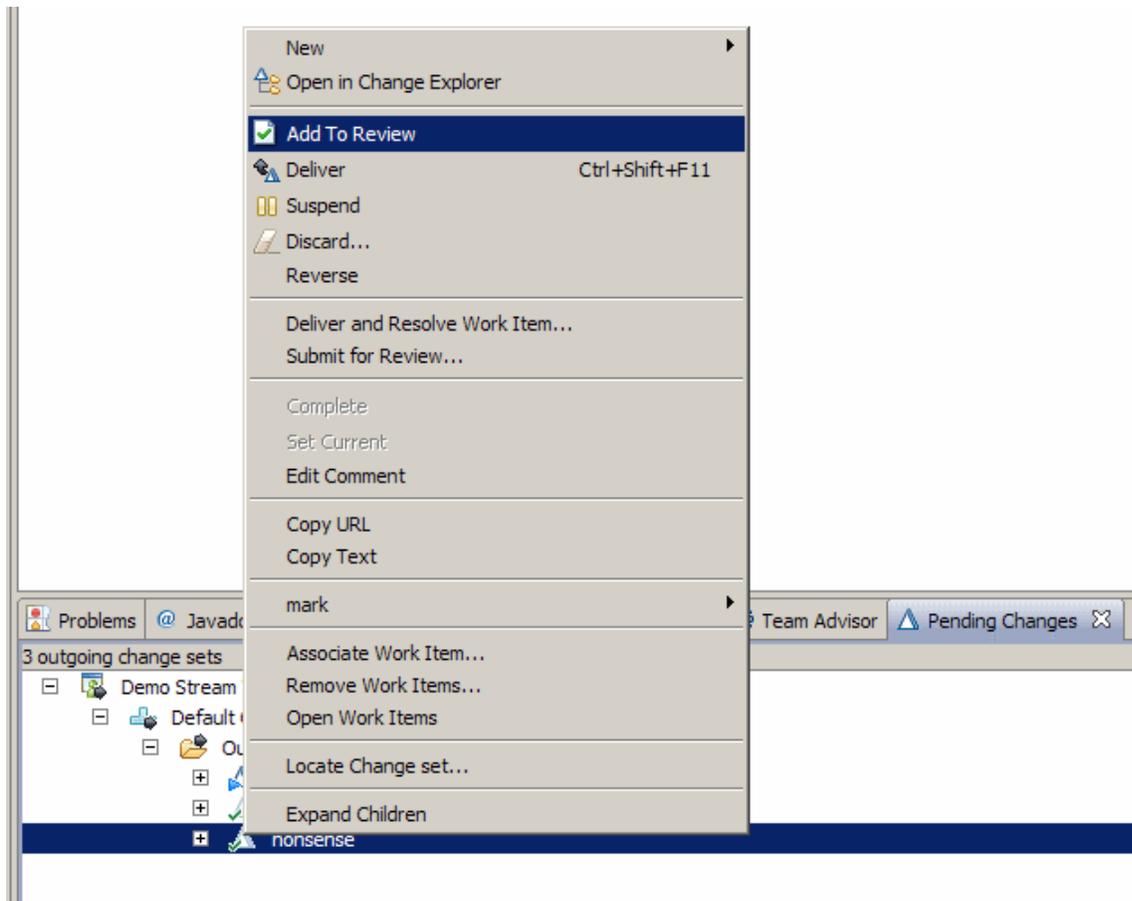
- To use automatic review creation, you need to --
 - [Configure](#)^[627] the Collaborator server.
 - [Install](#)^[632] and [configure](#)^[635] the Collaborator plug-in for Rational Team Concert.
 - [Set up](#)^[637] follow-up actions in Rational Team Concert.
- To take advantage of user list and state synchronization, you also need to [configure](#)^[627] the Collaborator server.

Creating Reviews From Eclipse Manually

Collaborator's Eclipse plug-in inserts new **Add To Review** items to the context menus of these views:

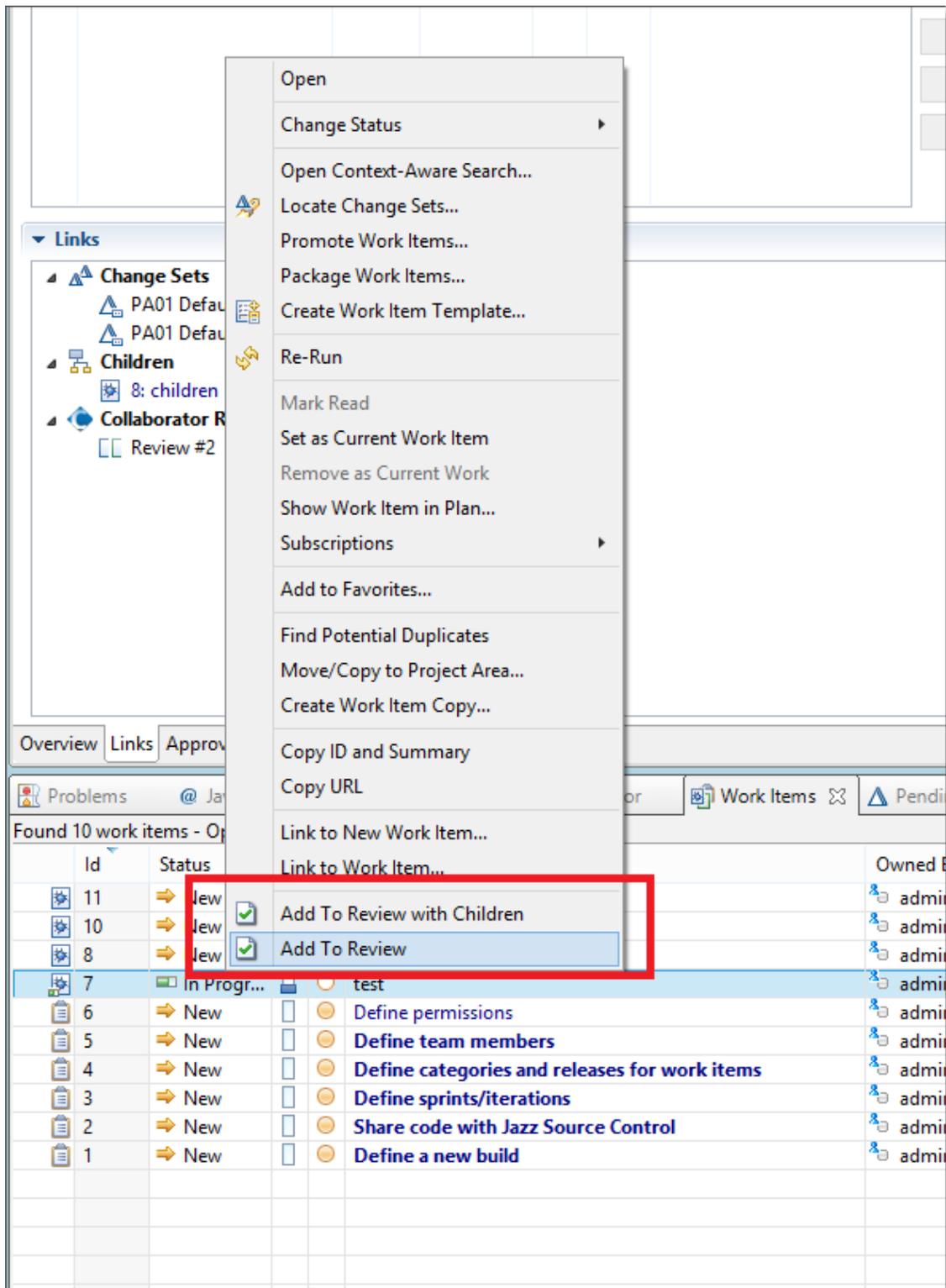
1. Pending changes view
2. History view
3. Work Items view

Right-click any item (for example, a changelist) on these views and select an **Add to Review** menu item. Follow instructions of the subsequent wizard to create a new review or add the changelist to an existing review.



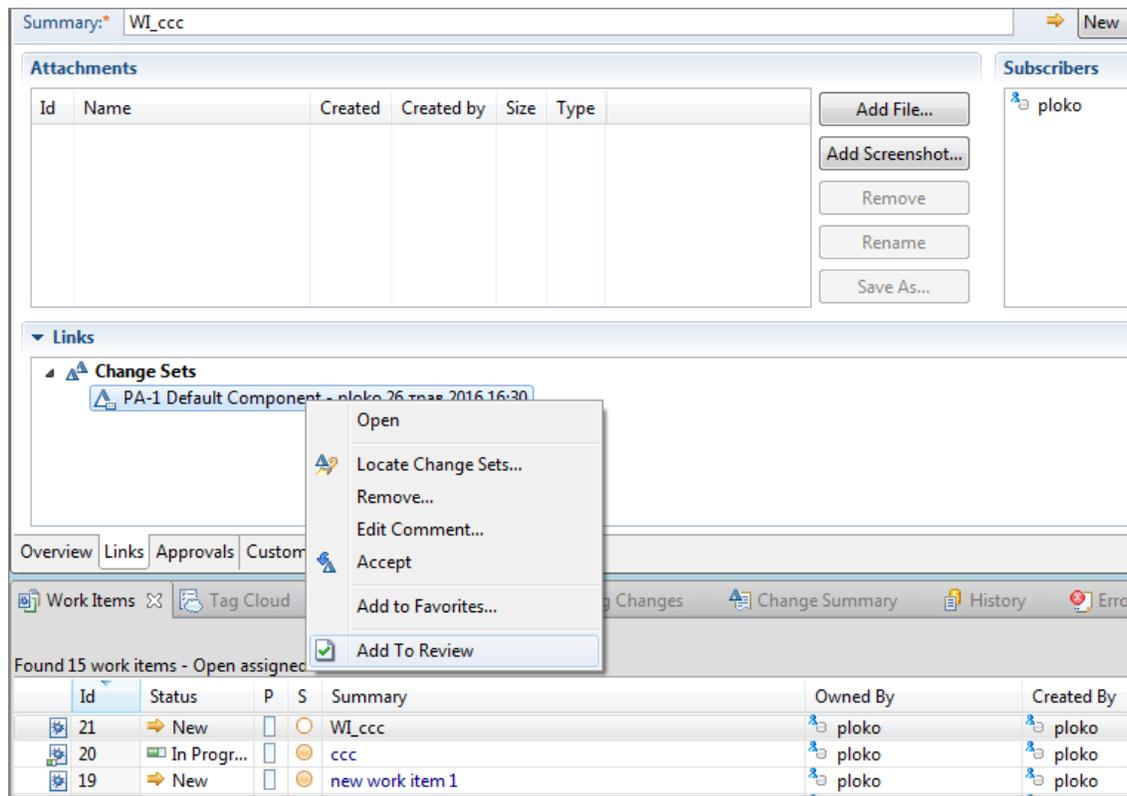
Creating a review from a changeset

On Work Items view, an **Add to Review with Children** menu item will also appear. When you use this function, the Collaborator will try to fetch changelist from selected Work Item and its children.



Creating a review from the Work Items context menu

Additionally, you can use an **Add to Review** function from the Links tab of the Work Items view.



Creating a review from the Links context menu

Note: You have to save the work item state before trying to add changelists to review.

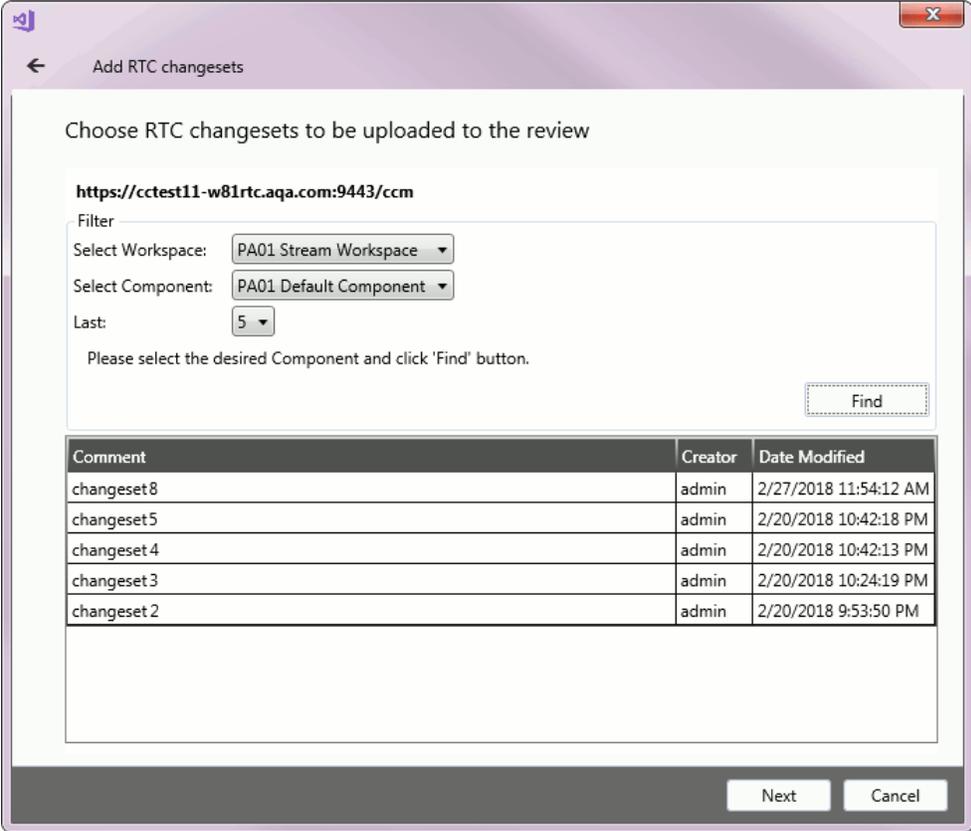
Requirements: to use this feature, you need to --

- [Configure](#)^[627] the Collaborator server.
- Have Rational Team Concert plug-ins installed into your Eclipse IDE.
- [Install](#)^[637] the Collaborator plug-in for Eclipse.

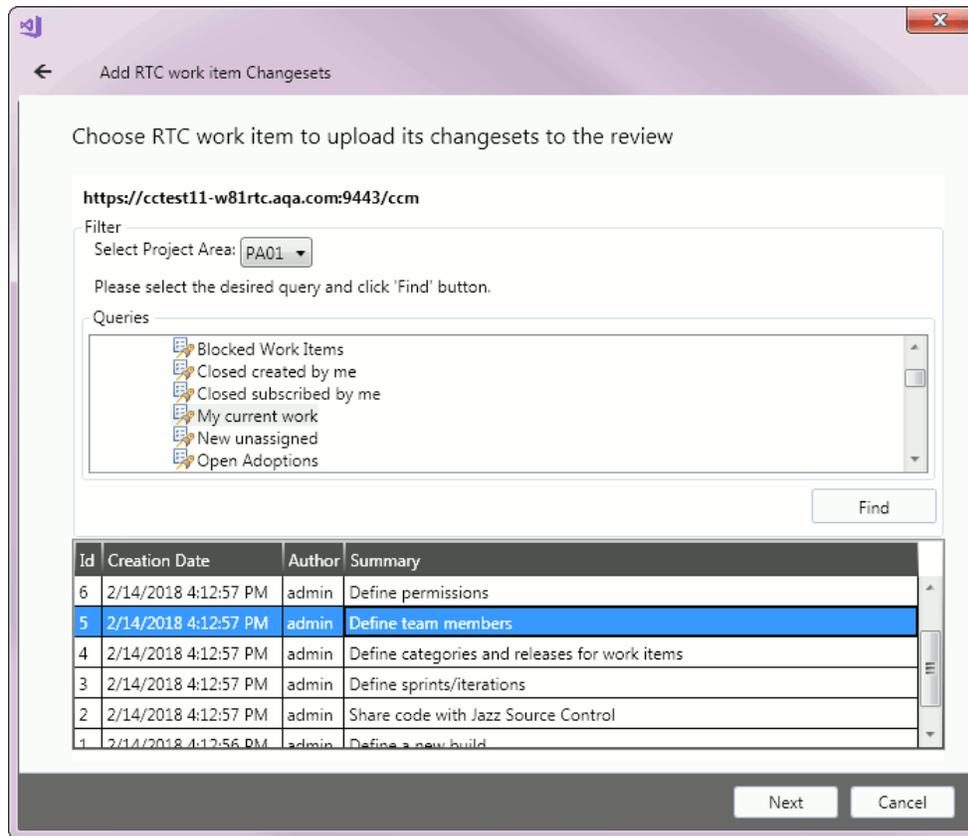
Creating Reviews From Visual Studio Manually

You need to [configure Collaborator's Visual Studio Extension](#)^[507] and select your RTC configuration as the default SCM configuration. After that you can call the extension's Add to Review Wizard and create reviews based on RTC changesets and work items.

- To create reviews for a specific RTC changesets: Select "Add RTC changesets", choose the desired workspace and component, click **Find** and then select the desired changesets.



- To create reviews for changesets linked to a specific RTC work item: Select "Add RTC work item changesets", choose the project area and perform one of the listed queries, click **Find** and then select the desired work item.



Requirements: to use this feature, you need to --

- [Configure](#) ^[627] Collaborator server and client.
- [Install](#) ^[632] and [configure](#) ^[635] the Collaborator plug-in for Rational Team Concert.
- [Install](#) ^[506] and [configure](#) ^[507] the Collaborator Visual Studio Extension.

Creating Reviews From Command-Line Client Manually

Commands recommended for Rational Team Concert

`ccollab addchangelist` - Attaches an atomic changelist to a review

Configuration

The Command-Line Client may need some configuration. Try [testing your configuration](#) ^[446] to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your Rational Team Concert configuration or you want to override the detected settings, you can manually specify Rational Team Concert settings using [global options](#) ^[458].

To manually configure the Command-Line Client to use Rational Team Concert, execute the following command:

```
ccollab set scm [456] rtc
```

Rational Team Concert-specific Options

In order to use Rational Team Concert integration from command-line client, you need to configure both Collaborator server and clients and RTC server. See [configuration instructions](#) ^[627].

Option	Description
<code>--rtc-repository-uri <value></code>	The URI of the repository to work with.
<code>--rtc-username <value></code>	The user name to use for the chosen RTC repository.
<code>--rtc-password <value></code>	The password of the user.

Requirements: to use this feature, you need to --

- [Configure](#) ^[627] Collaborator server and client.
- [Install](#) ^[632] and [configure](#) ^[635] the Collaborator plug-in for Rational Team Concert.

Synchronizing the Approvals and Participants Lists

For reviews that were created automatically on the work item's state change, Collaborator synchronizes the contents of the work item's Approvals list and the review's Participant list:

- When you append a Reviewer entry (user) to the Approvals list, Collaborator includes the same user into the Participants list of the review as a *Reviewer*. This also works in the opposite way: if you add users to participants, they are also added to approvers.
- Synchronization also works for deletion: if you remove a user from participants in Collaborator, the plug-in will remove that user from the Approvals list of your work item. Note, however, that the opposite deletion operation is not available at the moment, that is, if you delete a user from the Approvals list of a work item, Collaborator will not remove that user from the Participants list.

Notes:

- In order for this feature to work, the user must have the same name in Collaborator and in Rational Team Concert.
- When tracking changes made to the Approvals list, Collaborator tracks the addition of Reviewer entries only. If you add an entry of the Approver type, the review's Participants list will not be updated.
- Collaborator updates the Approvals list after the review left the Planning phase and moved to the Annotating phase. Any participant that was added during the Planning phase will also be included into the work item once you move the review to the Annotating phase.
- Collaborator synchronizes only those users, whose role allows them to finish the review. Participants that do not need to finish the review (for example, Observers) are not added to the work item's Approvals list. Similarly, if you remove such a user from the Participants list, they will not be deleted from the Approvals list. If you assign a participant a role that does not allow them to finish review (for example, change the role from *Reviewer* to *Observer*), Collaborator will delete this participant from the Approvals list.
- Once again, synchronization works for those reviews that were created automatically. It does not work for the reviews that were created through the "Add To Review" menu command.

If you do not want automatic updates of the user list, disable the *Add reviewers* and *Remove reviewers* settings of the Collaborator server. See [Configuring Collaborator Server](#).

Requirements: to use this feature, you need to --

- [Configure](#) the Collaborator server.
- [Install](#) and [configure](#) the Collaborator plug-in for Rational Team Concert.
- [Set up](#) follow-up actions in Rational Team Concert.

Updating Approver State

If a review was created automatically on the work item's state change, Collaborator tracks the changes made to the review phase. If a user completes the review, or cancels or rejects it, Collaborator updates the State attribute of that user in the Approvals list.

- If a user completed the review, the state is changed to **Approved**.
- If a user cancels or rejects the review, the state is changed to **Rejected**.

Requirements: to use this feature, you need to --

- [Configure](#) the Collaborator server.
- [Install](#) and [configure](#) the Collaborator plug-in for Rational Team Concert.
- [Set up](#) follow-up actions in Rational Team Concert.

Demonstration

Watch the following video to see Collaborator's integration with Rational Team Concert:

<https://support.smartbear.com/screencasts/collaborator/rational-team-concert-demo/>

Troubleshooting

See [Troubleshooting](#) ^[642].

6.6.3 Configuring Servers, Clients and Plug-Ins

Topics of this section describes how to configure the Collaborator server, client and plug-ins to use the Rational Team Concert integration features.

In This Section

[Configuring Collaborator Server and Clients](#) ^[627]

[Installing Collaborator Plug-In for Eclipse](#) ^[631]

[Installing Collaborator Plug-In for Rational Team Concert Server](#) ^[632]

[Configuring the Collaborator Plug-In on the Rational Team Concert Server](#) ^[635]

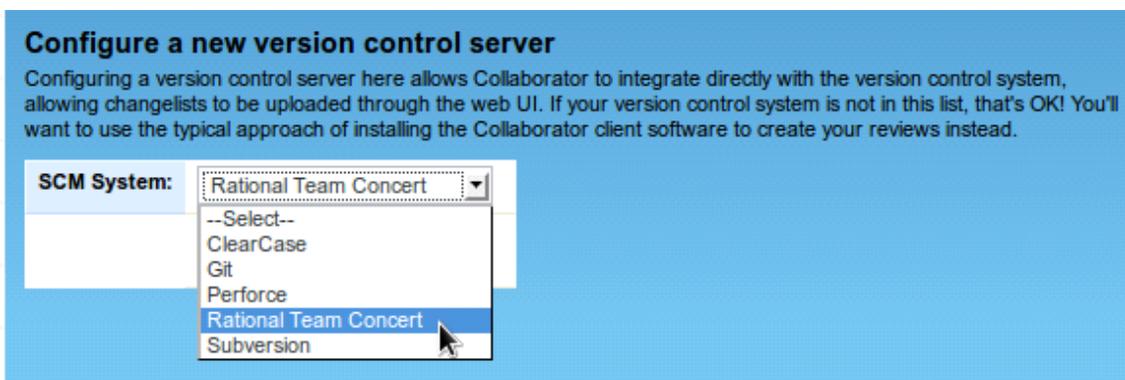
[Setting Up and Configuring Follow-Up Actions](#) ^[637]

6.6.3.1 Configuring Collaborator Server and Clients

To use Collaborator with Rational Team Concert, you need to configure your Collaborator server and its clients. Follow these steps:

1. Install RTC service to your Collaborator server. This service is installed by default during Collaborator server installation. If have disabled this service earlier, launch [server installer](#) ^[68] in update mode and enable the ["Install RTC service" advanced option](#) ^[75] during installation.

2. Download the "Rational Team Concert Plain Java Client" libraries that match your Rational Team Concert version to your Collaborator server computer from the <https://jazz.net/downloads/rational-team-concert/> web site.
3. Extract the files from the downloaded .zip to some temporary directory.
4. Delete the following .jar files from the temporary folder. This will prevent conflicts with libraries that the Collaborator server already uses.
The .jar file names may include version numbers. Delete the files that matches the names below, regardless of the version number in their name:
 - commons-io
 - org.apache.commons.codec
 - javax.servlet
5. Stop the Collaborator server.
6. Copy the extracted .jar files from the temporary directory to **<Your_Collaborator_Server_Dir>/tomcat/shared_lib**. Create the shared_lib folder if it does not exist.
7. If you plan to use RTC integration from Command-Line Client or from Visual Studio Extension, then delete one more file from the temporary directory with the extracted .jar files.
You need to delete the `org.apache.log4j` file (regardless of the version number in its name) and copy the remaining .jar files to **<Your_Collaborator_Client_Dir>/lib**.
8. Start the Collaborator server.
9. Open the Collaborator Web Client. Select **Admin** from the main menu. This will open the Administration settings page.
10. Choose **Version Control** from the menu on the left. Scroll the page down to the **Configure a new version control server** section (it is at the end of the page).
11. Create a new configuration for Rational Team Concert:
 - Select **Rational Team Concert** from the **SCM System** drop-down list and click **Create**:



- Specify the new configuration's settings:

Title	The configuration name. It identifies the configuration in Collaborator.
Server URI	The address of your Rational Team Concert server. Typically, this is a Public URI of the server. If the Public URI is inaccessible to you for some reason, you can specify the server's IP address.
Admin user name, and	The user account and password that Collaborator will use to connect to the Rational Team Concert server.
Admin password	Note: This account must have administrator permissions in Rational Team Concert.
Add reviewers	Specifies whether Collaborator will track addition of new entries (users) to a work item's Approvals list and adds the appropriate users to a review's Participants list. See How Integration Features Work ^[618] .
Remove reviewers	Specifies whether Collaborator will track deletion of entries (users) in the Participants list and update the work item's Approvals list accordingly. See How Integration Features Work ^[618] .
Update assignments	Specifies whether Collaborator updates the State attribute of a user in a work item's Approvals list when that user completes, cancels or rejects the review. See How Integration Features Work ^[618] .

- Click **Save** after you specified the settings.
- Click **Test Connection** to verify that the connection between Collaborator server and your Rational Team Concert server is established successfully and is trusted. For example, you might need to generate and/or accept trust certificates and so forth.
- The Client Configuration Mapping section defines correspondence between files uploaded by the various Collaborator clients and this server-side Rational Team Concert configuration.
Specify Java-style regular expressions to map changelists uploaded from our client tools to this Rational Team Concert server:

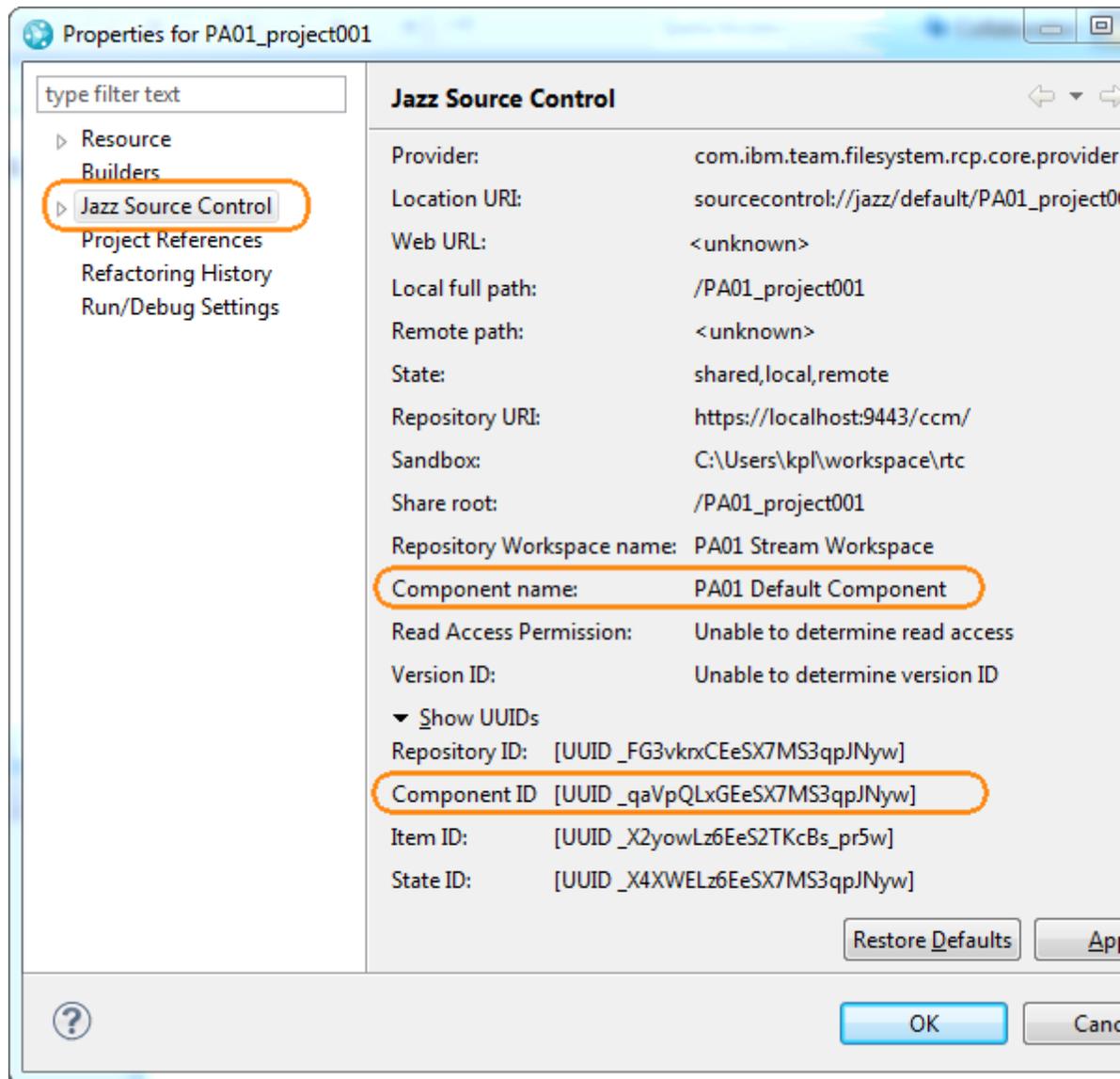
Team repository

The URL of your Team Concert repository.

Component and Component UUID

Parameters of your Team Concert project. To view them:

- In Eclipse, in **Project Explorer**, right-click the project and select **Properties** from the context menu.
- In the subsequent Properties dialog, select **Jazz Source Control** from the tree on the left. Find the p values on the right:



- Press **Save** to apply mapping configuration and enable server-side integration with this Rational Team Concert repository.

Other Configuration Actions

In addition to configuring the Collaborator server, you also need to install and configure special plug-ins for Rational Team Concert. For complete information on this, see topics of the [Configuring Servers and Plug-Ins](#) section.

6.6.3.2 Installing Collaborator Plug-In for Eclipse

To [create Collaborator reviews manually](#) from the Eclipse IDE, you need to install and configure the Collaborator plug-in for Eclipse. This topic provides detailed information on this.

Note: The Collaborator plug-in for Eclipse extends the functionality of Rational Team Concert plug-ins for Eclipse. If these Team Concert plug-ins are not installed, the Collaborator plug-in for Eclipse will not work.

To install and configure the Collaborator plug-in for Eclipse:

1. Download the [Collaborator Eclipse Plug-In](#) that matches Java version required by your Eclipse IDE:

Eclipse 4.7 (Oxygen)	Java 8 or newer
Eclipse 4.6 (Neon)	Java 8
Eclipse 4.5 (Mars)	Java 7
Eclipse 4.4 (Luna)	Java 7
Eclipse 4.3 (Kepler)	Java 6 (need to switch it to use Java 7 as described below)

Note: For more information about different versions, see [Version Compatibility Table in Overview](#).

2. Follow the Eclipse plug-in's [Install & Update instructions](#) to setup and configure the Eclipse plug-in.
3. If your version of Eclipse uses Java 6 or 5 (Eclipse 4.3 Kepler and earlier), then it is necessary to change the eclipse.ini file to use Java 7. Details about this change can be found at the following site:

http://wiki.eclipse.org/FAQ_How_do_I_run_Eclipse%3F

Here is an example of the change:

```
-vm C:\Program Files\Java\jdk1.7\jre\bin\javaw.exe
```

Other Configuration Actions

If you are going to create reviews manually, then all you need is to install and configure the Collaborator plug-in for Eclipse. To use other [integration features](#)^[616], you need to install configure the Collaborator server and install and configure special plug-ins for Rational Team Concert. For complete information on this, see topics of the [Configuring Servers and Plug-Ins](#)^[627] section.

6.6.3.3 Installing Collaborator Plug-In for Rational Team Concert Server

This topic explains how to install the Collaborator plug-in for Rational Team Concert.

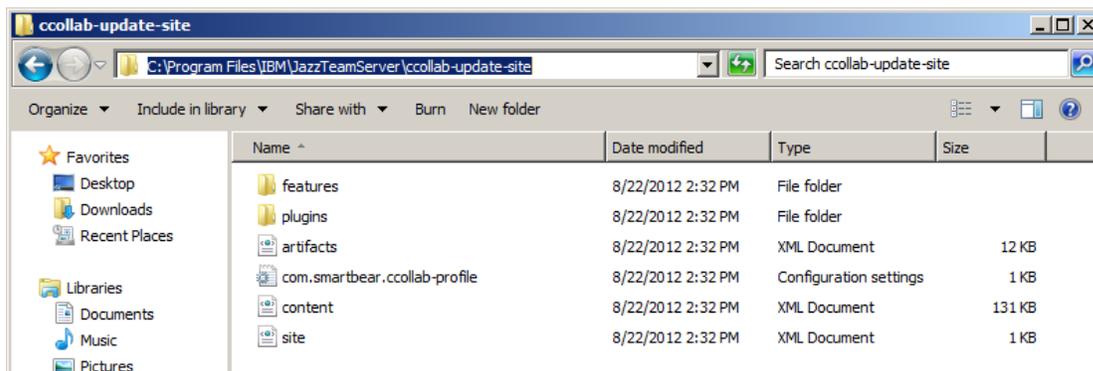
Important: Since version 8.5 Collaborator requires Java 7. Rational Team Concert 6.0.1 and later also require Java 7. Whereas, Rational Team Concert 4.x - 6.0 (prior to 6.0.1) require Java 6, and RTC 2.x - 3.x require Java 5. Therefore to integrate Collaborator and Rational Team Concert you will need to install a specific version of Rational Team Concert Plug-In. To integrate with Rational Team Concert 2.x - 3.x you also need to downgrade your Collaborator (both Server and Client components) to CodeCollaborator/PeerReview Complete version 6.5.x (as only these versions supported Java 5).

1. Download the update site .zip package with the plug-in from our web site:

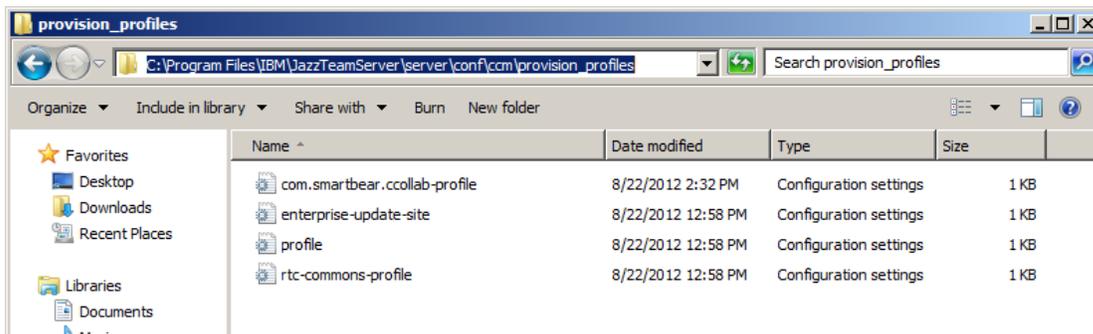
- For Rational Team Concert Server version 6.0.1 and higher download the [java_7 version of Collaborator Eclipse Plug-In](#).
- For Rational Team Concert Server versions 4.x - 6.0 (prior to 6.0.1) download [Rational Team Concert Plug-In version 8.4.8406.001](#).

Note: For more information about different versions, see [Version Compatibility Table in Overview](#)^[616]

2. Extract files from the downloaded .zip archive to the <\$JAZZ_ROOT>/ccollab-update-site folder on the Rational Team Concert server computer. For example, the folder name can be like C:\Program Files\IBM\JazzTeamServer\ccollab-update-site.



3. Copy the *com.smartbear.ccollab-profile.ini* file from this folder to the `<$JAZZ_ROOT>\server\conf\ccm\provision_profiles` folder.



4. Now you need to reset your Jazz Team Server:

- Open the following web page in your web browser:

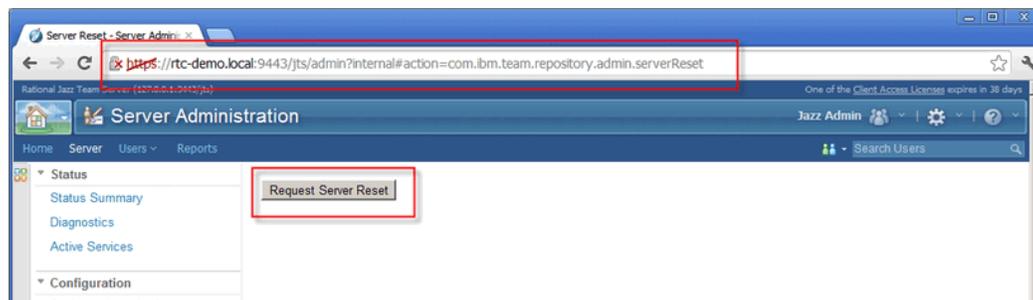
If you use Rational Team Concert 4-6:

[https://\\$Your_Jazz_server/jts/admin?internal#action=com.ibm.team.repository.admin.serverReset](https://$Your_Jazz_server/jts/admin?internal#action=com.ibm.team.repository.admin.serverReset)

If you use Rational Team Concert 3 or earlier:

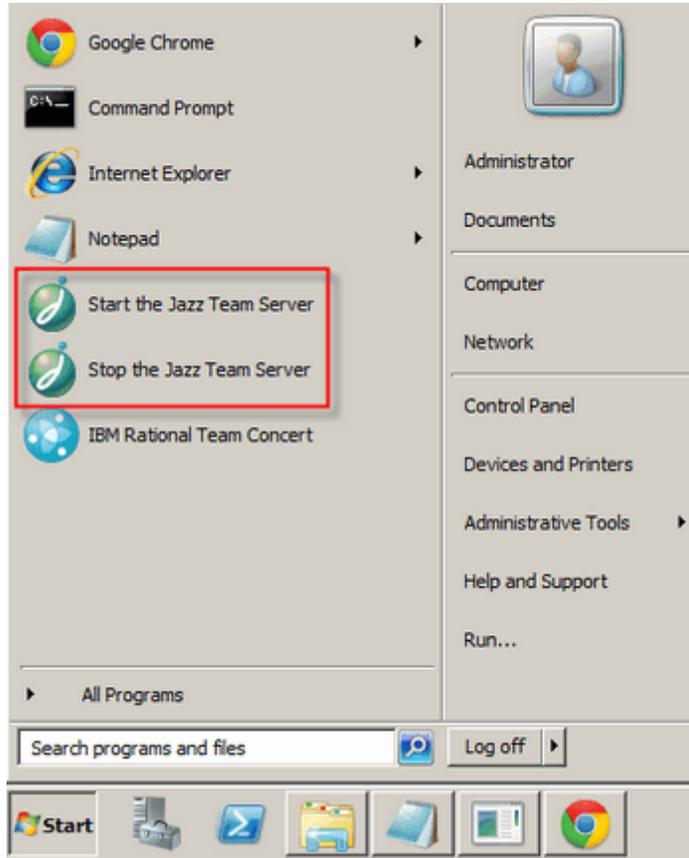
[https://\\$Your_Jazz_server/jazz/admin?internal=true](https://$Your_Jazz_server/jazz/admin?internal=true)

- On the page, click **Request Server Reset**. This will command Rational Team Concert to load the Collaborator plug-in next time the Rational Team Concert service restarts.



5. Restart the Jazz Server. To do this:

- Select **Stop the Jazz Team Server** from Windows' Program Files menu, or run the *shutdown.bat* file in the Jazz Install directory.
- Run the server by selecting **Start the Jazz Team Server** from the Program Files menu:

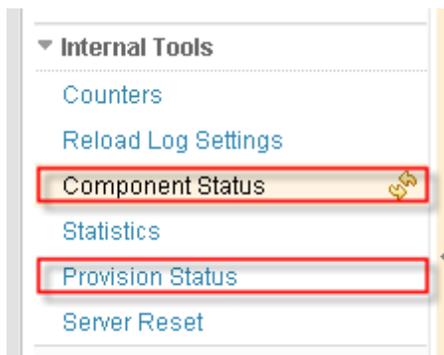


6. Check whether the plug-in is loaded:

- Open the Component Status page:

[https://\\$Your_Jazz_server/ccm/admin?internal=true#action=com.ibm.team.repository.admin.componentStatus](https://$Your_Jazz_server/ccm/admin?internal=true#action=com.ibm.team.repository.admin.componentStatus)

- Click the refresh icon next to the **Component Status** item in the left-side menu to update the page after it loads.
- Check that the *com.smartbear.collaborator.rtc.process.ICollaboratorService* service is active.
- Now click Provision Status in the menu menu entry:



- Search for *smartbear* on the page and make sure that the plug-in has been installed and initialized.

Provision Status page: Checking whether the plug-in is installed

```
CRJAZ0300I This feature is being installed: "com.smartbear.collaborator.rtc.
process.feature_ NN.N.NNNNN.NNN" .
CRJAZ0299I Installing bundle from the URL "file:/<JAZZ_ROOT>/server/conf/../../
ccollab-update-site/plugins/com.smartbear.collaborator_ NN.N.NNNNN.NNN.jar".
CRJAZ0299I Installing bundle from the URL "file:/<JAZZ_ROOT>/server/conf/../../
ccollab-update-site/plugins/com.smartbear.collaborator.rtc.common_ NN.N.NNNNN.
NNN.jar" .
CRJAZ0299I Installing bundle from the URL "file:/<JAZZ_ROOT>/server/conf/../../
ccollab-update-site/plugins/com.smartbear.collaborator.rtc.process_ NN.N.NNNNN.
NNN.jar" .
CRJAZ0299I Installing bundle from the URL "file:/<JAZZ_ROOT>/server/conf/../../
ccollab-update-site/plugins/com.smartbear.collaborator.rtc.component_ NN.N.
NNNNN.NNN.jar" .
```

where *NN.N.NNNNN.NNN* stands for the version number of Collaborator plug-in.

Provision Status page: Checking whether the plug-in is started

```
CRJAZ0307I Starting the bundle "com.smartbear.collaborator_ NN.N.NNNNN.NNN" .
CRJAZ0307I Starting the bundle "com.smartbear.collaborator.rtc.common_ NN.N.
NNNNN.NNN" .
CRJAZ0307I Starting the bundle "com.smartbear.collaborator.rtc.process_ NN.N.
NNNNN.NNN" .
CRJAZ0307I Starting the bundle "com.smartbear.collaborator.rtc.component_ NN.N.
NNNNN.NNN" .
```

where *NN.N.NNNNN.NNN* stands for the version number of Collaborator plug-in.

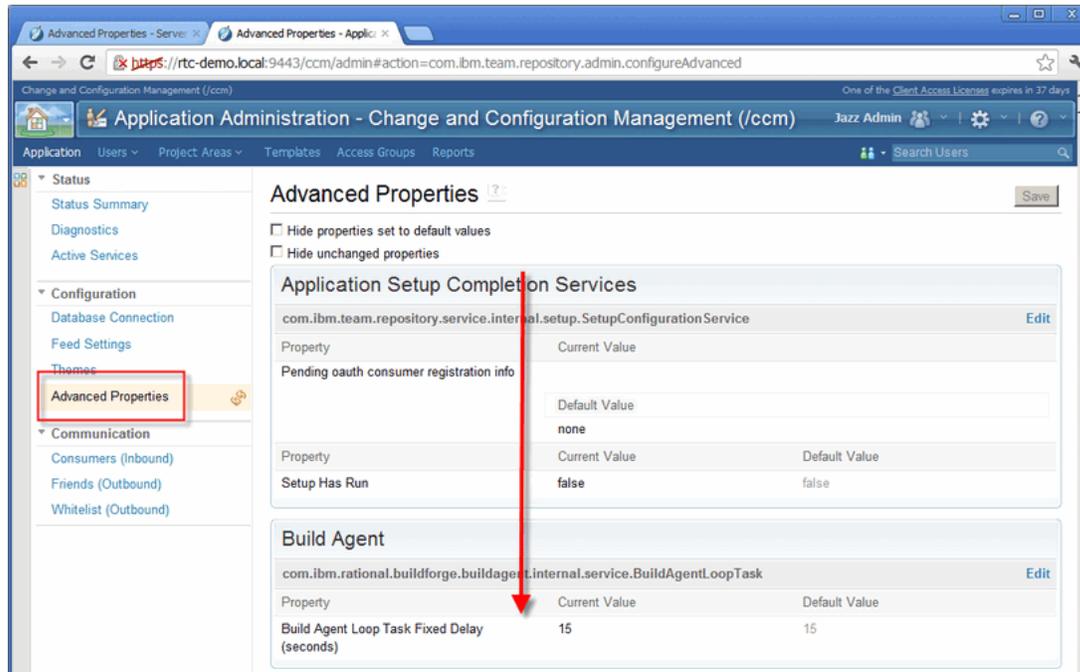
Other Configuration Actions

After you installed the plug-in, you need to configure it. See [Configuring the Collaborator Plug-In for Rational Team Concert](#)^[635].

6.6.3.4 Configuring Collaborator Plug-In for Rational Team Concert Server

After installing the Collaborator plug-in for Rational Team Concert, you need to configure it. Follow these steps:

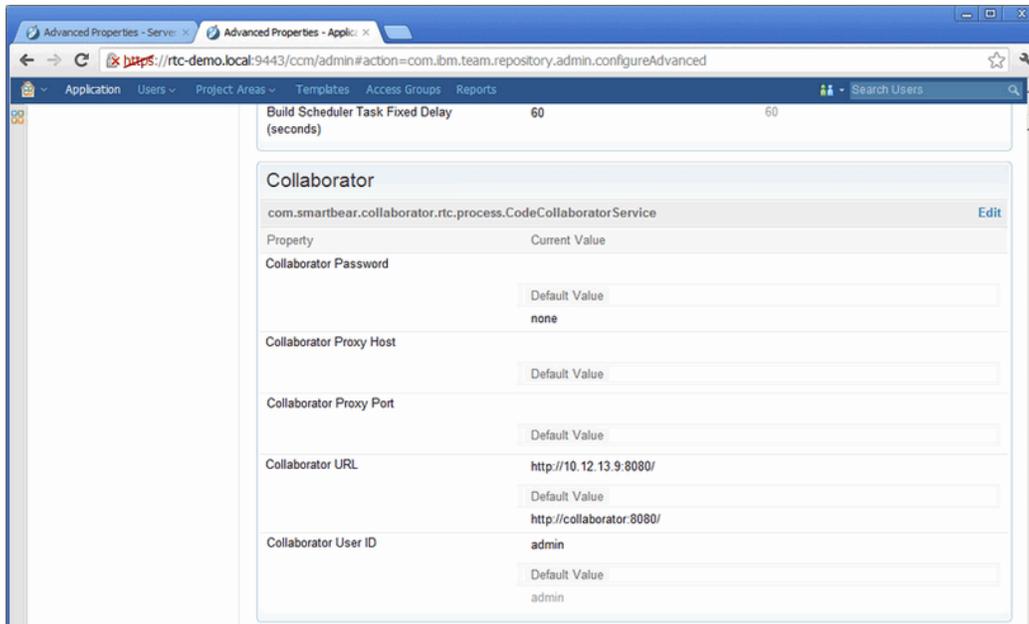
1. Login to the Change and Configuration Manager at [https://\\$Your_Jazz_server/ccm/admin](https://$Your_Jazz_server/ccm/admin), for example, <https://rtc-demo.local:9443/ccm/admin>.
2. Select **Advanced Properties** from the menu on the left and then scroll down to the Collaborator section:



3. Configure the settings and save them (see the image below). The settings have self-descriptive names, and hardly require explanation.

Two notes:

- The Collaborator User ID setting specifies the user account that sends notifications on file uploads. Uploads from RTC to Collaborator will appear to have been done by this user. Collaborator is unable to display the name of the RTC user that actually made the changes, this is a limitation of the RTC/ Collaborator integration. This account should have *administrator permissions* in Collaborator.
- Specify host and port if you connect to Collaborator via proxy.



Other Configuration Actions

After configuring the plug-in, you can proceed with [setting up the follow-up actions](#)⁶³⁷ in Rational Team Concert.

6.6.3.5 Setting and Configuring Follow-Up Actions

After you [installed](#)⁶³² the Collaborator plug-in for Rational Team Concert, you need to configure follow-up actions in Team Concert.

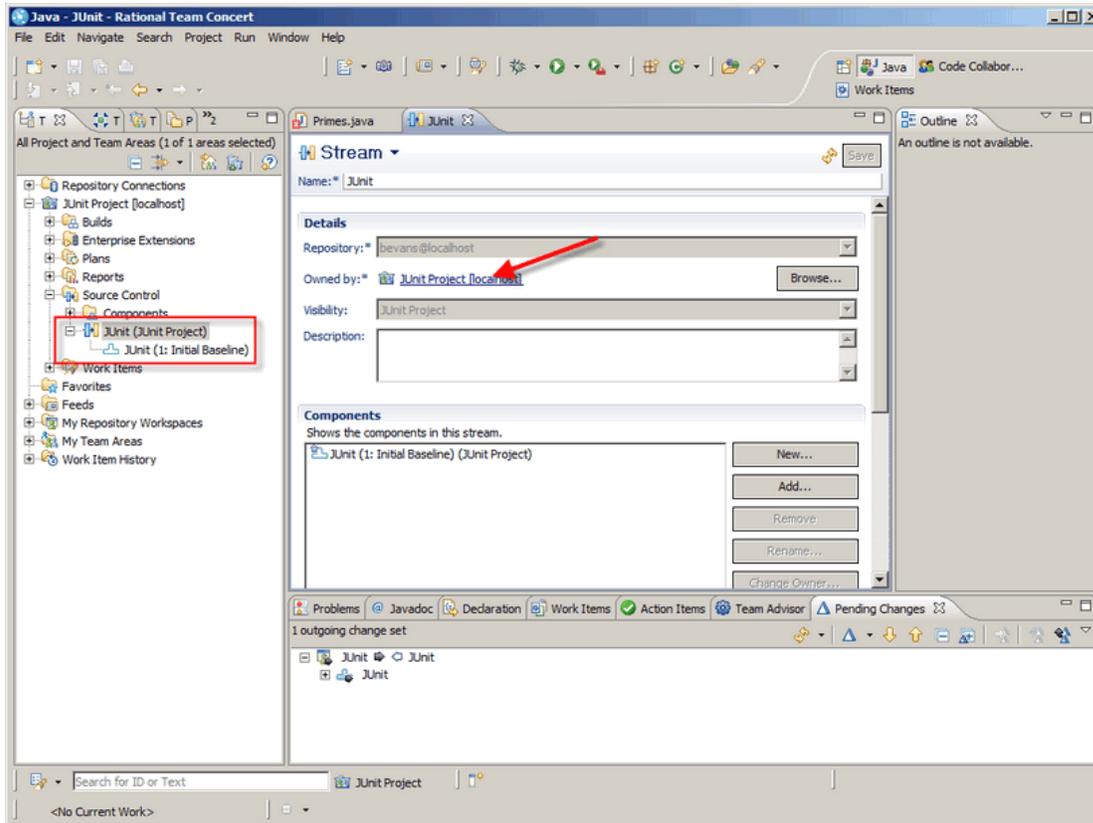
[Configuring Follow-Up Actions](#)⁶³⁷

[Action Parameters](#)⁶³⁹

- [Update Reviews for Each Linked Work Item](#)⁶³⁹
- [Upload Changes From Work Item](#)⁶⁴⁰

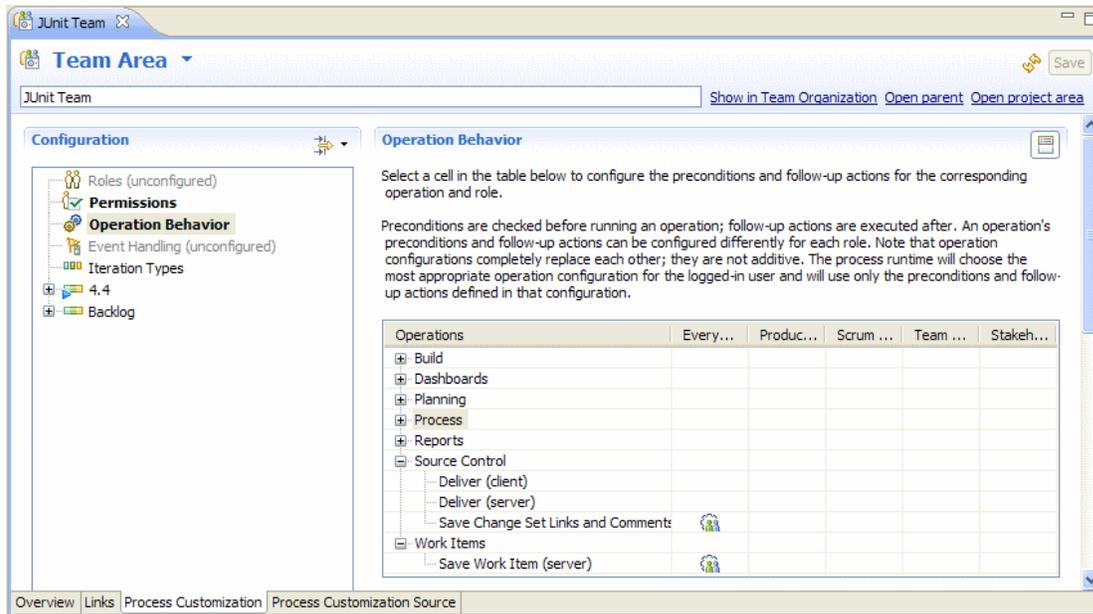
Creating Follow-Up Actions

1. In the Rational Team Concert Client, open your project by clicking its name in the **Stream** section:



This will open the Team Area view.

2. In the Team Area view, select **Operation Behavior** from the tree on the left and then go to **Source Control | Save Change Set Links and Comments** on the right and add a follow-up action **Update reviews for each linked work item** to it.
3. Select **Operation Behavior** from the tree on the left, then choose **Work Items | Save Work Item (server)** on the right, and add the follow-up **Upload changes from work item** to it:



Action Parameters

Update Reviews for Each Linked Work Item

This follow-up action creates a review associated to a work item when a new changeset is added to that work item.

The changeset must be new. If you add changes to some existing changeset associated with the work item, the review is not automatically updated. In this case, you need to change the work item's state and save the changes. If you have another follow-up action configured (see below) this will update the review.

The action's settings are stored in an XML file. You can change the action settings, and they will override the [plug-in's settings](#)⁶³⁵. To do this, simply edit the XML file of the action. Below is a sample XML snippet with action settings:

```
<followup-action description="Collaborator - Update Reviews for each
linked Work Item" id="com.smartbear.collaborator.rtc.process.
ChangeSetModified" name="Collaborator - Update Reviews for each
linked Work Item">
  <CollaboratorURL value="http://localhost:8080"/>
  <CollaboratorProxyHost value="proxyhost"/>
  <CollaboratorProxyPort value="22"/>
  <CollaboratorUserID value="admin"/>
  <CollaboratorUserPassword value="123"/>
</followup-action>
```

```
<retries value="1"/>
<retryDelayMs value="500"/>
</followup-action>
```

Here are some notes on the file contents:

- All child elements of the followup-action element are optional. If you do not specify some values, they are taken from the global plug-in settings.
- The `CollaboratorProxyPort` and `CollaboratorProxyPort` can have empty values to override the global plug-in settings.
- If you need to specify the user that will work for multiple Collaborator servers, create a user with the same name and password on all the needed Collaborator servers and then specify this user name and password in the global plug-in settings.
- The password is stored as plain text on the XML configuration.
- The action requests some information from the Team Concert repository. This information may be unavailable at the moment the action runs, so the action may need to wait for an answer.

To prevent possible issues due to these delays, use the `retries` and `retryDelayMs` values. The `retries` value specifies the number of times the follow-up action repeats its requests, and the `retryDelayMs` value indicates the number of milliseconds the action will wait for a response. Both settings accept only positive integer numbers as their values.

Since the delay can depend on the Rational Team Concert server settings, there are no pre-defined value that will work on every server configuration. You can start using small numbers for the values (like 3 retries and 500 ms delay) and then increase or decrease these values until you find a configuration that works best for you.

Upload Changes From Work Item

The Collaborator plug-in uses this follow-up action to track the changes of a work item state.

The action's settings are stored in an XML file. You can change the action settings, and they will override the [plug-in's settings](#)^[636]. To do this, simply edit the XML file of the action. Below is a sample XML snippet with action settings:

```
<followup-action id="com.smartbear.collaborator.rtc.process.
UploadToCollab">
  <CollaboratorURL value="http://localhost:8080"/>
  <CollaboratorProxyHost value="proxyhost"/>
  <CollaboratorProxyPort value="22"/>
  <CollaboratorUserID value="admin"/>
  <CollaboratorUserPassword value="123"/>
  <type value="Defect"/>
  <type value="Enhancement"/>
```

```

<type value="Task"/>
<StateChangedTo value="New"/>
<OnStatus type="Story" state="Implemented"/>
<updateReviewers value="false"/>
<newReviewOnCancel value="false"/>
</followup-action>

```

Here are some notes on the file contents:

- All the elements are optional.
- The settings `CollaboratorURL`, `CollaboratorProxyHost`, `CollaboratorProxyPort`, `CollaboratorUserID`, and `CollaboratorUserPassword` override the [plug-in settings' values](#)^[635].
- There are several elements that define the scope of work items, for which Collaborator will create reviews automatically:
 - `type` specifies the work item types for that Collaborator will create reviews. You can specify multiple `type` elements in the settings. You specify a type by its display name, not by its id. This name is case-sensitive.
 - `StateChangedTo` specifies the work item states that Collaborator will trace (Collaborator will create a review for a work item when this work item is switched to the specified state). You can use multiple `StateChangedTo` elements in the settings.
 - `OnStatus` combines functionality of both `type` and `StateChangedTo`. It specifies a couple of values (type and state) in one setting. These values can be types and states specified by the `type` and `StateChangeTo` elements, or any other types and states. That is, `OnStatus` elements is just one more way to define the conditions that trigger review creation. There can be multiple `OnStatus` elements in the settings.
- The Collaborator plug-in can trace changes in the Approvals list of a work item. When you add an entry of the Reviewer type to this list, the plug-in sends a command to the Collaborator server to update the Participants list of the review associated with that work item. See [How Integration Features Work](#)^[618].

The `updateReviewers` setting lets you enable or disable this functionality. If the value is `true` or not specified, the Collaborator will update the Participants list of a review. To disable this functionality, set the value to `false`.

- The `newReviewOnCancel` option specifies whether the follow-up action will create a new review for a work item, if its previous review was canceled or rejected. At that, all the changes from the work item changesets will be added to the new review. After the new review is created, the action replaces a link to the previous review with a new review link. The work item will have only one link to a review.

Other Configuration Actions

In addition to configuring the Collaborator plug-in for Rational Team Concert and follow-up actions, you also need to configure the Collaborator server. For detailed information on this, see topics of the [Configuring Servers and Plug-Ins](#)^[627] section.

6.6.4 Troubleshooting

This topic lists typical issues for the Collaborator integration with Team Concert and possible solutions for them.

[General Notes](#)^[642]

[Issues](#)^[642]

[Synchronizing the Review Participants List](#)^[642]

[Automatic Review Creation and File Uploading](#)^[643]

[Manual Review Creation](#)^[644]

[Getting Client and Server Logs](#)^[644]

General Notes

In order for Collaborator and Rational Team Concert to integrate successfully, you need to configure the Rational Team Concert and Collaborator servers, as well as install and configure special plugins. If some feature is not working, then most likely some setting is invalid. Check the settings according to the information in the [Configuring Servers and Plug-Ins](#)^[627] section.

Issues

Synchronizing the Review Participants List

For reviews that were created automatically, Collaborator synchronizes the work item's Approvals and the review's Participants lists (see [How Integration Features Work](#)^[625]). If the synchronization does not work, check the following:

- Look at the review phase. Collaborator does not synchronizes the lists if the review is in the Planning phase.
- The review must be created automatically. Synchronization does not work for the reviews that were created with the "Add to Review" command.
- Check if the user has the same names in Collaborator and Team Concert. Users with different names are not synchronized.

- Make sure the *Add reviewers* and *Remove reviewers* settings of the Collaborator server are enabled. See [Configuring Collaborator Server](#).
- Check the connection between Collaborator and Team Concert. To do this, log in to Collaborator as administrator, go to **Admin > Version Control**, find your Rational Team Concert configuration there and click **Test Connection**.
- Check the user's roles in Collaborator and Team Concert.
In Collaborator, the user should have a role that allows the user to finish reviews. By default, this is the *Reviewer* role, *Observers* are ignored.
In Team Concert's, the user be added to the *Approvals* list as a *Reviewer*. *Approvers* are ignored.
- Check the **Client Configuration Mapping** settings of Collaborator and make sure the configuration matches the desired Team Concert server. See [Configuring Collaborator Server](#).

Automatic Review Creation and File Uploading

If Collaborator does not create reviews automatically when a work item's state changes, or if the files failed to upload to the review, check the following:

- Check the user names in Collaborator and Team Concert. They should be the same. Otherwise, errors will occur.
- Check if the Collaborator plugin for the Rational Team Concert server is installed and enabled. To do this, request the Provision Status page from the Team Concert server (<https://<your-team-concert-server:port>/ccm/admin?internal=true#com.ibm.team.repository.admin.provisionStatus>) and search for *smartbear* on it. The page should say the Collaborator is installed and enabled. For information on installing and configuring the plugin, see [Installing Collaborator Plug-In for Team Concert](#) and [Configuring Collaborator Plug-in for Team Concert](#).
- Get the `ccm.log` file from the Team Concert server (see below). If the log says that follow-up actions of Collaborator cannot be found, set up and configure these actions. See [Setting and Configuring Follow-Up Actions](#).
- If Collaborator does not create reviews, or creates them for unexpected item states, check the follow-up actions' settings.
- Check the work item categories in Team Concert. For example, if you are trying to create a review for work item that belongs to a team area, make sure this item does not use the project configuration.

- Get the log file from the Team Concert Client (see below). If the log reports about issues with class versions, make sure you installed the appropriate version of Collaborator's Eclipse plugin. If you use Rational Team Concert 3, you need to use the plugin from previous version of Collaborator. See a note in [Installing Collaborator Plug-In for Rational Team Concert](#)⁶³².

Manual Review Creation

If you experience issues when creating reviews manually from the Team Concert client in Eclipse IDE, then most likely there are issues with the Collaborator's Eclipse plugin:

- Check the installation folder of your Team Concert client. If it is installed in the < *Program Files* > folder, this may cause problems for Eclipse. In this case, we recommend that your user account has administrator privileges and that you run the Client as administrator.
- Get the log file from the Team Concert Client (see below). If the log reports about issues with class versions, make sure you installed the appropriate version of Collaborator's Eclipse plugin. If you use Rational Team Concert 3, you need to use the plugin from previous version of Collaborator. See a note in [Installing Collaborator Plug-In for Rational Team Concert](#)⁶³².

Getting Client and Server Logs

When some functionality does not work, you need to examine the Team Concert logs to understand what went wrong.

To get the log of an Eclipse-based Team Concert client:

- In the Team Concert client, select **Help > About Rational Team Concert** from the main menu.
- In the subsequent About dialog box, click **Installation Details**.
- In the subsequent dialog, switch to the **Configuration** tab and click **View Error Log** there.

To get the server log of Team Concert:

- On the server computer, go to the <*Jazz Team Server*>/server/logs folder.
- View the `ccm.log` file.

If the Team Concert server is installed on WebSphere, the log file will be in the `logs` directory of the Application server where Team Concert is installed.

6.7 Mercurial Integration

This section describes Collaborator integration with Mercurial:

GUI Client

The GUI Client can upload arbitrary Mercurial diffs. The GUI Client can also upload local changes to files that are managed by Mercurial.

Command-Line Client

The Command-Line Client can upload arbitrary Mercurial diffs and uncommitted changes to files that are managed by Mercurial.

Supported Versions

Our integration uses your own installed Mercurial command line client executable to generate differences for review. We require hg v1.0 or later, as we use the -U flag to provide full context lines of differences so that the uploaded versions can contain the full file content of the previous and current file versions. The TortoiseHg client is not supported.

Because we use client applications already present on your computer, we support all protocols, authentications, proxies, and other client configuration options you are currently using.

Technical Details and Limitations

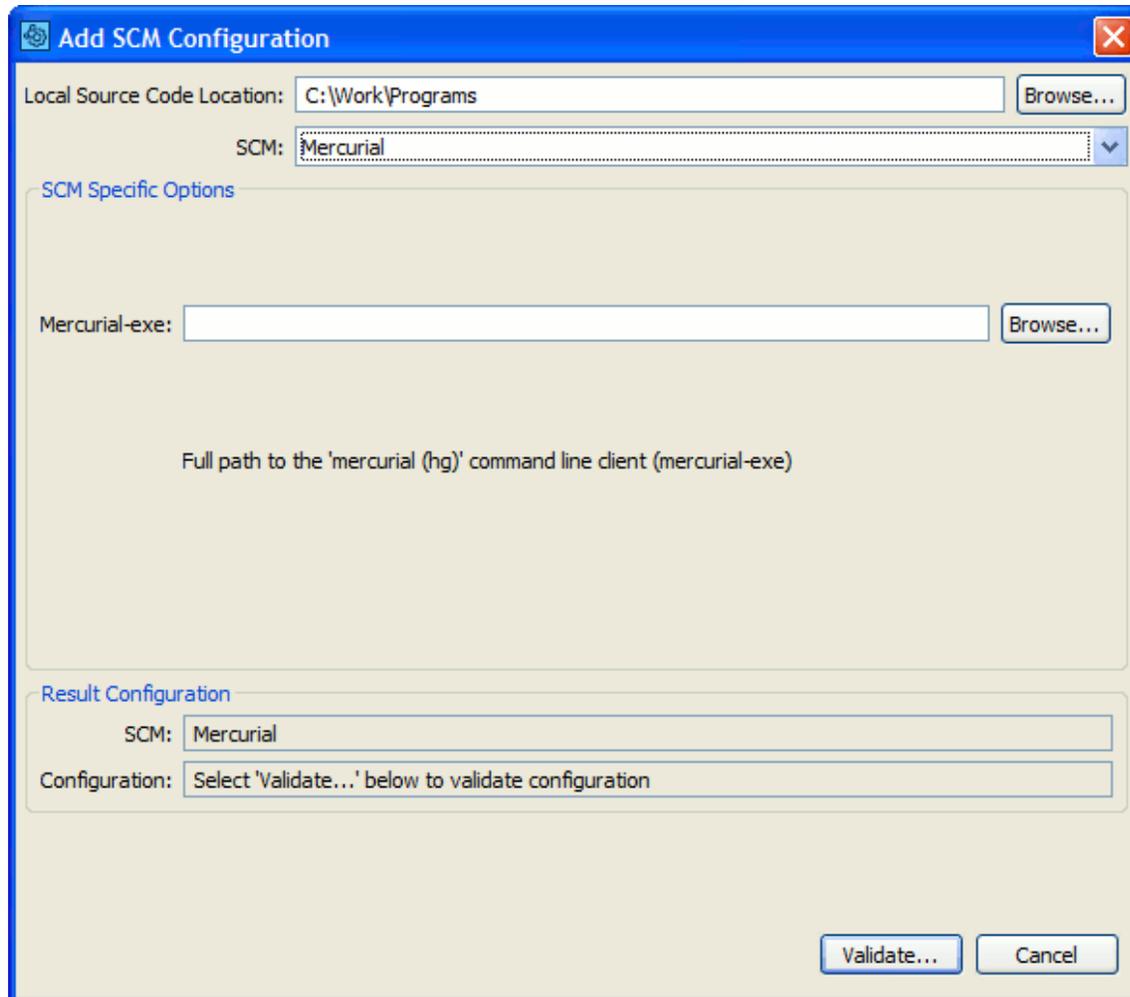
Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you add several diffs (non atomic changelists) to the same review.

6.7.1 GUI Client

Mercurial-specific Options

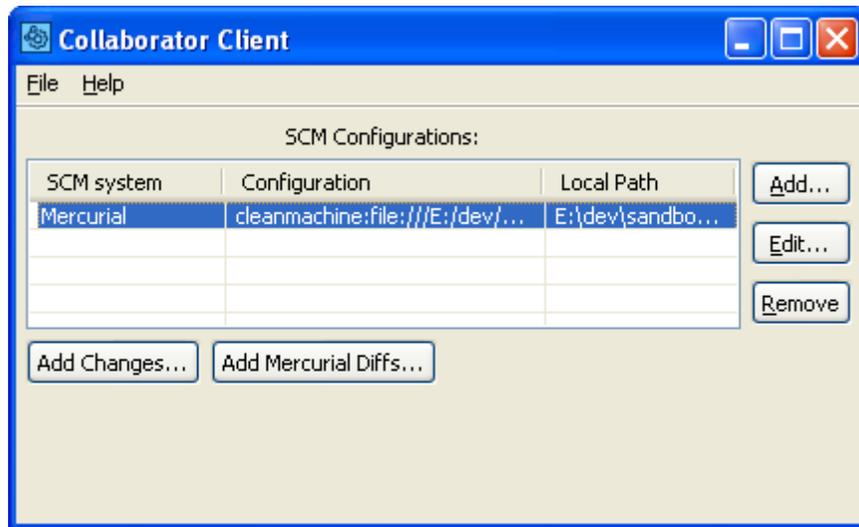
The [SCM Configuration dialog](#)^[437] has one Mercurial-specific option. The full path to the Mercurial command line executable on your local file system should be specified if it is not already on your system path.



Configure client to work with Mercurial

Uploading files to a Review

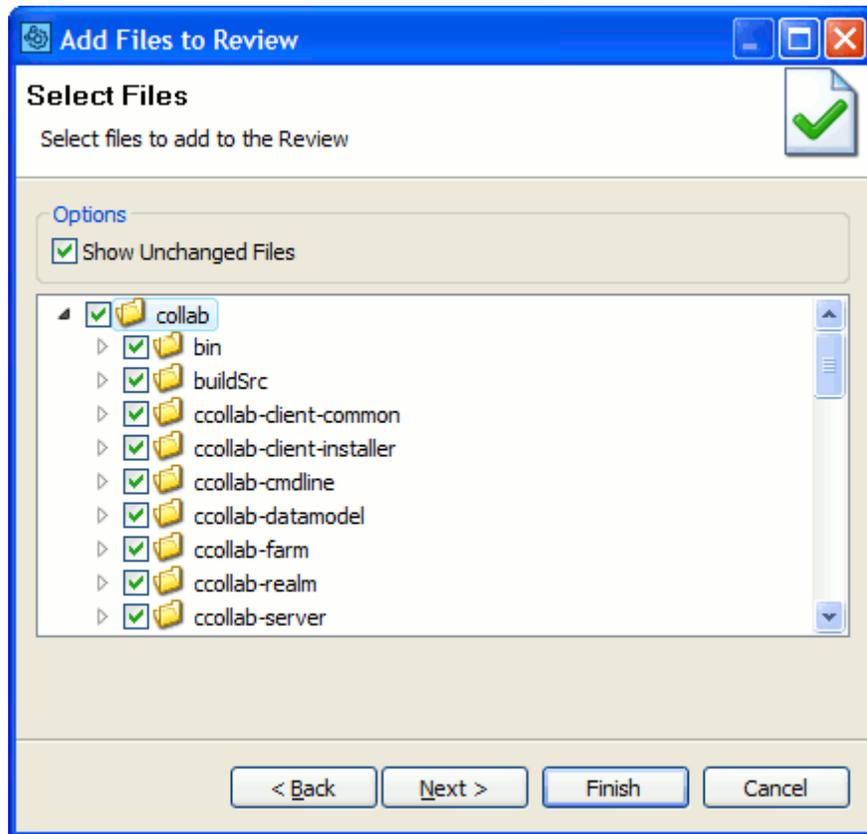
Selecting a Mercurial SCM Configuration in the GUI Client [main screen](#)^[438] causes *Add to Review buttons* to appear.



Uploading Mercurial files to a review

Add Changes

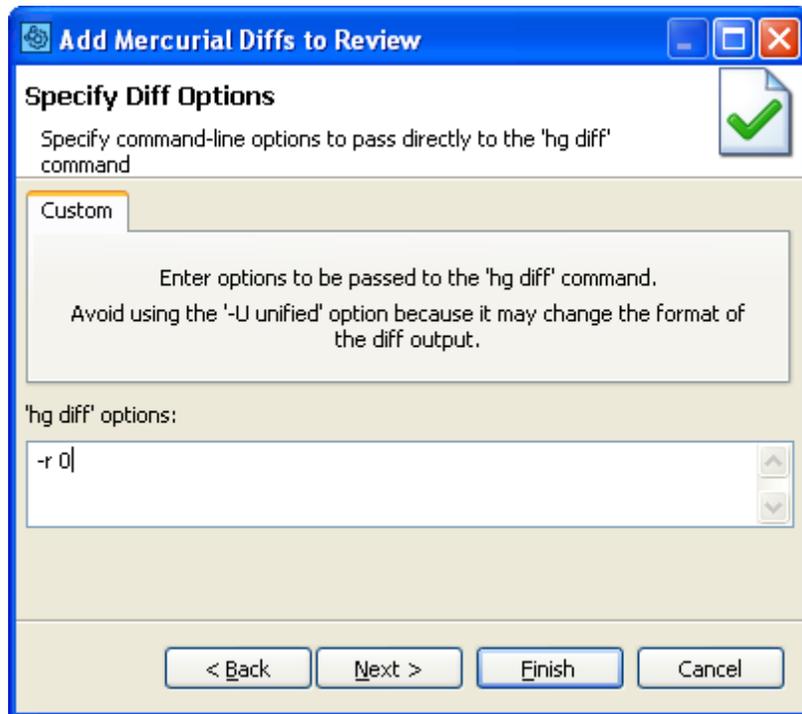
The Add Changes... button will be disabled if you have not specified a working copy in the Local Path field of the [SCM Configuration dialog](#)⁴³⁷. Selecting Add Changes... allows you to upload your local modifications. These are the modifications that would be committed if you typed 'hg commit' from a command line.



Add Changes

Add Mercurial Diffs

Press the *Add Mercurial Diffs...* button to upload arbitrary Mercurial diffs to the Collaborator Server for review. Note that if you did not specify a Local Source Code Location in the [SCM Configuration dialog](#)⁴³⁷, then you will need to provide absolute paths in your diff options.



Upload arbitrary Mercurial diffs

6.7.2 Command-Line Client

Commands recommended for Mercurial

`ccollab addchanges`^[650] - Attaches locally-modified files to a review

`ccollab addhgdiffs`^[651] - Uploads diffs generated by hg diff command

Configuration

In most cases, the Command-Line Client can automatically detect your Mercurial configuration. Try [testing your configuration](#)^[446] to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your Mercurial configuration or you want to override the detected settings, you can manually specify Mercurial settings using [global options](#)^[456].

To manually configure the Command-Line Client to use Mercurial, execute the following command:

```
ccollab set scm[456] mercurial
```

Mercurial-specific Options

Option	Description
<code>--mercurial-exe <value></code>	Full path to the 'mercurial (hg)' command line client

6.7.2.1 addchanges (for Mercurial)

Description

The `ccollab addchanges` command uploads locally modified files controlled by Mercurial to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchanges [--upload-comment <value>]
<review> <file-spec> [<file-spec> ...]
```

Command Options

Option	Required?	Description
<code>global-options</code>	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ^[455] .
<code>--upload-comment <value></code>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
<code><review></code>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<code><file-spec></code> <code>[<file-spec> ...]</code>	Yes	Files to be added and/or folders to scan for modified files. Separate multiple file and folder names with spaces. If a file or folder name contains spaces, enclose this name in quotes.

Option	Required?	Description
		<p><code>ccollab</code> scans folders recursively. The resulting list includes the name of modified files. "Modifications" include include edits, additions, deletions, branches, integrations, moves, copies, and so on.</p> <p>After the scan is complete, a file list is presented in a graphical editor so you can review the files to be uploaded and make correct the list, if needed.</p>

Examples:

To create a new review and add all changes in the current directory and below, plus the file `foo.txt`, you would use:

```
ccollab addchanges new . foo.txt
```

To upload modified files from the current working directory and all subdirectories to review 123:

```
ccollab addchanges 123 .
```

To upload file `foo.txt` and modified files from `c:\dev\project` into a brand new review:

```
ccollab addchanges new foo.txt c:\dev\project
```

6.7.2.2 addhgdiffs

Description

The `ccollab addhgdiffs` command uploads differences between arbitrary versions of files in Mercurial. The differences are generated using the native 'hg diff' command of Mercurial.

Command Line Syntax:

```
ccollab [global-options] addhgdiffs [--upload-comment <value>]
<review> [<user-diff-arg> [<user-diff-arg> ...]]
```

Command Options

Option	Required?	Description
<code>--upload-comment <value></code>	No	Comment used to upload files (defaults to command-line arguments)
<code><review></code>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<code><user-diff-arg> [<code><user-diff-arg> ...]</code></code>	No	Command-line arguments to pass directly to the diff command

Remarks:

Do not use diff arguments that affect the diff output such as '-U unified'. The Collaborator command-line client will automatically select an output format that ensures you will get all the data you need on the server.

Mercurial treats Microsoft Office documents (.DOC, .DOCX, .XLS, .XLSX) and PDF files as binary files. Thus, the native 'hg diff' command is not able to generate meaningful difference for these types of files. Because of this the `ccollab addhgdiffs` command is also unable to upload differences between Microsoft Office documents (.DOC, .DOCX, .XLS, .XLSX) and PDF files.

Examples:

To upload all changes between revisions 4 and 8:

```
ccollab addhgdiffs new -r 4 -r 8
```

To upload all changes in your local working directory:

```
ccollab addhgdiffs new .
```

6.8 Microsoft Team Foundation Server Integration

This section describes Collaborator integration with Team Foundation Server.

GUI Client^[655]

The GUI Client can upload [local changes to files](#)^[657] in a Team Foundation Server Workspace. The GUI Client can also upload the files in a [Shelveset](#)^[658] or [Changeset](#)^[659].

Command-Line Client^[662]

The Command-Line Client can upload [local changes to files](#)^[663] controlled by Team Foundation Server before they are checked in. The Command-Line Client can also upload the files in a [Shelveset](#)^[665] or [Changeset](#)^[665].

Supported Versions

Team Foundation Server versions 2010 through 2018 are supported by the [Command-Line Client](#)^[662] and the [GUI Client](#)^[655].

Our client integrations use Team Foundation Server SDK to communicate with Team Foundation Server. Because of this, we support all protocols, authentications, proxies, and other client configuration options that are supported by SDK.

Remarks

Additionally to version control integration with Team Foundation Server, you can enable integration with TFS work items. This will allow synchronizing reviews and work items addressed in that reviews, appending the issues to the review's Remote System Links section and retrieving the item's current status. See [Issue-Tracking Integrations: Overview](#)^[778] for more information.

The Team Foundation Server integration will not work with non-English installations of Visual Studio .NET. Regional settings for other locales are supported, but installing a non-English Visual Studio prevents correct parsing of the TF command line output.

When using Team Explorer Everywhere clients our client will need access to the server for changelist information without being prompted for a password. To do this you will need to save your login information to your credentials cache using the TF_AUTO_SAVE_CREDENTIALS environment variable, which is documented [here](#). Once you have set this you will need to use a mutating command (such as checkout, checkin, and so on) and enter your credentials one more time for it to stick.

Technical Details and Limitations

Review Screen, Diff Viewer, Eclipse Plug-in and Visual Studio Extension display atomic changelists (changesets in terms of TFS) in chronological order (from older to newer), regardless the order in which they have been uploaded to review.

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you have "gaps" while adding subsequent atomic changelists (changesets in terms of TFS) to the same review. For example, add changelists 1, 2, and 4, but forget to add changelist 3.
- If you add pending changelists from different workspaces to the same review.
- If you add several diffs (non atomic changelists) to the same review.

6.8.1 GUI Client

Team Foundation Specific Options

The [SCM Configuration dialog](#)^[437] has several Team Foundation specific options.

Team Foundation SCM Configuration

Client configuration settings depend on whether you use a self-hosted version or a SaaS version of Team Foundation Server known as Visual Studio Team Services. If you use the latter, then you will need to set-up alternate authentication credentials at first and then use those credentials for Collaborator clients. See [next section](#)^[656] for configuration instructions.

You will need to specify the following parameters:

Local Source Code Location	The local path to Team Foundation Workspace on your computer.
TFS Collection URL	For self-hosted version of Team Foundation Server, specify the URL of Team Foundation Project Collection to work with.

For instance: *http://tfs.acme.com/my-collection*

For SaaS version of Team Foundation Server, specify the URL of your Visual Studio Team Services account (without project or collection names).

For instance: *http://jsmith-ts.visualstudio.com*

TFS User	The name of Team Foundation user. For SaaS version of Team Foundation Server, specify alternate primary user name.
TFS User Password	The password of the user. For SaaS version of Team Foundation Server, specify alternate password.

Client Configuration for Visual Studio Team Services

If you use Visual Studio Team Services (a SaaS version of Team Foundation Server), then you will need to set-up alternate authentication credentials at first and then use these credentials for Collaborator clients.

Enabling alternate authentication credentials

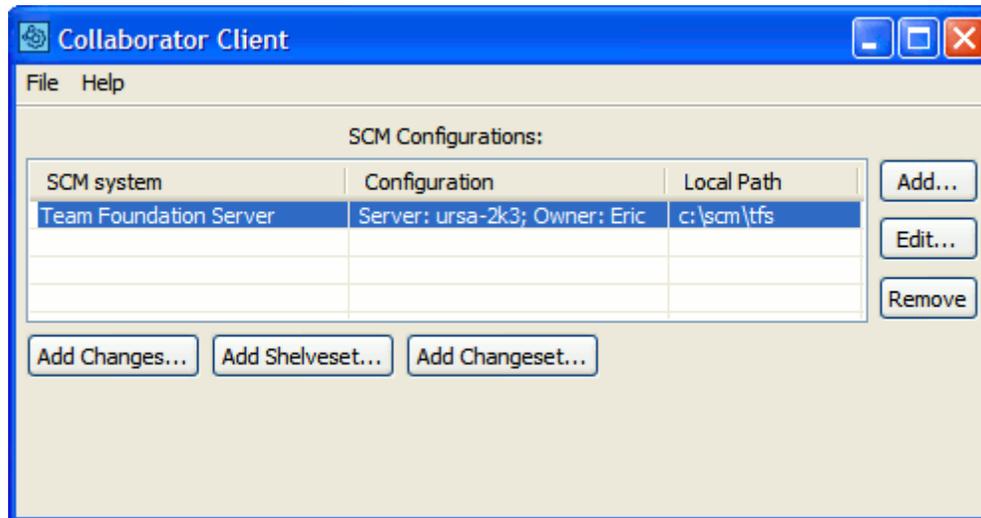
1. Login to your Visual Studio Team Services account (<https://your-team-services-account-name.visualstudio.com>),
2. Click on the Your Account icon in the top-right corner of the page,
3. Select Security,
4. Select Alternate authentication credentials,
5. Add new credentials. Collaborator clients use basic (user name and password) authorization.
6. Remember your primary user name and alternate credentials password.

Configuring Collaborator client

1. Enter your Visual Studio Team Services account URL (<https://your-team-services-account-name.visualstudio.com>) into **TFS Collection URL** field. Do not include project name, collection name (or anything else) into the account URL.
2. Enter your alternate primary user name into **TFS User** field.
3. Enter your alternate credentials password into **TFS User Password** field.

Uploading files to a Review

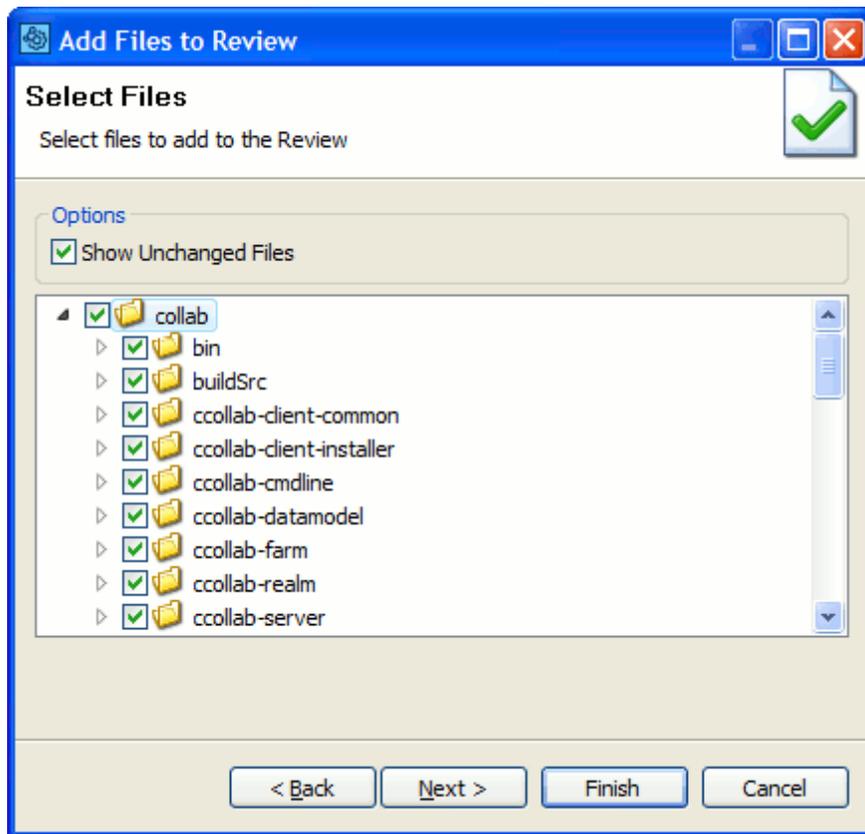
Selecting an Team Foundation SCM Configuration in the GUI Client [main screen](#)^[436] causes three Add to Review buttons to appear. The [Add Changes...](#)^[657] button uploads modified files in a Workspace. The [Add Shelvesets...](#)^[658] button uploads the files in Shelvesets. The [Add Changesets...](#)^[659] button uploads the files in committed Team Foundation Changesets.



Uploading Team Foundation files to a Review

Add Changes

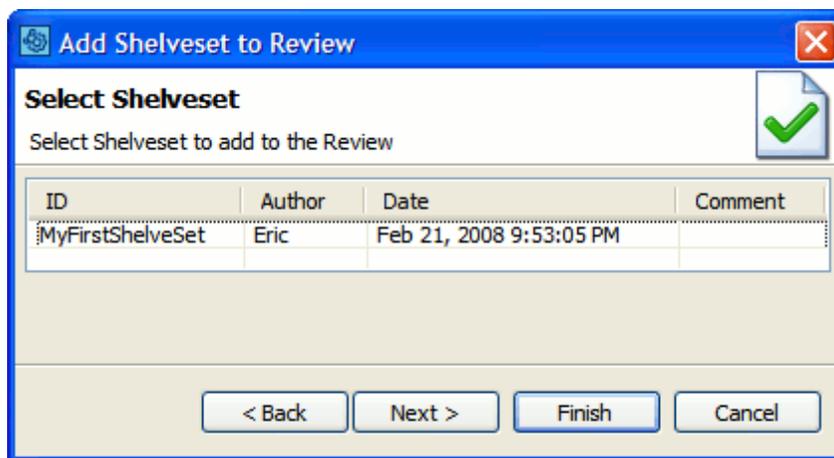
Press the *Add Changes...* button to upload modified files in a Workspace to the Collaborator Server for review.



Add Changes

Add Shelvesets

Press the *Add Shelvesets...* button to upload the files in a Shelveset to the Collaborator Server for review. See the *Add Changesets...* button if you want to add a Shelveset to the review that's not in your list of shelvesets.



Add Shelvesets

Add Changesets

Press the *Add Changesets...* button to upload the files in a Team Foundation Changeset to the Collaborator Server for review.

Select whether to display all available changesets, input ID's of particular changesets, list changelists within a specified range or within a specified date interval and press **List Changesets**. Then select the desired changesets in the table below and press **Next** to proceed.

Select Changesets
Select Changesets to add to the Review

List conditions

Select Team Project: Project2017_1

All changesets

Changesets by IDs

Changesets range

From: 10 To: (leave blank to list up to the latest changeset)

Created date

Between: 7/11/2016 And: 7/11/2017 **List Changesets**

ID	Author	Date	Comment
13	JSmith	Jun 13, 2017 2:48:22 ...	Improve sorting
12	Eric	Jun 6, 2017 6:58:01 PM	Fix foo bar
11	Eric	Jun 6, 2017 6:51:19 PM	Refactor algorithm
10	JSmith	Jun 6, 2017 6:50:43 PM	Fix statuses

< Back Next > Finish Cancel

Add Changesets

6.8.2 Gated Check-in Triggers

Collaborator provides special triggers that fire when someone submits files to a folder that is controlled by a gated check-in process in Team Foundation Server:

Trigger	Description
ensure-review-started	Ensures that a review has been started (created in Collaborator) for the submitted changelist.
ensure-completed	Ensures that a review has been completed for the submitted changelist.

These triggers ensure that files cannot be submitted unless a review for the respective changelist has been started (or completed). If the conditions are met, the commit will be allowed to continue normally.

The triggers work for Microsoft Team Foundation System 2018, 2017, 2015 and 2013. Currently, Update 1 and Update 1 Release 2 of Team Foundation System 2015 are not supported.

The triggers are implemented by dynamic-link libraries that you can download from the SmartBear web site as a .zip archive:

. <https://support.smartbear.com/downloads/collaborator/installers-for-collaborator-12/>

Installing Triggers

To install the triggers you will need to perform the following steps:

1) Download the .zip archive from the page mentioned above and unpack it to some folder on your computer.

The archive includes the *dlls* folder that have the dynamic-link libraries for the supported Visual Studio versions. Also, the archive includes a README file with instructions similar to those you can see below.

2) Open <Team Foundation Server>\Application Tier\Web Services\web.config file and append the following lines to the <appSettings> section:

```
<appSettings>
...
<!-- The following settings are for Collaborator triggers -->
<!-- Required setting -->
<add key="collab:serverUrl" value="http://yourcollabserver:port" />
<!-- Required setting -->
<add key="collab:userName" value="collabUser" />
<!-- Required setting. For an empty password, use value="" -->
```

```

<add key="collab:userPassword" value="collabPassword" />
<!-- Optional setting. Default is "started" -->
<add key="collab:triggerType" value="completed" />
...
</appSettings>

```

3) Copy the following DLLs from the unpacked *dlls*\<Your-Visual-Studio-version> folder to the <Team Foundation Server>\Application Tier\Web Services\bin\Plugins folder:

- collab-ensure-review-started-or-completed.dll
- log4net.dll

Linking Reviews and Commits

To use the triggers, you must require developers to put the review ID somewhere in the TFS commit message. The review ID must be specified in the **Review: NNN** format, where *NNN* stands for review number. Here is an example:

Commit message example:

TFS: Add support for gated check-ins (*Review: 12345*)

Collaborator uses the (`@"Review:*\s?(\d+)"`) regular expression to extract the review id from the commit information. This text can appear inline with other text or in a more formal "form-style" layout.

Troubleshooting

If you run across any issues or problems, it will help SmartBear technical support if you send in a debugging log. To capture a debugging log:

1) Open <Team Foundation Server>\Application Tier\Web Services\web.config file and append the following lines to the <configSections> section:

```

<configSections>
...
<!-- The following setting is for debugging Collaborator triggers -->
<section name="log4net" type="log4net.Config.
Log4NetConfigurationSectionHandler, log4net"/>
...
</configSections>

```

2) Also append the the following section to the `web.config` file:

```
<log4net debug="true">
  <appender name="LogFileAppender" type="log4net.Appender.
  FileAppender">
    <param name="File" value="C:/temp/collab_TFS_GatedCheckIn.log" />
    <param name="AppendToFile" value="true" />
    <layout type="log4net.Layout.PatternLayout">
      <param name="Header" value="[Header]\r\n" />
      <param name="Footer" value="[Footer]\r\n" />
      <param name="ConversionPattern" value="%d [%t] %-5p %c %m%n" />
    </layout>
  </appender>
  <root>
    <level value="DEBUG" />
    <appender-ref ref="LogFileAppender" />
  </root>
</log4net>
```

The above settings will generate the debugging log file at specified path.

3) Replace the DLLs in the Plugins folder with their fresh copy. This will force TFS to re-read the `web.config` file.

You may adjust the log output data for your needs by changing the above settings according to [log4net convention](#) of configuration files.

6.8.3 Command-Line Client

Commands recommended for Team Foundation Server

[ccollab addchanges](#)⁶⁶³ - Attaches locally-modified files to a review

[ccollab addchangelist](#)⁶⁶⁵ - Attaches an atomic changelist to a review

[ccollab commit](#)⁶⁶⁶ - Commit changes in the review

The `addchanges` command will upload local changes to files controlled by Team Foundation before they are checked in.

The `addchangelist` command will upload a the files in a Shelveset or Changeset.

Configuration

In most cases, the Command-Line Client can automatically detect your Team Foundation configuration. Try `testing your configuration` to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your Team Foundation configuration or you want to override the detected settings, you can manually specify Team Foundation settings using `global options`.

To manually configure the Command-Line Client to use Team Foundation, execute the following command:

```
ccollab set scm tfs
```

Team Foundation Server-specific Options

Client configuration settings depend on whether you use a self-hosted version or a SaaS version of Team Foundation Server known as Visual Studio Team Services. If you use the latter, then you will need to set-up alternate authentication credentials at first and then use these credentials for Collaborator clients. See `configuration instructions`.

Option	Description
<code>--tfs-collection <value></code>	For self-hosted version of Team Foundation Server, specify the URL of Team Foundation Project Collection to work with. For SaaS version of Team Foundation Server, specify the URL of your Visual Studio Team Services account (without project or collection names).
<code>--tfs-user <value></code>	The name of Team Foundation user. For SaaS version of Team Foundation Server, specify alternate primary user name.
<code>--tfs-passwd <value></code>	The password of the user. For SaaS version of Team Foundation Server, specify alternate password.

6.8.3.1 addchanges (for Team Foundation Server)

Description

The `ccollab addchanges` command uploads locally modified files controlled by Team Foundation Server to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchanges [--upload-comment <value>]
<review> <file-spec> [<file-spec> ...]
```

Command Options

Option	Required?	Description
global-options	No	A number of global or SCM-specific global options. See Command-line Global Options Reference ^[455] .
--upload-comment <value>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<file-spec> [<file-spec> ...]	Yes	Files to be added and/or folders to scan for modified files. Separate multiple file and folder names with spaces. If a file or folder name contains spaces, enclose this name in quotes. ccollab scans folders recursively. The resulting list includes the name of modified files. "Modifications" include include edits, additions, deletions, branches, integrations, moves, copies, and so on. After the scan is complete, a file list is presented in a graphical editor so you can review the files to be uploaded and make correct the list, if needed.

Examples:

To create a new review and add all changes in the current directory and below, plus the file foo.txt, you would use:

```
ccollab addchanges new . foo.txt
```

To upload modified files from the current working directory and all subdirectories to review 123:

```
ccollab addchanges 123 .
```

To upload file foo.txt and modified files from c:\dev\project into a brand new review:

```
ccollab addchanges new foo.txt c:\dev\project
```

6.8.3.2 addchangelist (for Team Foundation Server)

Description

The `ccollab addchangelist` command attaches all files from Team Foundation Server shelvesets or changesets to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchangelist <review> <changelist>
[<changelist> ...]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or AccuRev-specific global options. See Command-line Global Options Reference ^[455] .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<changelist> [<changelist> ...]	Yes	Identifier(s) of the desired changeset(s) or shelveset(s) in your source control.

The first argument is the review specifier, subsequent arguments are the IDs of the Shelvesets or Changesets to upload.

Note that the changesets are searched first - if a changeset is found, it will be added to the review. To avoid any naming conflicts, always use at least one non-numeric character in your shelveset names.

Examples:

To upload Shelvesets MyShelveset and todays_work to a new review:

```
ccollab addchangelist new MyShelveset todays_work
```

To upload Changesets C3 and C12654 to review 111:

```
ccollab addchangelist 111 3 12654
```

6.8.3.3 commit (for Team Foundation Server)

Description

The `ccollab commit` command submits the changes from a pre-commit review to source control. Be sure to include a relevant comment.

Command Line Syntax:

```
ccollab [global-options] commit [--comment <value>] [--dismiss-only]
[--force] <review>
```

Command Options

Option	Required?	Description
<code>--comment <value></code>	No	Comment for reviewed changes
<code>--dismiss-only</code>	No	Just dismiss the Action Item
<code>--force</code>	No	Ignore potential problems
<code><review></code>	Yes	Must be either an integer review-id, 'ask', or 'last'

Example:

```
ccollab commit 25 --comment "my code" --force
```

6.9 PTC Integrity Integration

Both GUI and command-line clients of Collaborator integrate with PTC Integrity:

- [GUI Client](#)^[668]

The GUI Client can find and upload changes by pending or committed PTC Change Packages, by specific file version number, or by modified working files in local sandboxes.

- [Command-Line Client](#)^[672]

The Command-Line Client can find and upload changes by pending or committed PTC Change Packages, or by modified working files in local sandboxes.

Supported PTC Integrity Versions

Collaborator uses Java client API that communicates with the PTC client (PTC Source) installed on your system. Collaborator supports the client versions starting from MKS Source 2007 and later (MKS Source and MKS Integrity are former names of PTC Source and PTC Integrity). MKS 2006 clients with the latest fix packs are also supported.

Since Collaborator works with a client applications that is installed on your computer, it supports all the protocols, authentication types, proxies, and other configuration options that you are using.

Windows Installation

On Windows operating systems, Collaborator's integration modules require 32-bit Java Runtime Environment. 64-bit JRE is not supported at the moment.

Linux Installation

To integrate with PTC Source on Linux, Collaborator's Java client API requires the following environment variables to be set:

```
export PATH=[integrity-client-install-dir]/bin:$PATH
export LD_LIBRARY_PATH=[integrity-client-install-dir]/lib/
linux:$LD_LIBRARY_PATH
```

Notes

If your PTC projects use variant sub-projects, then you may need to set the `-Dcom.smartbear.ptc.forceprojectpath=true` [VM option](#) ^[1100] on Collaborator clients to make the integration use project path instead of configpath.

Technical Details and Limitations

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you add several diffs (non atomic changelists) to the same review.

6.9.1 GUI Client

Setting PTC Integration Options

In order for Collaborator to be able to work with PTC Integrity, you need to specify connection settings in Collaborator's GUI Client.

To do this:

1. Launch the GUI Client.
2. Click **Add** on the main screen.
The Add SCM Configuration⁴³⁷ dialog will appear:

Add SCM Configuration

Local Source Code Location:

SCM:

SCM Specific Options

Server Name:
PTC Integrity server name (mks-host)

Server Port:
PTC Integrity server port (mks-port)

Username:
PTC Integrity user name (mks-user)

Password:
PTC Integrity user password (mks-passwd)

Expand keywords
Whether to expand keywords in PTC Integrity files (mks-expand-keywords)

Result Configuration

SCM:

Configuration:

PTC Source Control Settings

3. In the dialog:
 - Select **PTC Integrity** in the **SCM** drop-down list.

- Specify the desired PTC Integrity server (host), port, user name and password.

We would like to remind that there is no need to specify some or all of these settings, if your PTC Integrity client automatically connects to the PTC Integrity server using default local settings.

Known Issue: If your PTC Integrity server uses IPv6 connection, GUI Client cannot map the server host name. To workaround the issue, you will need to add the IPv6 address of your server to the hosts file on your machine. The hosts file resides at "/etc/environment/hosts" on Unix and at "%SystemRoot%\System32\drivers\etc\hosts" on Windows.

After you close the dialog, your PTC Integrity configuration will be added to the SCM Configurations list on the main window of the GUI Client.

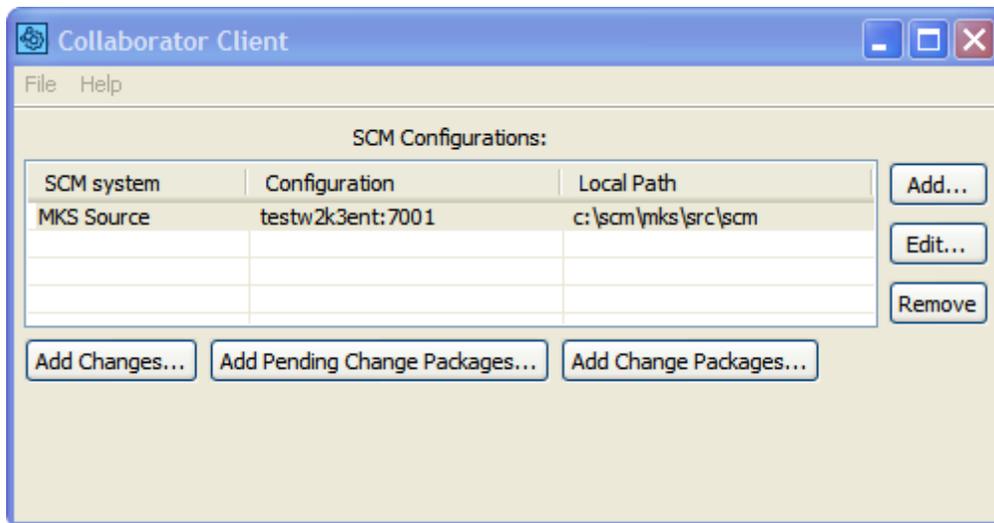
Adding Files to Review

To add files to a review:

1. In the **SCM Configurations** list on the GUI Client's main screen, select your PTC Integrity configuration.

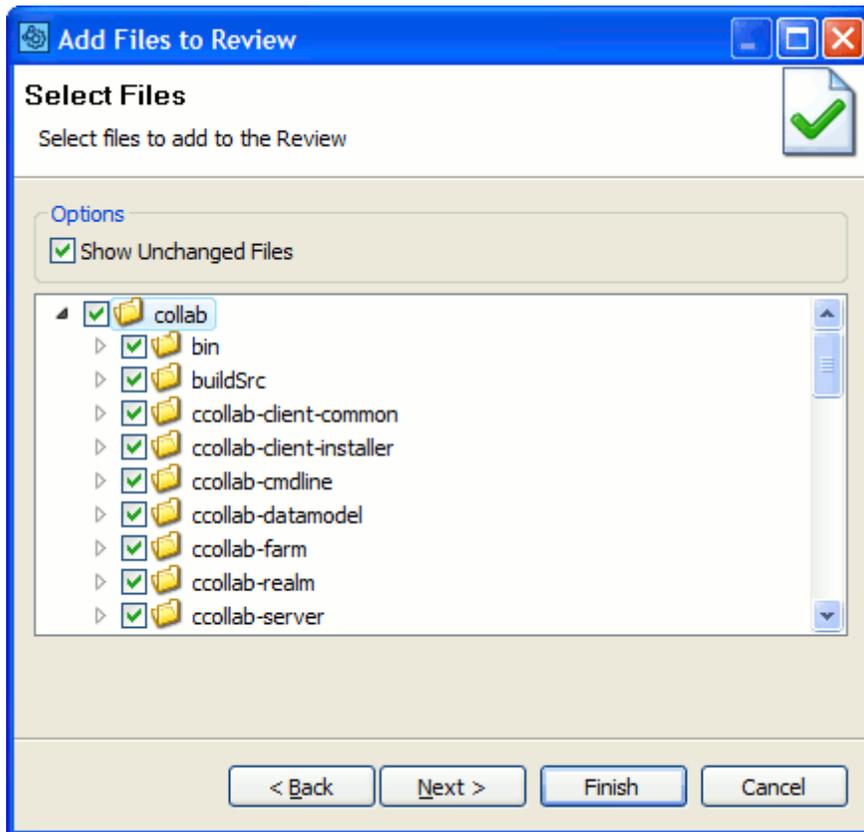
This will enable several "Add" buttons below the list.

2. Click these buttons to append files to a review on the Collaborator server.

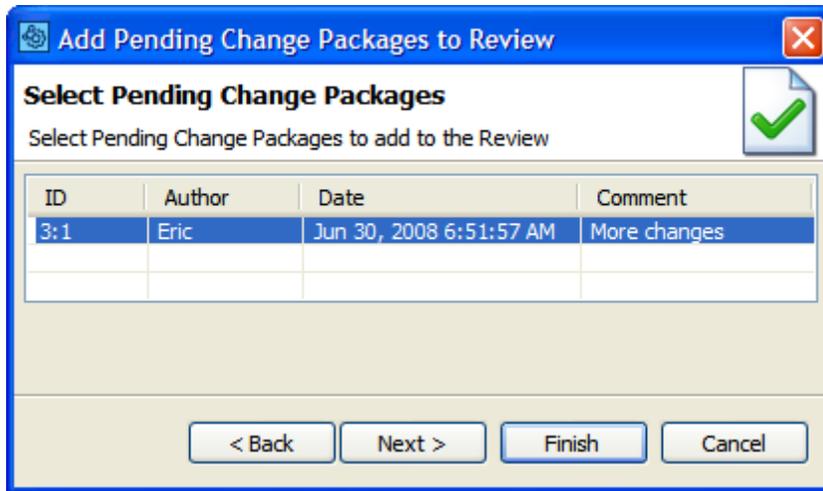


What Buttons Do

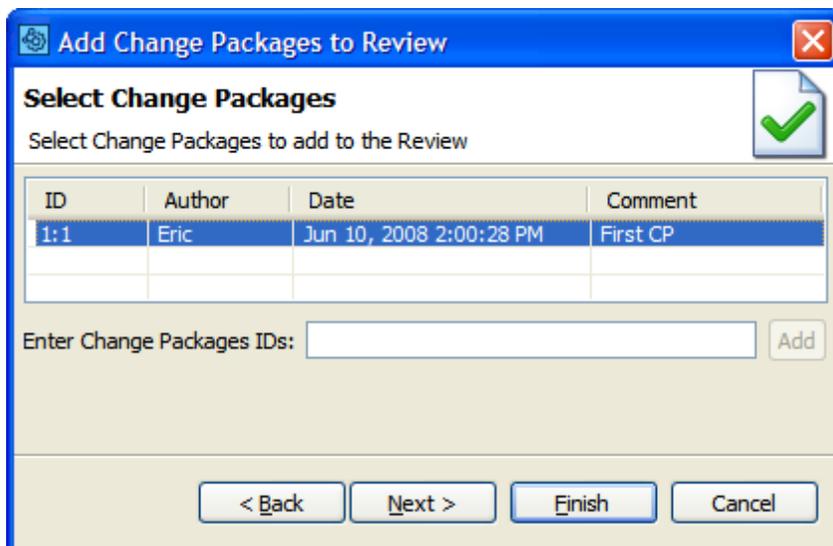
- **Add Changes** - Appends modified files from local PTC sandboxes. After you click the button, you can choose the files to be added:



- **Add Pending Change Packages** - Append all the files from a *pending* change package. Click the button and select the change package you need:



- **Add Change Packages** - Appends files from any change package from the user's sandbox to a review. Click the button and select the desired change package:



Note on Adding Change Packages

Adding a pending or committed change package to a review generates file differences based on [Multiple Version Changelists](#)⁸⁶⁵.

6.9.2 Command-Line Client

To work with PTC source clients, you can use the following Collaborator's:

- `ccollab addchanges`
- `ccollab addchangelist`
- `ccollab addversions`

Configuration

In most cases, the Command-Line Client can automatically detect your PTC configuration and connection settings. Try [testing your configuration](#)^[446] to check whether the settings are detected correctly.

If the Command-Line Client is unable to detect your PTC configuration, or if you want to override the detected settings, you can manually specify PTC settings using [global PTC settings](#)^[456].

To manually configure the Command-Line Client to use PTC, run the following command-line:

```
ccollab set scm[456] mks
```

Global PTC-Specific Command-Line Options

Option	Description
<code>--mks-host <value></code>	PTC Integrity server name.
<code>--mks-port <value></code>	PTC Integrity server port.
<code>--mks-user <value></code>	PTC Integrity user name.
<code>--mks-passwd <value></code>	PTC Integrity user password.
<code>--mks-expand-keywords</code>	Specifies whether to expand keywords in source files.

The arguments use the `--mks` prefix as MKS Integrity is a former name of PTC Integrity.

6.9.2.1 addchanges (PTC Integrity Integration)

Description

The `ccollab addchanges` command appends files that are controlled by PTC Integrity client (PTC Source) and that are located on your computer to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchanges [--upload-comment <value>]  
<review> <file-spec> [<file-spec> ...]
```

Command Options

Option	Required?	Description
global-options	No	A number of global or PTC-specific global options. See Command-line Global Options Reference ^[455] .
--upload-comment <value>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<file-spec> [<file-spec> ...]	Yes	Files to be added and/or folders to scan for modified files. Separate multiple file and folder names with spaces. If a file or folder name contains spaces, enclose this name in quotes. ccollab scans folders recursively. The resulting list includes the name of modified files. "Modifications" include include edits, additions, deletions, branches, integrations, moves, copies, and so on. After the scan is complete, a file list is presented in a graphical editor so you can review the files to be uploaded and make correct the list, if needed.

Examples:

The following command line creates a new review and add all changes in the current folder and its subfolders, plus the *foo.txt* file, to the new review:

```
ccollab addchanges new . foo.txt
```

The following command line uploads modified files from the current working folder and its subfolders to review with the identifier 157:

```
ccollab addchanges 157 .
```

The following command uploads the *foo.txt* file and modified files from the *c:\dev\project* folder to the review, to which you uploaded files last time:

```
ccollab addchanges last foo.txt c:\dev\project
```

6.9.2.2 addchangelist (PTC Integrity Integrion)

Description

The `ccollab addchangelist` command attaches all files from a change package controlled by PTC Integrity client (PTC Source) to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchangelist <review> <changelist>
[<changelist> ...]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or PTC-specific global options. See Command-line Global Options Reference ^[455] .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<changelist> [<changelist> ...]	Yes	Identifier(s) of the desired changeset(s) in your source control.

Examples:

The following command uploads the change packages 1:2 and 3:2 to a new review:

```
ccollab addchangelist new 1:2 3:2
```

The following command adds the change packages 1:1 and 3:1 to the review with the identifier 182:

```
ccollab addchangelist 182 1:1 3:1
```

6.9.2.3 addversions (PTC Integrity Integration)

Description

The `ccollab addversions` command appends the specified versions (revisions) of a file controlled by the PTC Integrity client (PTC Source) on your computer to a review.

Command Line Syntax:

```
ccollab [global-options] addversions [--upload-comment <value>] [--
version-spec <value> [<value> ...]] <review> [<file-path>]
[<version>] [<predecessor-version>]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or PTC-specific global options. See Command-line Global Options Reference ^[455] .
--upload-comment <value>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
--version-spec <value> [<value> ...]	No	The version to be added to a review. A version-spec value consist of three components: <p style="text-align: center;"><i>path version [previous-version],</i></p> <p>where <i>path</i> is the file name or server path of the file, <i>version</i> is the file version to be reviewed, and <i>previous-version</i> is an optional version, against which <i>version</i> should be compared.</p> <p>If any of these arguments contains spaces, enclose it in quotes.</p> <p>Typically a version-spec is not used in the command line. We recommend specifying the file and version using the <file-path>, <version> and the <predecessor-version> arguments (see below).</p>
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<file-path>	No	The path of the file whose versions are to be added to the review. If filename is omitted, entire directory will be added.

Option	Required?	Description
		Important: If you use this option, you should also specify <version> (see below).
<version>	No	Required, if <file-path> is specified. The version (revision) of the file to be added to the review. You can specify the keyword <i>local</i> to tell the command to use the local version of the file.
<predecessor-version>	No	Preceding file version to be added to the review. If you skip this argument, Collaborator will attempt to determine the preceding version based on the information from the PTC Integrity source control.

Examples:

The following command line adds versions (revisions) 1.95 and 1.88 of the hello.c file to the review 861:

```
ccollab addversions 861 ./hello.c 1.95 1.88
```

The following command adds these revisions to a new review:

```
ccollab addversions new ./hello.c 1.95 1.88
```

Remarks

- If you skip the predecessor version, Collaborator will generate diffs using the predecessor version reported by your source control system.
- By default, the command lets you add versions of one file only. To add versions of multiple files, create a text file and specify this file in the command line as the standard input stream (stdin):

```
ccollab addversions last < versionlist.txt
```

Each line in the file must consist of the following components: *path version [predecessor-version]*.

For information on them, see description of the `version-spec` arguments.

- If you skip the file name and versions in the command line, the command will expect to read them from the standard input stream (stdin). Below are some examples for reading versions from the standard input:

```
ccollab addversions 86753
```

```
ccollab addversions last < versionlist.txt
cat versionlist.txt | ccollab addversions new
```

- When specifying the version in the command line or in an input file, you can use the keyword *local* to denote the version corresponding to the local version of the file. The *local* keyword can only be used for the first version argument, not for the predecessor version.

6.10 Perforce Integration

This section describes Collaborator integration with Perforce:

Perforce Server Integration

The Collaborator server can pull submitted changelists directly from your Perforce server for review, without users needing to install any client programs. It can also [enforce file content access permissions](#)  (protections) configured in Perforce.

GUI Client

The GUI Client can upload Changelists into Collaborator. You can upload [Pending](#)  or [Submitted](#)  Changelists, but you cannot upload the Default Changelist. The GUI Client can also upload [arbitrary Perforce diffs](#) , files in a [Branch](#) , or the difference between two [Labels](#)  or [dates](#) .

Command-Line Client

The Command-Line Client can upload Changelists into Command-Line Client. You can upload Changelists Pending or Submitted Changelists, but you cannot upload the Default Changelist. The Command-Line Client can also upload arbitrary Perforce diffs.

Eclipse Plug-in

The [Eclipse Plug-in](#)  can [upload](#)  Perforce changelists. Just right-click on any changelist entry in Eclipse, either before or after it is submitted.

P4V and P4Win

Collaborator comes with [plug-ins to P4V and P4Win](#)  that let you right-click on any changelist (pending or submitted) and add to a new or existing review.

Perforce Server Triggers

Perforce server-side triggers can [ensure code is reviewed](#)^[70]. There is also a trigger to automatically [update a changelist](#)^[70] with information about the review of that changelist.

Perforce Changelist Renumbering

Perforce nearly always renumbers changelists upon submission, but when you are doing pre-commit reviews Collaborator always has the pre-submit number. We have included a script you can customize that will ask Perforce what a changelist's number was before it was submitted, and update changelists in Collaborator to have the new number. This requires a Collaborator client and server **5.0.5005** or better, and a Perforce client and server **2007.3** or later. This script is intended to be run periodically via `cron` or a similar task scheduler. [Perforce Changelist Renumbering Script](#)

Supported Versions

Our integration uses your own Perforce command-line client (`p4`) to communicate with the server. We support all client and server versions later than **2002.1**. Our Eclipse Plug-in supports Perforce's eclipse plugin version **2009.2.234487** or later.

Because we use client applications already present on your computer, we support all protocols, authentications, proxies, and other client configuration options you are currently using. This includes configuration from environment variables, `$P4CONFIG` files, `p4 set` registry values, and so forth.

Support for Branch / Integrate

Collaborator fully supports Perforce's file branching and integration semantics.

If files in a changelist are marked for branching, they are not considered "changed". The file content itself is not changed; only the file paths are being changed.

If files in a changelist are being integrated, this works just like a regular change. Many customers choose to review integrations especially carefully since the changes might interact in unexpected ways.

Support for Copy / Move

Collaborator fully supports Perforce's file copy/move semantics. Thus, if a file is copied or moved rather than added from scratch, it will show up that way in the various user interfaces.

Support for Directory-level New/Delete/Copy/Move

Collaborator partially supports Perforce's concept of directories (not just files) being altered.

All files underneath the directories in question will be scanned, uploaded and represented properly in the GUI. The directories themselves will *not* be shown in any GUI.

Support for Shelvesets

Collaborator supports adding Perforce Shelvesets to reviews.

Additional Information About Mark for Delete

If you want to use "Mark for Delete" on a file and add this file to the newly created Collaborator review, synchronize this file with the depot. Otherwise, this file can be absent from your Perforce workspace and Collaborator will return an exception.

Technical Details and Limitations

Review Screen, Diff Viewer, Eclipse Plug-in and Visual Studio Extension display atomic changelists in chronological order (from older to newer), regardless the order in which they have been uploaded to review.

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you have "gaps" while adding subsequent atomic changelists to the same review. For example, add changelists 1, 2, and 4, but forget to add changelist 3.
- If you add pending changelists from different workspaces to the same review.
- If you add several diffs (non atomic changelists) to the same review.

6.10.1 Perforce Server Integration

The Collaborator server can be configured to communicate directly with your Perforce server. This allows users to review submitted changelists completely from the browser, without having to install any client programs. To enable this feature, first install and configure a Perforce client on the Collaborator server and then create an entry for your Perforce server in the [Version Control](#) ¹⁹⁴ tab of the administration interface. Version control server entries are also created automatically if one of the client programs uploads files from a server that does not match any of the currently configured servers.

Edit Perforce Configuration: Jason's Perforce Server

Title:	<input type="text" value="Jason's Perforce Server"/>
Attach changelists from browser:	<input type="button" value="Disabled"/> Allow users to attach committed changelists from this server to a review directly from the Web UI, without having to install any client programs.
P4 Executable:	<input type="text" value="C:\Program Files\Perforce\p4.exe"/> Full path to the P4 executable
P4PORT:	<input type="text" value="perforce.smartbear.com:1666"/> How to connect to the Perforce server
P4USER:	<input type="text"/> Perforce user name
P4PASSWD:	<input type="text"/> Perforce password or ticket
P4CHARSET:	<input type="text"/> Perforce character set used for translation of Unicode files

Title	The title is displayed to users, so it should be something that everyone will understand, even if they are going through proxies, VPNs, or other such things. When a version control server entry is created automatically, this is filled in with the server address (p4port) of the server.
Attach changelists from browser	If enabled, this feature lets users select submitted changelists to review directly from the web browser, without having to install any client programs.
P4 Executable	Full path to the P4 executable
P4PORT	Address to use to connect to the server. When a version control server entry is created automatically, this is filled in with the server address obtained from the client.
P4USER	Perforce user name
P4PASSWD	Perforce password or ticket
P4CHARSET	Perforce character set used for translation of Unicode files

Perforce Protections

The Collaborator server can be configured to check Perforce protections with the Perforce server whenever a user tries to access a file.

Protections

Enforce Protections:	<input type="text" value="No"/> Check access permission with version control server when a user tries to access the content of a managed file.
P4 Protects Script:	<input type="text"/> Script to run instead of calling 'p4 -s protects' directly, with arguments -p <p4port> -u <user> -h <host> <depotPath> If no script is specified then the Perforce user above must have Perforce 'super' permission.
<input type="button" value="Test Connection"/> <input type="button" value="Save"/> <input type="button" value="Revert"/>	

When enabled, Collaborator will check access permission with your Perforce server whenever a user tries to access the content of a file managed by this server. Note that this assumes that the user's Perforce username is the same as their Collaborator login.

To check Perforce protections the configured `P4USER`^[68] must have Perforce "super" permission. If you do not want to provide an account with that level of permission, you can instead configure a script for Collaborator to run instead of calling 'p4 -s protects' directly.

The script will be passed arguments "-p <p4port> -u <user> -h <host> <depotPath>". For example, this script could be implemented as a Windows batch file:

```
@p4 -u admin -s -p %2 protects -u %4 -h %6 %7
```

The script must produce *exactly* the same stdin, stdout, and process error code as if Collaborator ran "p4 -s protects" directly. Also make sure the script runs as fast as possible, because it will be invoked every time any user tries to view the contents a file from this server.

Client Configuration Mapping

You can supply Java-style regular expressions to map changelists uploaded from our client tools to this Perforce server. It is important to set up these regular expressions so that files uploaded by the various Collaborator client tools are correctly associated with this server-side Perforce configuration.

P4PORT Pattern:	<input type="text"/>
Server Address Pattern:	<input type="text" value="\Qperforce.smartbear.com:1666\E"/>
<input type="button" value="Save"/> <input type="button" value="Revert"/>	

P4PORT Pattern	Match on the client's configured P4PORT. Using the Server Address Pattern ⁶⁸³ is better, but clients before 5.0.5009 did not upload "Server Address", so you can configure this as a fallback.
Server Address Pattern	Match on the "Server Address" returned from running " p4 -p <p4port> info" on the client. This is generally more reliable than matching on the P4PORT, and works through Perforce proxy servers and other complications. When a version control server entry is created automatically, this is filled in with the server address obtained from the client.

6.10.2 GUI Client

Perforce-specific Options

The [SCM Configuration dialog](#)⁴³⁷ has several Perforce-specific options. These can be set as necessary to override Perforce options derived from the environment.

Add SCM Configuration

Local Source Code Location:

SCM:

SCM Specific Options

P4 Executable:
Full path to the P4 executable (p4)

P4PORT:
How to connect to the Perforce server (p4port)

P4USER:
Perforce user name (p4user)

P4PASSWD:
Perforce password or ticket (p4passwd)

P4CLIENT:
Mapping of Perforce server data to the local machine (p4client)

Ignore Integration History
Ignore integration history when calculating predecessor (p4-ignore-integration-history)

P4CHARSET:
Perforce character set used for translation of Unicode files (p4charset)

Require empty default changelist
If true, don't allow uploads if the default changelist contains files (p4-require-empty-default-changelist)

Specify Perforce command charset
Should a character set be specified for communication with Perforce (p4-specify-command-charset)

Result Configuration

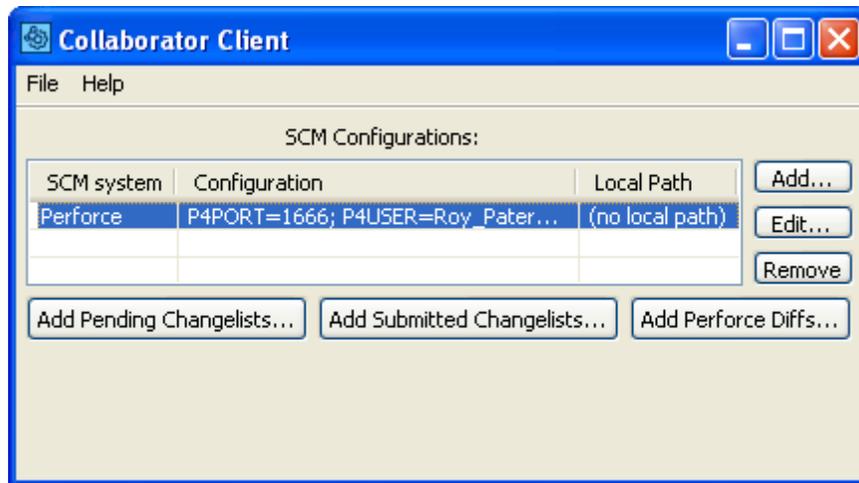
SCM:

Configuration:

Perforce SCM Configuration

Uploading files to a Review

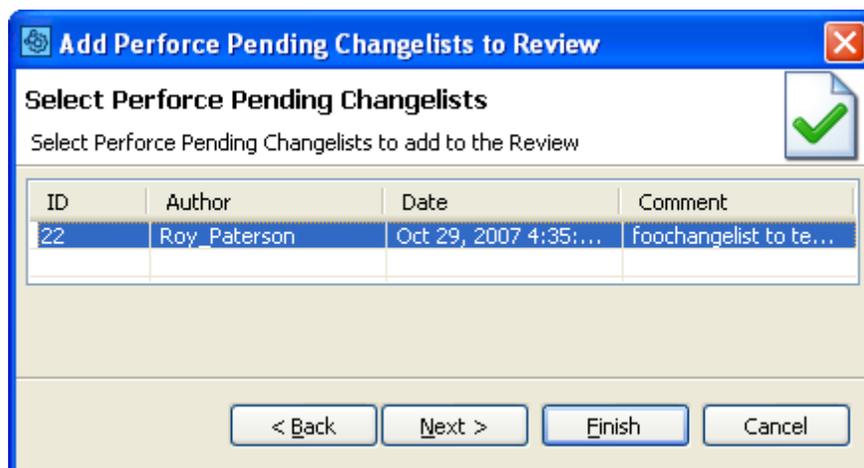
Selecting a Perforce SCM Configuration in the GUI Client [main screen](#)^[436] causes several Add to Review buttons to appear. The [Add Pending Changelists...](#)^[685] button uploads numbered, pending changelists. The [Add Submitted Changelists...](#)^[686] button uploads submitted changelists. The [Add Perforce Diffs...](#)^[686] button uploads arbitrary diffs, compares files in a [Branch](#)^[687], or compares the difference between two [Labels](#)^[688] or [dates](#)^[689].



Uploading Perforce files to a Review

Add Perforce Pending Changelists

Press the [Add Perforce Pending Changelists...](#) button to upload the files in a Perforce pending changelist to the Collaborator Server for review. You cannot upload the default changelist.



Add Perforce Pending Changelists

Add Perforce Submitted Changelists

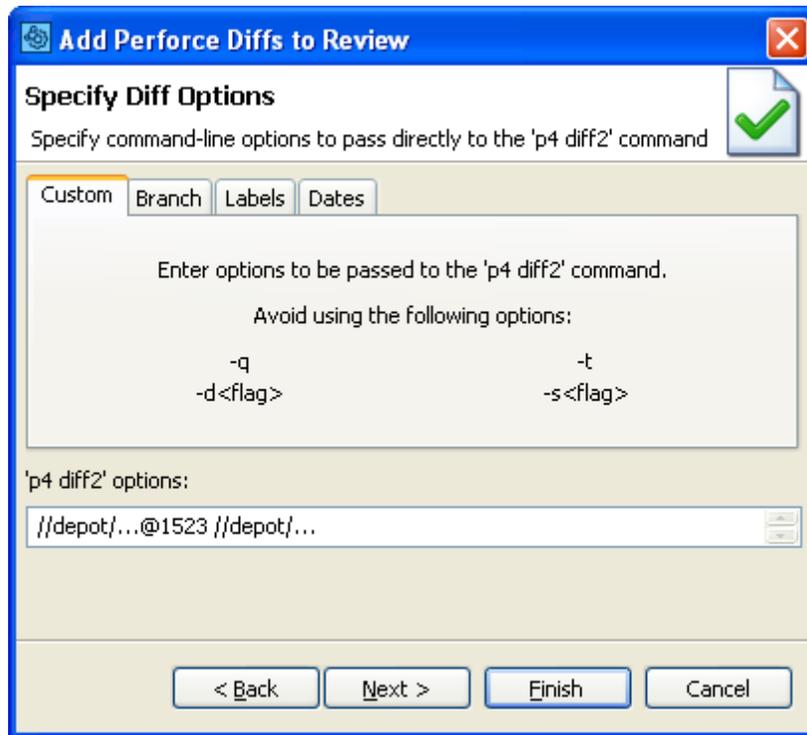
Press the *Add Perforce Submitted Changelists...* button to upload the files in a Perforce submitted changelist to the Collaborator Server for review.



Add Perforce Submitted Changelists

Add Perforce Diffs

Press the *Add Perforce Diffs...* button to upload arbitrary Perforce diffs to the Collaborator Server for review.

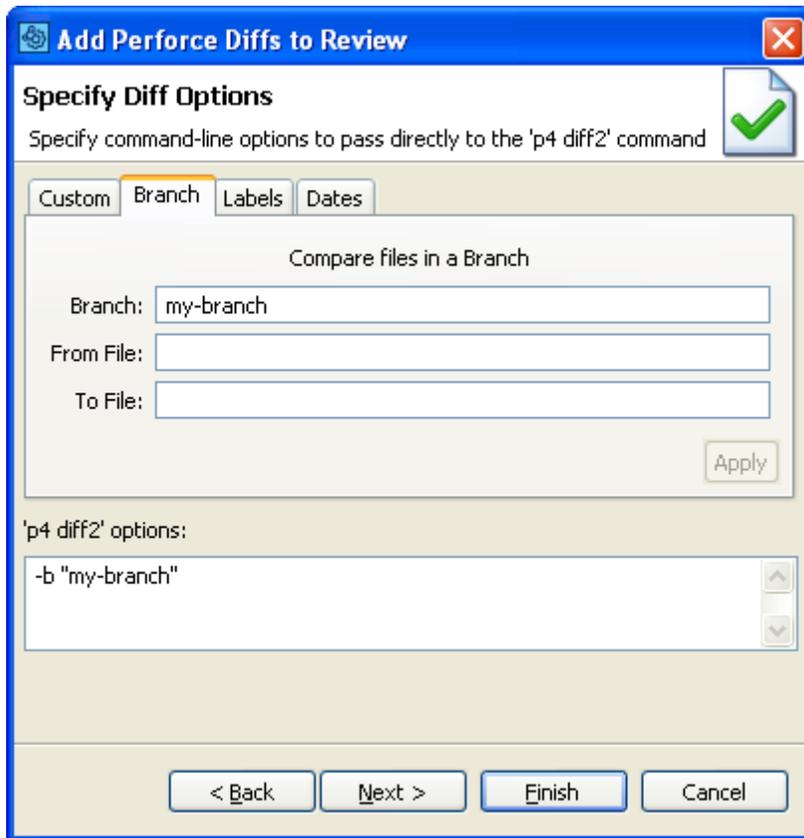


Add Perforce Diffs

You can enter arbitrary Perforce diff options, compare files in a [Branch](#)^[687], or compare the difference between two [Labels](#)^[688] or [dates](#)^[689].

6.10.2.1 Comparing files in a Branch

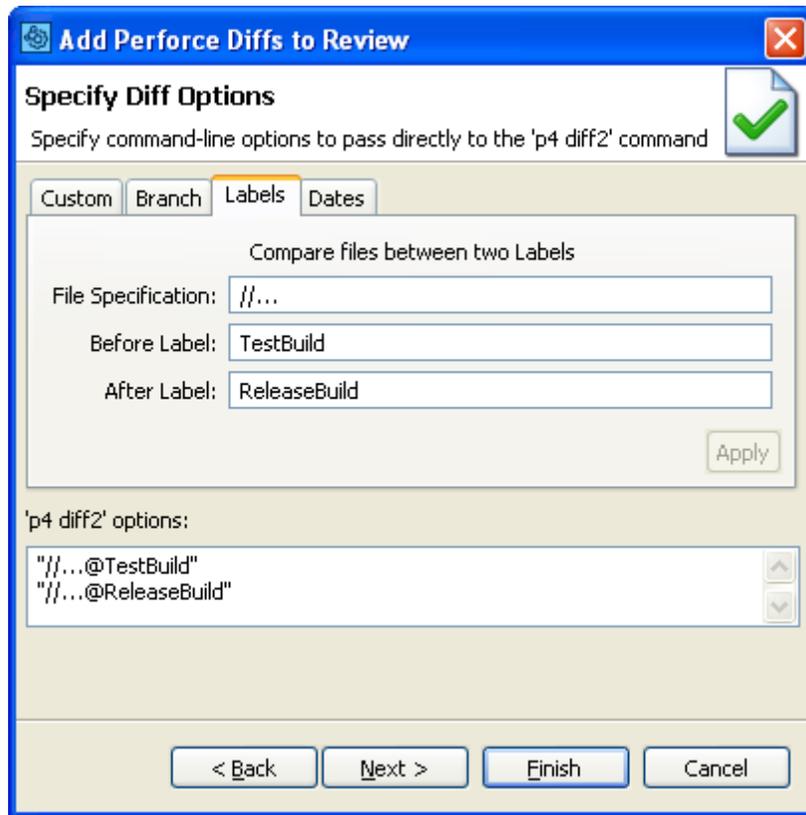
Press the [Add Perforce Diffs...](#)^[686] button on the [main screen](#)^[435] and then select the *Branch* tab to upload the files in a Branch.



Upload the files in a Branch

6.10.2.2 Comparing two Labels

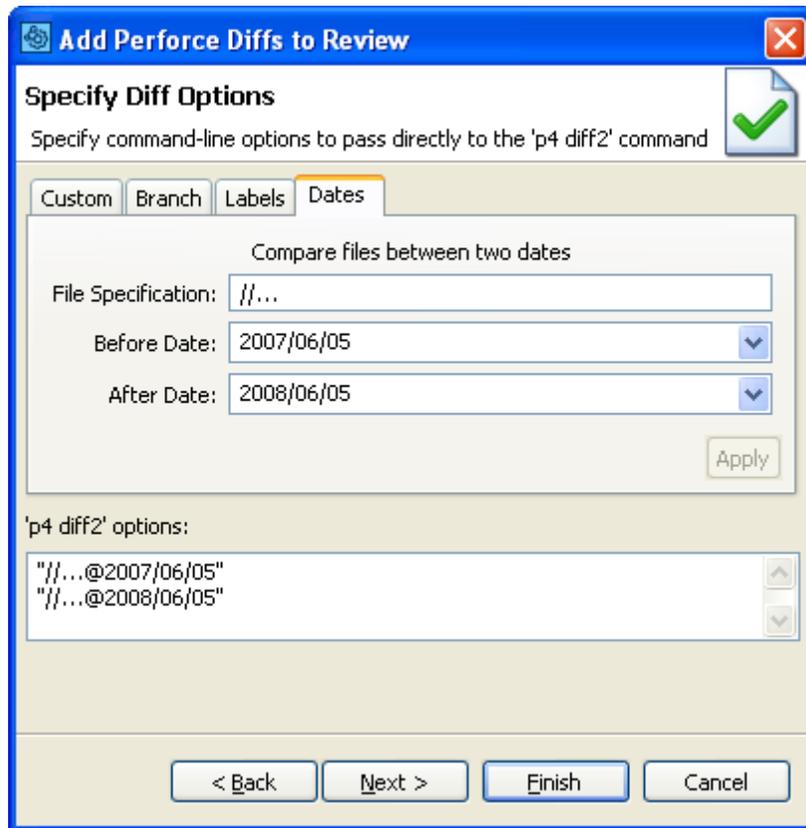
Press the [Add Perforce Diffs...](#)^[686] button on the [main screen](#)^[435] and then select the *Labels* tab to upload the difference between two Labels.



Upload the difference between two Labels

6.10.2.3 Comparing two dates

Press the Add Perforce Diffs...⁶⁸⁶ button on the main screen⁴³⁵ and then select the Dates tab to upload the difference between two dates.



Upload the difference between two dates

6.10.3 Command-Line Client

Commands recommended for Perforce

`ccollab addchangelist`^[692] - Attaches an atomic changelist to a review

`ccollab addp4diffs`^[693] - Uploads diffs generated from p4 diff2 command

`ccollab addversions`^[694] - Attaches any 2 given versions to a review

`ccollab commit`^[696] - Commit changes in the review

`ccollab addp4job`^[697] - Adds all numbered local changes that fix a job to the review

`ccollab admin syncusers`^[698] - Synchronizes the Perforce user list with the Collaborator server

`ccollab admin changelist update-id`^[699] - Updates the changelist ID so Collaborator reflects the renumbered Perforce changelist ID

The `addchangelist` command will upload Perforce changelists into Collaborator. You can upload changelists either before or after they are submitted, but you cannot upload the default changelist.

Configuration

In most cases, the Command-Line Client can automatically detect your Perforce configuration. Try [testing your configuration](#) to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your Perforce configuration or you want to override the detected settings, you can manually specify Perforce settings using [global options](#).

To manually configure the Command-Line Client to use Perforce, execute the following command:

```
ccollab set scm performance
```

Perforce-specific Options

Option	Description
<code>--p4 <value></code>	Full path to the P4 executable
<code>--p4port <value></code>	How to connect to the Perforce server
<code>--p4user <value></code>	Perforce user name
<code>--p4passwd <value></code>	Perforce password or ticket
<code>--p4client <value></code>	Mapping of Perforce server data to the local machine
<code>--p4-ignore-integration-history <value></code>	Ignore integration history when calculating predecessor
<code>--p4charset <value></code>	Perforce character set used for translation of Unicode files
<code>--p4-require-empty-default-changelist</code>	If true, do not allow uploads if the default changelist contains files

Option	Description
<code>--p4-specify-command-charset <value></code>	Should a character set be specified for communication with Perforce

If your Perforce server requires ticket-based authentication (server security level 3) then the configured `p4passwd` will be used to automatically issue 'p4 login' and acquire a new ticket as necessary.

If you want to ignore the integration history of files when determining the previous version of the file and look only at the path you should set `p4-ignore-integration-history` to `yes` like so:

```
ccollab set p4-ignore-integration-history yes
```

Note for Windows users: Sometimes Perforce server uses Windows machine host name as a default name, ignoring the real Perforce client name. To avoid that issue, specify the needed Perforce client name directly in the Collaborator with the `--p4client <name>` command.

6.10.3.1 addchangelist (for Perforce)

Description

The `ccollab addchangelist` command attaches all files from a pending or a submitted Perforce changelist to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchangelist <review> <changelist>
[<changelist> ...]
```

Command Options

Option	Required?	Description
<code>[global-options]</code>	No	A number of global or Perforce-specific global options. See Command-line Global Options Reference ⁴⁵⁵ .
<code><review></code>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.

Option	Required?	Description
<code><changelist></code> <code>[<changelist> ...</code> <code>]</code>	Yes	Identifier(s) of the desired changeset(s) in your source control.

The first argument is the review specifier, subsequent arguments are the IDs of the Pending Changelists or Submitted Changelists to upload.

You cannot specify the default changelist.

Examples:

To upload Pending Changelists @4321 and @7568 to a new review:

```
ccollab addchangelist new 4321 7568
```

To upload Submitted Changelists @5432 and @12654 to review 111:

```
ccollab addchangelist 111 5432 12654
```

6.10.3.2 addp4diffs

Description

The `ccollab addp4diffs` command uploads differences between arbitrary versions of files in Perforce. The differences are generated using the native 'p4 diff2' command of Perforce.

Command Line Syntax:

```
ccollab [global-options] addp4diffs [--upload-comment <value>]
<review> [<p4-diff-arg> [<p4-diff-arg> ...]]
```

Command Options

Option	Required?	Description
<code>--upload-comment</code> <code><value></code>	No	Comment used to upload files (defaults to command-line arguments)
<code><review></code>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'

Option	Required?	Description
<p4-diff-arg> [<p4-diff-arg> ...]	No	Options which should be passed to the p4 diff2 command

Remarks:

Do not use diff arguments that affect the diff output such as '-q', '-t', '-d<flag>', or '-s<flag>'. The Collaborator command-line client will automatically select an output format that ensures you will get all the data you need on the server.

Examples:

```
ccollab addp4diffs 698 //depot/file1 //depot/file2
ccollab addp4diffs new //depot/...@1523 //depot/...
ccollab addp4diffs 698 -b my-branch
```

6.10.3.3 addversions (for Perforce)

Description

The `ccollab addversions` command appends the specified versions (revisions) of a file controlled by Perforce on your computer to a review.

Command Line Syntax:

```
ccollab [global-options] addversions [--upload-comment <value>] [--
version-spec <value> [<value> ...]] <review> [<file-path>]
[<version>] [<predecessor-version>]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or Perforce-specific global options. See Command-line Global Options Reference ⁴⁵⁵ .
--upload-comment <value>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .

Option	Required?	Description
<pre>--version-spec <value> [<value> ...]</pre>	No	<p>The version to be added to a review. A version-spec value consist of three components:</p> <p style="text-align: center;"><i>path version [previous-version],</i></p> <p>where <i>path</i> is the file name or server path of the file, <i>version</i> is the file version to be reviewed, and <i>previous-version</i> is an optional version, against which <i>version</i> should be compared.</p> <p>If any of these arguments contains spaces, enclose it in quotes.</p> <p>Typically a version-spec is not used in the command line. We recommend specifying the file and version using the <file-path>, <version> and the <predecessor-version> arguments (see below).</p>
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<file-path>	No	<p>The path of the file whose versions are to be added to the review. If filename is omitted, entire directory will be added.</p> <p>Important: If you use this option, you should also specify <version> (see below).</p>
<version>	No	<p>Required, if <file-path> is specified.</p> <p>The version (revision) of the file to be added to the review. You can specify the keyword <i>local</i> to tell the command to use the local version of the file.</p>
<predecessor-version>	No	Preceding file version to be added to the review. If you skip this argument, Collaborator will attempt to determine the preceding version based on the information from the source control.

Examples:

The following command line adds versions (revisions) 1.95 and 1.88 of the `hello.c` file to the review 861:

```
ccollab addversions 861 ./hello.c 1.95 1.88
```

The following command adds these revisions to a new review:

```
ccollab addversions new ./hello.c 1.95 1.88
```

Remarks

- If you skip the predecessor version, Collaborator will generate diffs using the predecessor version reported by your source control system.
- By default, the command lets you add versions of one file only. To add versions of multiple files, create a text file and specify this file in the command line as the standard input stream (stdin):

```
ccollab addversions last < versionlist.txt
```

Each line in the file must consist of the following components: *path version [predecessor-version]*.

For information on them, see description of the `version-spec` arguments.

- If you skip the file name and versions in the command line, the command will expect to read them from the standard input stream (stdin). Below are some examples for reading versions from the standard input:

```
ccollab addversions 86753
ccollab addversions last < versionlist.txt
cat versionlist.txt | ccollab addversions new
```

- When specifying the version in the command line or in an input file, you can use the keyword *local* to denote the version corresponding to the local version of the file. The *local* keyword can only be used for the first version argument, not for the predecessor version.

6.10.3.4 commit (for Perforce)

Description

The `ccollab commit` command submits the changes from a pre-commit review to source control. Be sure to include a relevant comment.

Command Line Syntax:

```
ccollab [global-options] commit [--comment <value>] [--dismiss-only]
[--force] <review>
```

Command Options

Option	Required?	Description
<code>--comment <value></code>	No	Comment for reviewed changes
<code>--dismiss-only</code>	No	Just dismiss the Action Item
<code>--force</code>	No	Ignore potential problems. Must be authenticated as Perforce user with administrator or super access rights. See Remarks.
<code><review></code>	Yes	Must be either an integer review-id, 'ask', or 'last'

Remarks

To use this command (without the `--force` option) your Perforce user name (`--p4user`) should coincide with the name of a user who has submitted the desired changelist. If you use the `--force` option, then you must specify a Perforce user having administrator or super access rights.

Example:

```
ccollab commit 25 --comment "my code" --force
```

6.10.3.5 addp4job

Description

The `ccollab commit` command adds all numbered local changes that fix a job to the review.

Command Line Syntax:

```
ccollab [global-options] addp4job <review> <job-name>
```

Command Options

Option	Required?	Description
<review>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<job-name>	Yes	Perforce changes that fix this job will be added to the review

Example:

```
ccollab addp4job new new_job
```

6.10.3.6 syncusers

Description

The `ccollab admin syncusers` command synchronizes the Perforce user list with the Collaborator server. All users from Perforce will be mirrored into Collaborator.

Command Line Syntax:

```
ccollab [global-options] admin syncusers
```

Remarks:

- The algorithm is smart enough not to overwrite existing users, only adding new users, so this can be run periodically by a script to keep the lists in sync.
- This is not necessary -- or desirable -- if you are using LDAP authentication.
- You must be logged in as an administrator to execute this command.

6.10.3.7 update-id

Description

The `ccollab admin changelist update-id` command updates all references to the old changelist ID so Collaborator reflects the renumbered Perforce changelist ID.

Command Line Syntax:

```
ccollab [global-options] admin changelist update-id <old-id> <new-id>
```

Command Options

Option	Required?	Description
<old-id>	Yes	Old ID of Perforce changelist.
<new-id>	Yes	New ID of Perforce changelist.

Example:

```
ccollab --scm p4 --p4port p4server:1666 admin changelist update-id 123 147
```

6.10.4 P4V / P4Win Integration

The Collaborator client installer includes an integration point with **P4V** and **P4Win**. When you right-click on one or more Changelists in the GUI a new menu item appears at the bottom of the Tools menu allowing you to add those Changelists to a Review.

Installation

If you installed the client yourself and opted to "[Configure Addons To Perforce Visual Tools](#)⁴³⁰", then you should not have to manually configure the Perforce visual tools integrations. However, if the Collaborator client was installed by an administrator on your computer, or the configuration failed at install time, you can manually configure them as follows:

P4V Installation

Go to the "Tools" menu in P4V and choose "Manage Custom Tools...". In the dialog box click "Import Tools...". In the ensuing open-file dialog, navigate to the Collaborator Client installation directory and select the `P4V-Tools-Import.txt` or `P4V-Tools-Import.xml` file.

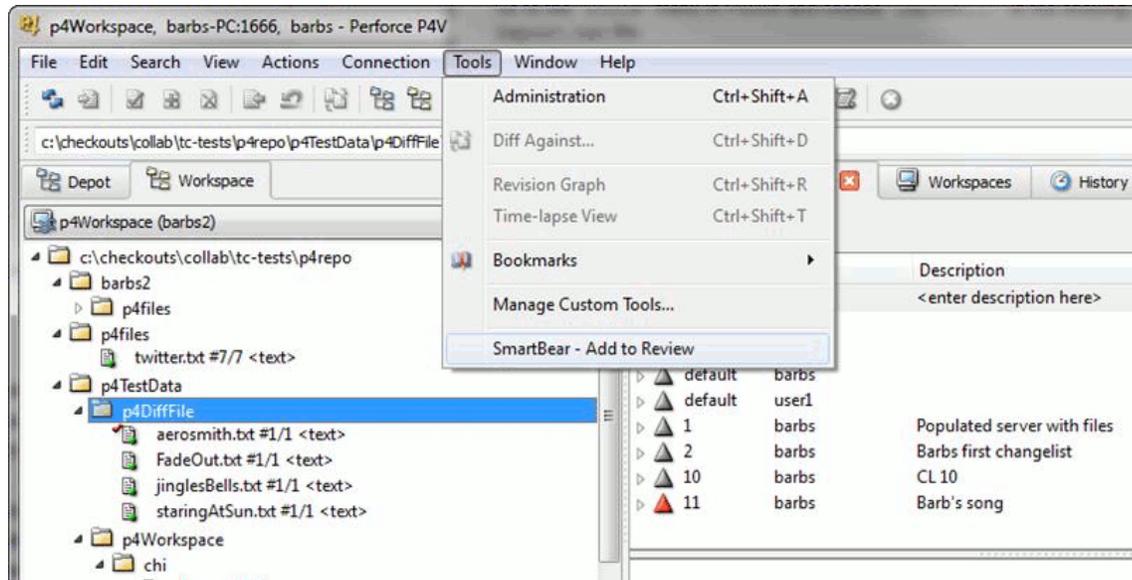
P4Win Installation

Go to the "Tools" menu in P4Win and choose "Import...". In the ensuing open-file dialog, navigate to the Collaborator Client installation directory and select the `P4Win-Tools-Import.txt` file.

There should now be a menu item under "Tools" with the text "SmartBear - Add to Review". It will be dimmed unless a Changelist is selected.

Warning: The plug-ins will work only if the Perforce command-line tool (p4) is in your PATH environment variable.

It is also available in the pop-up menu when you right-click a Changelist:



Working with multiple Perforce workspaces and servers

The P4V/P4Win plug-ins work perfectly and automatically with multiple Perforce servers and servers.

All the Perforce connectivity parameters are taken from the UI, so whatever workspace, server, and authentication you are currently using when you right-click the item will be used automatically by the plug-in.

None of this affects the behavior or configuration of the [command-line client](#)^[446], so you can freely use the plug-ins without disturbing that configuration.

Troubleshooting

If you are experiencing problems with the P4V/P4Win plug-ins, it will help SmartBear technical support if you send in a debugging log. To do this, edit the custom tool configuration (Tools > Manage Custom Tools > Edit), and add a --debug argument to the beginning of the arguments list. This will create a log file at the following location: `~/.smartbear/log/ccollab.log` on Unix platforms and `%USERPROFILE%/.smartbear/log/ccollab.log` on Windows platforms.

Please [contact our technical support](#) and send the log file along with a full description of what you were trying to do when the error occurred.

6.10.5 Perforce Server Triggers

Topics of this section provide information on the Collaborator-specific triggers added to Perforce by Collaborator's Perforce Server Integration package.

Triggers

Follow the links below to learn more about a trigger:

Trigger	Description
ensure-review-started	Ensures that a review has been started (created in Collaborator) for the submitted changelist.
ensure-reviewed	Ensures that a review has been completed for the submitted changelist.
ensure-content-reviewed	Ensures that a review has been completed for the submitted changelist, and that the changelist was not changed after the review was over (that is, that the file contents and the file list are the same).
update-changelist	Appends or updates review-specific information in a changelist's description.

Related Materials

For general information on Perforce triggers, see [Perforce System Administrator's Guide](#).

6.10.5.1 ensure-review-started (for Perforce)

Description

Use the `ensure-review-started` trigger to ensure that a review for the specified changelist has been started. The trigger blocks the submit operation if there is no review for the changelist in Collaborator, and displays an error message telling that the changes need to be reviewed before submitting them to the Perforce repository.

For Perforce this trigger has "change-content" type and is invoked after the changelist creation and file transfer, but before file commit.

Command Line Syntax:

```
ccollab [global-options] admin trigger ensure-review-started [--
ignore-integrate] [--review-id-regex <value>] <changelist-id>
```

Command Options

Option	Required?	Description
<changelist-id>	Yes	The changelist identifier.
--ignore-integrate	No	If specified, Collaborator ignores the merge changes to the source control (that is, the trigger is not fired for these changes. See below).
--review-id-regex <value>	No	A regular expression that identifies the review ID in the commit is comment.

Installation

To install the trigger, add a line like this to your Perforce Triggers list:

```
ccollab content //depot/... "/usr/bin/ccollab --url <collabUrl> --
user <collabUser> --password <collabPasswd> --scm perforce --p4port
<p4port> --p4client %client% --p4user <p4user> --p4passwd <p4passwd>
admin trigger ensure-review-started %changelist%"
```

Some notes:

- Specify your installation directory for `ccollab` and replace *<values>* with appropriate data. Also, type all parameters in a single line even though the text above occupies several lines.
- The Perforce user that you specify must have at least read-only access to the repository.
- On Unix systems, Perforce incorrectly recognizes arguments that include spaces. It ignores quotes and other standard ways of indicating that the data with spaces is actually one argument. The workaround is to use a separate bash script to call our trigger.

Remarks

- The trigger ignores changelists that correspond to new branch creation. Creating a new branch does not involve changes in code, so it does not require a review.
- Perforce treats branch merge changelists like ordinary changelists as they bring changes to source code and can introduce bugs. So, by default, the trigger handles this type of changes. However, since the merge changelists often include a large number of files and since you often need to merge several branches, this approach could require cumbersome reviews to be performed many times.
To avoid possible issues, use the `--ignore-integrate` command-line option. If it is specified, the trigger will ignore changelists that include "merge" changes only. Make sure to review changes in one branch before merging them with other branches.
- For information on Perforce triggers, see [Chapter 6 of the Perforce System Administrator's Guide](#).

6.10.5.2 ensure-reviewed (for Perforce)

Description

Use the `ensure-reviewed` trigger to ensure that the review that was created for the specified changelist has been completed by the time you submit the changelist to the Perforce repository. If the review has not been completed, the trigger blocks the submit operation and displays an error message informing the user about the problem.

For Perforce this trigger has "change-content" type and is invoked after the changelist creation and file transfer, but before file commit.

Command Line Syntax:

```
ccollab [global-options] admin trigger ensure-reviewed [--ignore-integrate] [--review-id-regex <value>] <changelist-id>
```

Command Options

Option	Required?	Description
<changelist-id>	Yes	The changelist identifier.

Option	Required?	Description
<code>--ignore-integrate</code>	No	If specified, Collaborator ignores the merge changes to the source control (that is, the trigger is not fired for these changes. See below).
<code>--review-id-regex <value></code>	No	A regular expression that identifies the review ID in the commit is comment.

Installation

To install the trigger, add a line like this to your Perforce Triggers list:

```
ccollab content //depot/... "/usr/bin/ccollab --url <collabUrl> --
user <collabUser> --password <collabPasswd> --scm perforce --p4port
<p4port> --p4client %client% --p4user <p4user> --p4passwd <p4passwd>
admin trigger ensure-reviewed %changelist%"
```

Some notes:

- Specify your installation directory for `ccollab` and replace `<values>` with appropriate data. Also, type all parameters in a single line even though the text above occupies several lines.
- The Perforce user that you specify must have at least read-only access to the repository.
- On Unix systems, Perforce incorrectly recognizes arguments that include spaces. It ignores quotes and other standard ways of indicating that the data with spaces is actually one argument. The workaround is to use a separate bash script to call our trigger.

Remarks

- The trigger ignores changelists that correspond to new branch creation. Creating a new branch does not involve changes in code, so it does not require a review.
- Perforce treats branch merge changelists like ordinary changelists as they bring changes to source code and can introduce bugs. So, by default, the trigger handles this type of changes. However, since the merge changelists often include a large number of files and since you often need to merge several branches, this approach could require cumbersome reviews to be performed many times.
To avoid possible issues, use the `--ignore-integrate` command-line option. If it is specified, the trigger will ignore changelists that include "merge" changes only. Make sure to review changes in one branch before merging them with other branches.

- For information on Perforce triggers, see [Chapter 6 of the Perforce System Administrator's Guide](#).

6.10.5.3 ensure-content-reviewed

Description

Use the `ensure-content-reviewed` trigger to ensure that the review created for the specified changelist has been completed and that the file list and file contents were not changed by the time you submit the changelist. If the review has not been completed or if the review contains changed files or updated file list, the trigger blocks the submit operation and displays an error message informing the user about the problem.

Command Line Syntax:

```
ccollab [global-options] admin trigger ensure-content-reviewed [--
ignore-integrate] [--no-keywords --review-id-regex <value>]
<changelist-id>
```

Command Options

Option	Required?	Description
<changelist-id>	Yes	The changelist identifier.
<code>--ignore-integrate</code>	No	(Perforce only.) If specified, Collaborator ignores the merge changes to the source control (that is, the trigger is not fired for these changes. See below).
<code>--no-keywords</code>	No	If specified, this option disallows keyword expansion in source files. Expanding the keywords may cause Perforce to consider the files as changed.
<code>--review-id-regex <value></code>	No	A regular expression that identifies the review ID in the commit is comment.

Installation

To install the trigger, add a line like this to your Perforce Triggers list:

```
ccollab content //depot/... "/usr/bin/ccollab --url <collabUrl> --  
user <collabUser> --password <collabPasswd> --scm perforce --p4port  
<p4port> --p4client %client% --p4user <p4user> --p4passwd <p4passwd>  
admin trigger ensure-content-reviewed %changelist%"
```

Some notes:

- Specify your installation directory for `ccollab` and replace `<values>` with appropriate data. Also, type all parameters in a single line even though the text above occupies several lines.
- The Perforce user that you specify must have at least read-only access to the repository.
- On Unix systems, Perforce incorrectly recognizes arguments that include spaces. It ignores quotes and other standard ways of indicating that the data with spaces is actually one argument. The workaround is to use a separate bash script to call our trigger.

Remarks

- The trigger ignores changelists that correspond to new branch creation. Creating a new branch does not involve changes in code, so it does not require a review.
- If your source files use Perforce RCS keywords, we would recommend using the `--no-keywords` command-line option to prevent keyword expansion. Expanded keywords (like `$Date$`, `$Change$` and some others) may cause changes to the source code.
- Perforce treats branch merge changelists like ordinary changelists as they bring changes to source code and can introduce bugs. So, by default, the trigger handles this type of changes. However, since the merge changelists often include a large number of files and since you often need to merge several branches, this approach could require cumbersome reviews to be performed many times.
To avoid possible issues, use the `--ignore-integrate` command-line option. If it is specified, the trigger will ignore changelists that include "merge" changes only. Make sure to review changes in one branch before merging them with other branches.
- If any of Collaborator clients have the `smartbear.ccollab.upload.truncate.size`^[1100] VM-option set up, consider using the `ensure reviewed trigger` instead of this trigger. This VM-option truncates the uploaded files up to the specified size. As a result, the `ensure-diffs-reviewed` and `ensure-content-reviewed` triggers will compare only the remaining parts of the truncated files.
- For information on Perforce triggers, see [Chapter 6 of the Perforce System Administrator's Guide](#).

6.10.5.4 update-changelist

Description

It is convenient to have information like review id and participants' names in the description of a changelist, for which you created a review in Collaborator. Use this trigger to append review-specific information to or update it in the description automatically.

If you use this trigger as a "submit" trigger, it will add or update review-specific values in the description of a pending changelist when you are submitting this changelist to the repository. If you use this trigger as a "form-in change" trigger, then users will see the updated description whenever they edit the changelist.

All review-specific values appear in a single line in the description. You specify the values to be added in the command line (see below).

Command Line Syntax:

```
ccollab [global-options] admin trigger update-changelist [--description-prefix <value>] [--description-template <value>] <changelist-spec>
```

Command Options

Option	Required?	Description
<code>--description-prefix <value></code>	Yes	Specifies the prefix text for the review line in changelist description. The trigger uses this text to find the review line in the description (see the Remarks section below ^[708]).
<code>--description-template <value></code>	Yes	A single-line string that contains an arbitrary text and review-specific data to be posted to the changelist description. To insert review-specific values, use Collaborator variables ^[143] (<code>\${...}</code>). See examples in the Installation section below ^[708] .
<code><changelist-spec></code>	Yes	<code>%changelist%</code> for a trigger of the <i>submit</i> or <i>commit</i> type, or <code>%formfile%</code> for a trigger of the <i>form-in</i> type.

Installation

To install the trigger, add a line like one of those below to your Perforce Triggers list:

- Example 1: Adding the trigger as a submit trigger:

```
ccollabupdatechangelist change-commit //depot/... "/usr/bin/ccollab
--url <collabUrl> --user <collabUser> --password <collabPasswd> --scm
perforce --p4port <p4port> --p4user <p4user> --p4passwd <p4passwd> --
p4client <p4client> admin trigger update-changelist --description-
prefix %quote%Review: %quote% --description-template %quote%ID
${review.id} by ${review.participants.rolename}%quote%%changelist%"
```

- Example 2: Adding the trigger as a form-in trigger:

```
ccollabupdatechangelist form-in change "/usr/bin/ccollab --url
<collabUrl> --user <collabUser> --password <collabPasswd> --scm
perforce --p4port <p4port> --p4user <p4user> --p4passwd <p4passwd>
admin trigger update-changelist --description-prefix %quote%Review: %
quote% --description-template %quote%ID ${review.id} by ${review.
participants.rolename}%quote%%formfile%"
```

Some notes:

- Specify your installation directory for `ccollab` and replace *<values>* with appropriate data. Also, type all parameters in a single line even though the text above occupies several lines.
- The Perforce user that you specify must have read-write access to the changelist.
- On Unix systems, Perforce incorrectly recognizes arguments that include spaces. It ignores quotes and other standard ways of indicating that the data with spaces is actually one argument. The workaround is to use a separate bash script to call our trigger.

Remarks

- The `--description-prefix` option serves as an identifier of the review line in the changelist description. The trigger uses it to find the review-specific string within the description. If the string is found, the trigger updates information in-place. If the string is not found, the trigger appends a new line with review-specific data to the end of the description.

- If there is a review in Collaborator that matches the specified changelist, the changelist description is always updated (either in-place, or appended as it was described above). If there is no review for the specified changelist, the description is updated only if the prefix is already present in the description. If the prefix is not found, the trigger does not append review-specific data to the description.
- If the specified changelist is used in several reviews, then the `${review.id}` variable will refer to the most recent of these reviews.
- For information on variables that you use to insert review-specific data, see [Variable Substitution](#)¹⁴⁹. The examples in the Installation section insert the review identifier and a list of participants, plus the appropriate English words.
- For information on Perforce triggers, see [Chapter 6 of the Perforce System Administrator's Guide](#).

6.11 Subversion Integration

Topics of this section describes Collaborator integration with Subversion.

Overview

- **Server Integration**

The Collaborator server can upload files from committed revisions directly from your Subversion server to a review, without users needing to install any client programs. See [Subversion Server Integration](#)^[712].

Subversion server-side hooks can [ensure code is reviewed](#)^[728] or automatically [create reviews](#)^[728].

- **GUI Client Integration**

Collaborator's GUI Client can upload [local changes to files](#)^[716] in a Working Copy, or upload files in [Revisions](#)^[717]. The GUI Client can also upload [arbitrary Subversion diffs](#)^[718], or the difference between two [Revisions](#)^[719], [branches/tags](#)^[720], or [dates](#)^[721]. See [Integrating Through Collaborator](#)^[715].

- **Command-Line Client Integration**

Collaborator's Command-Line Client can upload local changes to files in a Working Copy, or upload the files in committed Revisions. The Command-Line Client can also upload arbitrary Subversion diffs. See [Integrating Through Command-Line Client](#)^[722].

- **Eclipse Plug-in Integration**

Collaborator's [Eclipse Plug-in](#)^[464] integrates with the Subclipse and Subversive plug-ins, so you can upload [locally modified files](#)^[484] or the files in [Revisions](#)^[501].

Supported Subversion Versions

Collaborator's Command-Line and GUI clients use the Subversion command-line client (`svn`) to communicate with the Subversion server.

Collaborator's Command-Line and GUI clients support Subversion 1.4.x - 1.9.4. For versions 1.3.x and earlier only the [`collab addsvndiffs`](#)^[726] command is supported.

The TortoiseSVN client is not supported, unless it is installed along with the "command line client tools" option.

Since Collaborator clients work through the Subversion command-line client that is already present on your computer, Collaborator supports all protocols, authentications, proxies, and other client configuration options that you are currently using.

Collaborator's Eclipse Plug-in integrates with the [Subclipse](#) and [Subversive](#) Eclipse plug-ins and supports the following versions of these plug-ins:

- Subclipse 1.6.x
- Subclipse 1.4.x

- Subversive 4.x (SVN Connector 6.x)

Support for Directory-Level Changes

Collaborator partially supports Subversion's concept of directories (not just files) being altered.

All the files in directories in question will be scanned, uploaded and represented properly in the Collaborator's GUI. The directories themselves will *not* be shown, or even in the file list confirmation screen presented by the command-line client.

This works correctly even in cases, when you move a parent directory *and* change, add or delete a file in that directory. In the review, you will get the correct content for the file, but the directory itself will not be listed.

Note this limitation affects "commit" functionality. If a directory and a file in it were included in a review and then modified, the Collaborator client will not be able to commit them automatically. The workaround is to commit the changes manually and then "dismiss" the commit Action Item.

Support for svn+ssh

The Collaborator clients support running Subversion over SSH (the `svn+ssh://` protocol). On some systems, especially those under Unix, Mac OS X or Cygwin/Windows, this will probably work correctly out-of-the-box.

If your SSH connection displays a banner, this will interfere with the client being able to parse the Subversion output correctly. We would recommend suppressing banner output by adding the "-q" option to your SSH executable --

```
svn_ssh = ssh -q
```

-- or by creating a local SSH configuration file and adding the following line to it:

```
LogLevel QUIET
```

On some Windows computers, you might have to configure Subversion to default to your SSH client. To do this:

- Go to the `<Documents and Settings>\username\Application Data\Subversion` folder, and open the `config` file for editing.
- In the `[tunnels]` section of this file, find a line that starts with `ssh=`.
- In the line, specify your SSH client. For example:

```
ssh = "C:\\Program Files\\PuTTY\\Plink.exe" -l <your username>
```

Note: It is important to use double slashes.

Support for Symlinks

Collaborator partially supports Subversion's ability to version symlinks. If a committed revision contains a symlink, and you attached this revision to a review, Collaborator will be able to display the symlink contents correctly. However, if a symlink was added to a review before you commit the changes to Subversion, Collaborator displays an incorrect content for the symlink (the symlink will be traversed).

Changes to Properties

Collaborator does not support reviews of the changes made to Subversion properties.

Technical Details and Limitations

Review Screen, Diff Viewer, Eclipse Plug-in and Visual Studio Extension display atomic changelists (revisions in terms of Subversion) in chronological order (from older to newer), regardless the order in which they have been uploaded to review.

Collaborator does not guarantee that Diff Viewer will display correct comparison results for the following cases:

- If you have "gaps" while adding subsequent atomic changelists (revisions in terms of Subversion) to the same review. For example, add changelists 1, 2, and 4, but forget to add changelist 3.
- If you add several diffs (non atomic changelists) to the same review.

6.11.1 Subversion Server Integration

The Collaborator server can be configured to communicate directly with your Subversion server. This allows users to review committed revisions completely from the browser, without having to install any client programs. To enable this feature, first install and configure a Subversion client on the Collaborator server and then create an entry for your Subversion server in the [Version Control](#) ¹⁹⁴ tab of the administration interface. Version control server entries are also created automatically if one of the client programs uploads files from a server that does not match any of the currently configured servers.

Edit Subversion Configuration: Smart Bear SVN

Title:	<input type="text" value="Smart Bear SVN"/>
Attach changelists from browser:	<input type="button" value="Disabled"/> <small>Allow users to attach committed changelists from this server to a review directly from the Web UI, without having to install any client programs.</small>
svn Executable:	<input type="text" value="C:\Program Files\CollabNet Subversion\svn.exe"/> <small>Full path to the `svn` command-line executable</small>
Repository URL:	<input type="text" value="http://svn.smartbear.com/usr/svn/repos"/> <small>Subversion repository URL</small>
Username:	<input type="text"/> <small>Subversion user name</small>
Password:	<input type="password"/> <small>Subversion password</small>
	<input type="button" value="Accept Certificate"/> <small>Accept an untrusted Subversion server certificate</small>
	<input type="button" value="Test Connection"/> <input type="button" value="Save"/> <input type="button" value="Revert"/>

Title	The title is displayed to users, so it should be something that everyone will understand, even if they are going through proxies, VPNs, or other such things. When a version control server entry is created automatically, this is filled in with the URL the client used to connect to the Subversion server.
Attach changelists from browser	If enabled, this feature lets users select committed revisions to review directly from the web browser, without having to install any client programs.
svn Executable	Full path to the 'svn' executable
Repository URL	Subversion repository URL. When a version control server entry is created automatically, this is filled in with the URL the client used to connect to the Subversion server.
Username	Subversion user name
Password	Subversion password

Click the **Test Connection** to make sure Collaborator can contact your Subversion server. If you get an "untrusted certificate authority" error, this is probably because your Subversion server is using a self-signed certificate. You can click **Accept Certificate** to tell Collaborator to permanently accept the certificate.

Client Configuration Mapping

You can supply [Java-style regular expressions](#) to map changelists uploaded from our client tools to this Subversion server. It is important to set up these regular expressions so that files uploaded by the various Collaborator client tools are correctly associated with this server-side Subversion configuration.

Repository URL Pattern:	<input type="text"/>
Repository UUID Pattern:	<input type="text" value="\Q6bbfa079-dbb0-41f0-90ff-c2b04ac707e5\E"/>
<input type="button" value="Save"/> <input type="button" value="Revert"/>	

Repository URL Pattern

Match on the client's configured repository URL . This is not very reliable because clients may have various network configurations that make the URL look different. It is usually far better to use the [Repository UUID Pattern](#).

Repository UUID Pattern

Match on the "Repository UUID" returned from running " `svn info`". This is a unique ID generated by every Subversion repository, and usually works perfectly for identifying uploads to this Subversion server. When a version control server entry is created automatically, this is filled in with the "Repository UUID" obtained from the client.

6.11.2 GUI Client

Subversion-specific Options

The SCM Configuration dialog^[437] has several Subversion-specific options.

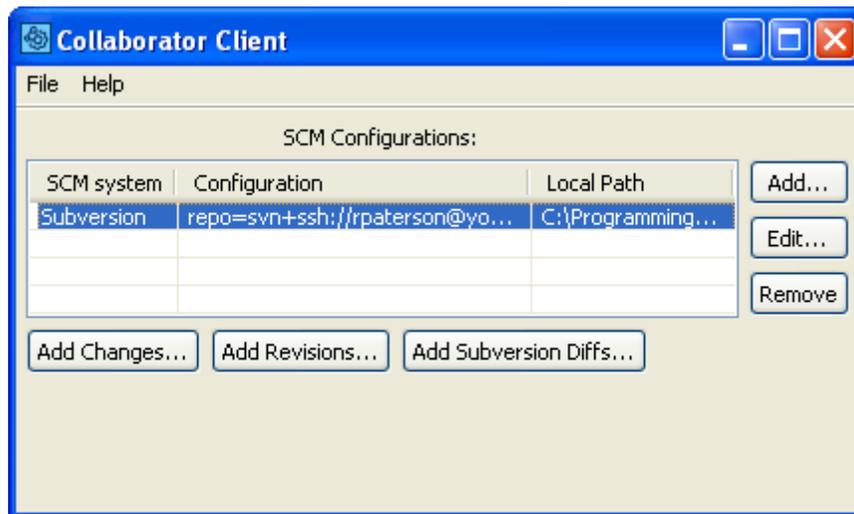
The screenshot shows the 'Add SCM Configuration' dialog box. The title bar reads 'Add SCM Configuration'. The 'Local Source Code Location' is set to 'C:\Work\Programs'. The 'SCM' dropdown is set to 'Subversion'. Under 'SCM Specific Options', the 'svn Executable' field is empty, and the 'Repository URL', 'Username', and 'Password' fields are also empty. There are three checkboxes: 'Require Client Certificate Password' (unchecked), 'Automatically add unversioned files' (unchecked), and 'Recurse in to 'externals' directories' (unchecked). The 'Result Configuration' section shows 'SCM' as 'Subversion' and 'Configuration' as 'Select 'Validate...' below to validate configuration'. At the bottom right are 'Validate...' and 'Cancel' buttons.

Subversion SCM Configuration

Uploading files to a Review

Selecting a Subversion SCM Configuration in the GUI Client [main screen](#)^[436] causes several Add to Review buttons to appear. The *Add Changes...* button will be disabled if you have not specified a working copy in the *Local Path* field of the [SCM Configuration dialog](#)^[715].

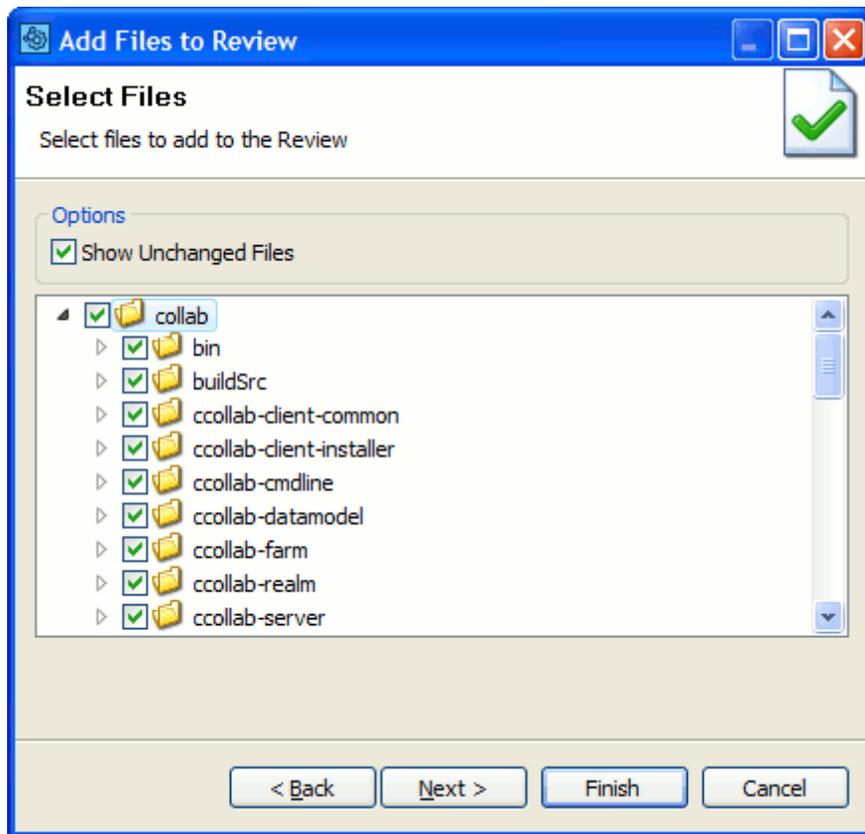
The *Add Changes...*^[716] button uploads modified files from a Working Copy. The *Add Revisions...*^[717] button uploads files in committed Revisions. The *Add Subversion Diffs...*^[718] button uploads arbitrary diffs, or compares the difference between two [Revisions](#)^[719], [branches / tags](#)^[720], or [dates](#)^[721].



Uploading Subversion files to a Review

Add Changes

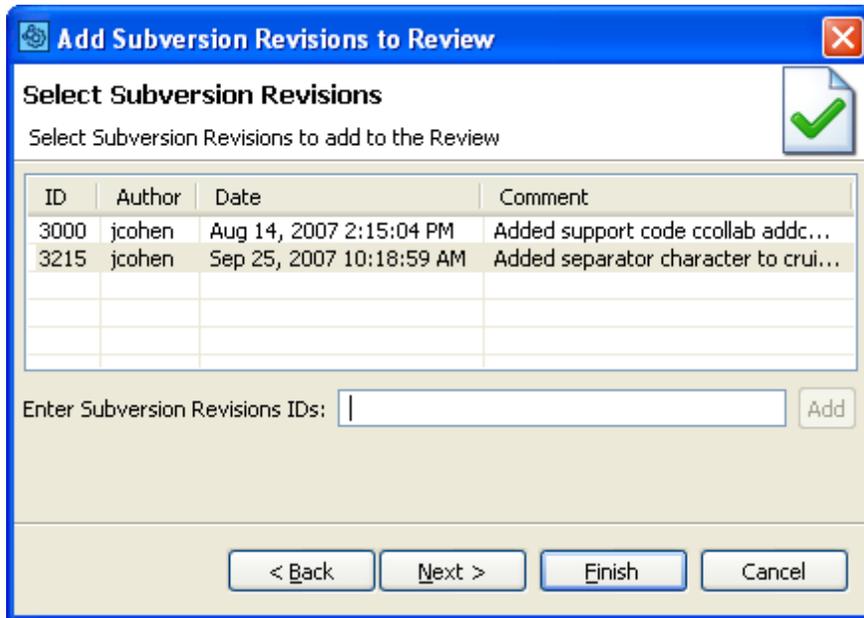
Press the *Add Changes...* button to upload modified files in a Subversion working copy to the Collaborator Server for review. The *Add Changes...* button will be disabled if you have not specified a working copy in the *Local Path* field of the [SCM Configuration dialog](#)^[715].



Add Changes

Add Revisions

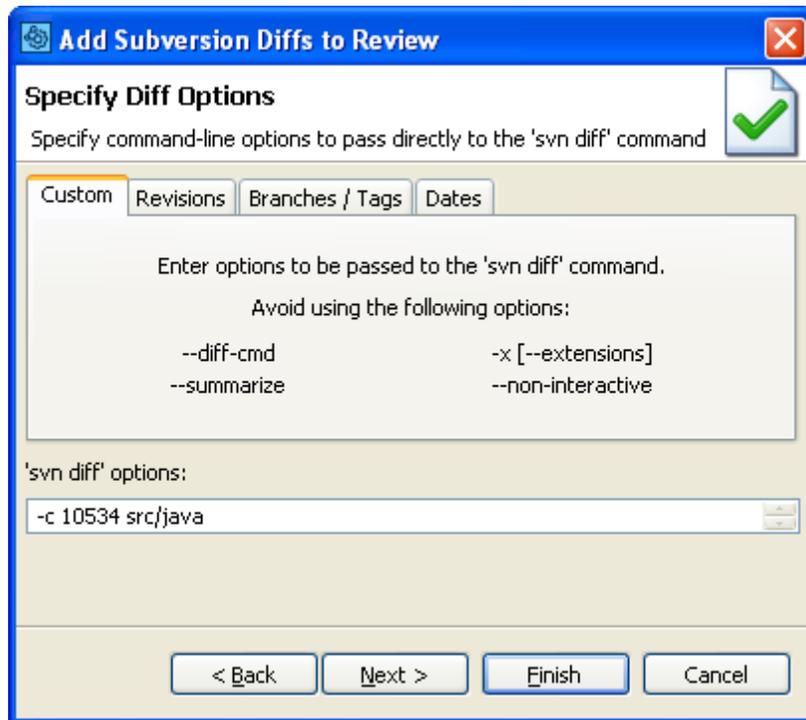
Press the *Add Revisions...* button to upload committed Revisions to the Collaborator Server for review. All of the files modified in the selected Revisions will be uploaded.



Add Subversion Revisions

Add Subversion Diffs

Press the *Add Subversion Diffs...* button to upload arbitrary Subversion diffs to the Collaborator Server for review.

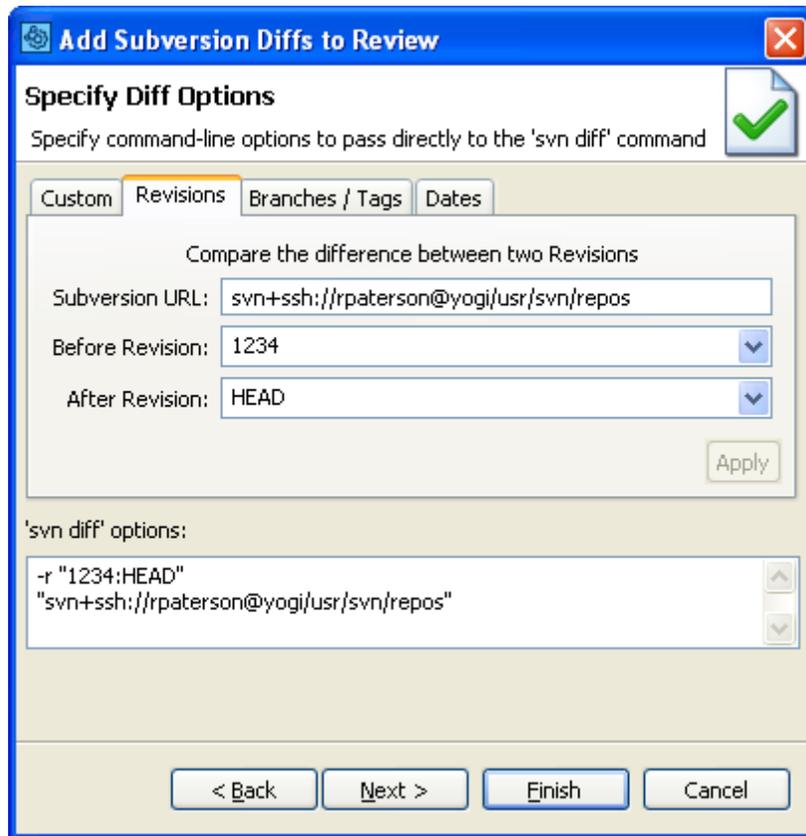


Add Subversion Diffs

You can enter arbitrary Subversion diff options, or compare the difference between two [Revisions](#) ^[718], [branches / tags](#) ^[720], or [dates](#) ^[721].

6.11.2.1 Comparing two Revisions

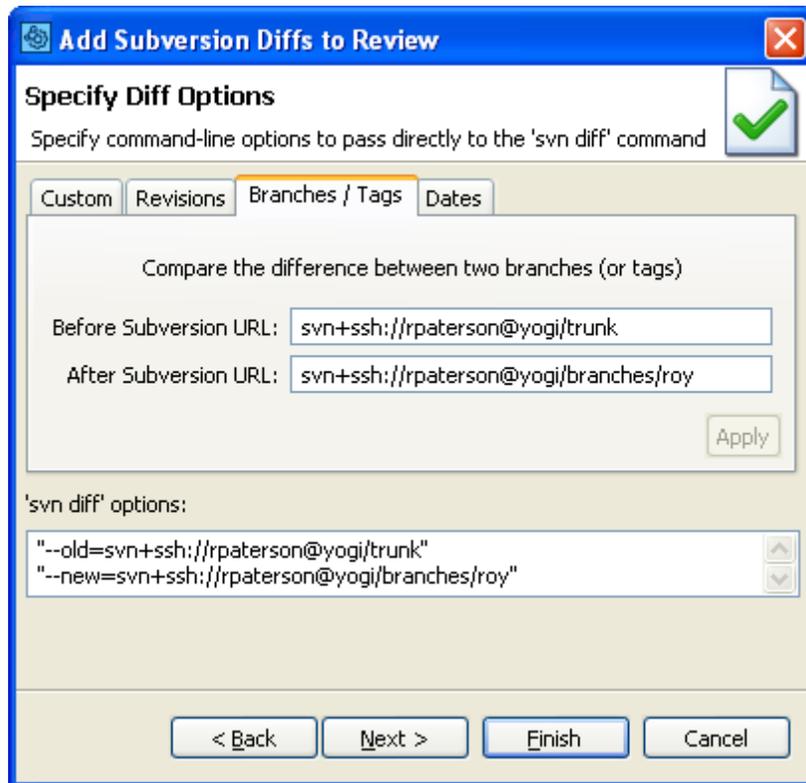
Press the [Add Subversion Diffs...](#) ^[718] button on the [main screen](#) ^[435] and then select the *Revisions* tab to upload the difference between two Revisions.



Upload the difference between two Revisions

6.11.2.2 Comparing two branches / tags

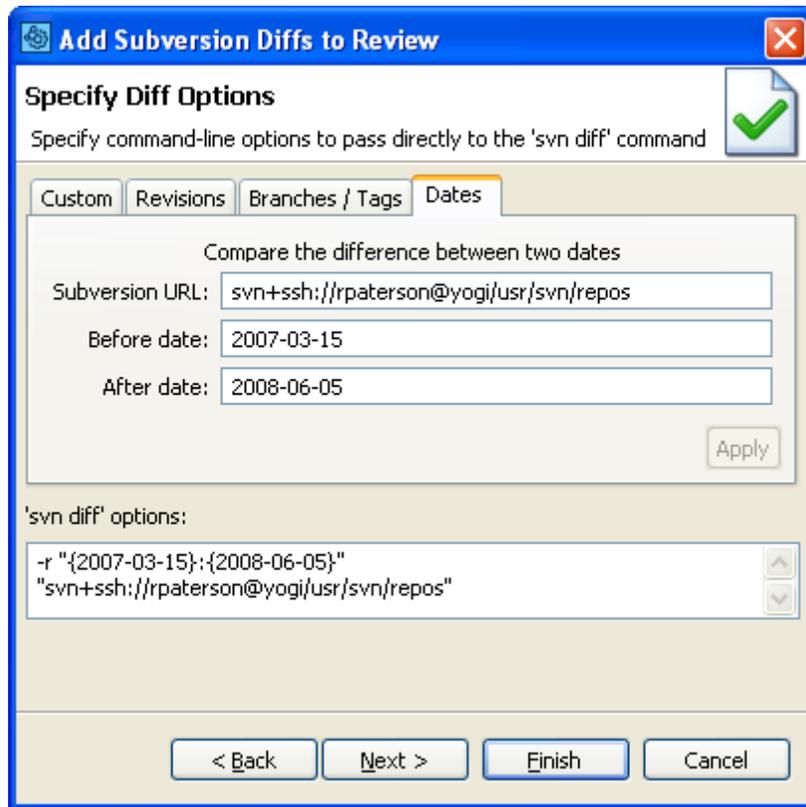
Press the [Add Subversion Diffs...](#)^[718] button on the [main screen](#)^[435] and then select the *Branches* tab to upload the difference between two branches / tags.



Upload the difference between two branches / tags

6.11.2.3 Comparing two dates

Press the [Add Subversion Diffs...](#)^[718] button on the [main screen](#)^[435] and then select the *Dates* tab to upload the difference between two dates.



Upload the difference between two dates

6.11.3 Command-Line Client

Commands recommended for Subversion

[ccollab addchanges](#)⁷²⁴ - Attaches locally-modified files to a review

[ccollab addchangelist](#)⁷²⁵ - Attaches an atomic changelist to a review

[ccollab addsvndiffs](#)⁷²⁶ - Uploads diffs generated from the svn diff command

[ccollab commit](#)⁷²⁷ - Commit changes in the review

The [addchanges](#)⁷²⁴ command will upload local changes to files controlled by Subversion before they are checked into version control.

The [addchangelist](#)⁷²⁵ command will upload committed Subversion revisions. The [changelist](#)⁷²⁶ id is the Subversion Revision number. All the files involved in the Revision are uploaded.

Configuration

In most cases, the Command-Line Client can automatically detect your Subversion configuration. Try [testing your configuration](#) ^[446] to verify the configuration is detected correctly.

If the Command-Line Client is unable to detect your Subversion configuration or you want to override the detected settings, you can manually specify Subversion settings using [global options](#) ^[460].

To manually configure the Command-Line Client to use Subversion, execute the following command:

```
ccollab set scm[456] subversion
```

Subversion-specific Options

Option	Description
<code>--svn-exe <value></code>	Full path to the `svn` command-line executable
<code>--svn-look-exe <value></code>	Full path to the `svnlook` command-line executable (used by Subversion triggers)
<code>--svn-repo-url <value></code>	Subversion repository URL
<code>--svn-user <value></code>	Subversion user name
<code>--svn-passwd <value></code>	Subversion password
<code>--svn-require-client-certificate-password <value></code>	Use this if you have a non-empty and unsaved password for your SSL Client Certificate
<code>--svn-auto-add</code>	Treat unversioned files as if they had been added to Subversion
<code>--svn-recurse-externals</code>	Recurse in the 'svn:externals' directories as if they were part of the same repository
<code>--svn-repo-path <value></code>	Full path to the repository (used by Subversion Triggers)

If you want to review committed Subversion revisions but you do not have a working copy checked out, you must configure your Subversion URL using `svn-repo-url`.

6.11.3.1 addchanges (for Subversion)

Description

The `ccollab addchanges` command locally modified files controlled by Subversion to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchanges [--upload-comment <value>]
<review> <file-spec> [<file-spec> ...]
```

Command Options

Option	Required?	Description
global-options	No	A number of global or Subversion-specific global options. See Command-line Global Options Reference ^[455] .
--upload-comment <value>	No	A comment to be used for the uploaded files. Default is <i>Local changes</i> .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.
<file-spec> [<file-spec> ...]	Yes	Files to be added and/or folders to scan for modified files. Separate multiple file and folder names with spaces. If a file or folder name contains spaces, enclose this name in quotes. <code>ccollab</code> scans folders recursively. The resulting list includes the name of modified files. "Modifications" include include edits, additions, deletions, branches, integrations, moves, copies, and so on.

Option	Required?	Description
		After the scan is complete, a file list is presented in a graphical editor so you can review the files to be uploaded and make correct the list, if needed.

Examples:

To create a new review and add all changes in the current directory and below, plus the file foo.txt, you would use:

```
ccollab addchanges new . foo.txt
```

To upload modified files from the current working directory and all subdirectories to review 123:

```
ccollab addchanges 123 .
```

To upload file foo.txt and modified files from c:\dev\project into a brand new review:

```
ccollab addchanges new foo.txt c:\dev\project
```

6.11.3.2 addchangelist (for Subversion)

Description

The `ccollab addchangelist` command attaches all files from a submitted Subversion changelist (revision) to a review on the Collaborator server.

Command Line Syntax:

```
ccollab [global-options] addchangelist <review> <changelist>
[<changelist> ...]
```

Command Options

Option	Required?	Description
[global-options]	No	A number of global or PTC-specific global options. See Command-line Global Options Reference ⁴⁵⁵ .
<review>	Yes	Identifier of the desired review (an integer number), or a <i>new</i> , <i>ask</i> , or <i>last</i> string.

Option	Required?	Description
<code><changelist></code> <code>[<changelist> ...</code> <code>]</code>	Yes	Identifier(s) of the desired changeset(s) in your source control.

Examples:

To upload revisions r4321 and r7568 to a new review:

```
ccollab addchangelist new 4321 7568
```

To upload revisions r5432 and r12654 to review 111:

```
ccollab addchangelist 111 5432 12654
```

6.11.3.3 addsvndiffs

Description

The `ccollab addsvndiffs` command uploads differences between arbitrary versions of files in Subversion. The differences are generated using the native `'svn diff'` command of Subversion.

Command Line Syntax:

```
ccollab [global-options] addsvndiffs [--upload-comment <value>]  
<review> [<user-diff-arg> [<user-diff-arg> ...]]
```

Command Options

Option	Required?	Description
<code>--upload-comment <value></code>	No	Comment used to upload files (defaults to command-line arguments)
<code><review></code>	Yes	Must be either an integer review-id, 'new', 'ask', or 'last'
<code><user-diff-arg> [<code><user-diff-arg> ...</code>]</code>	No	Command-line arguments to pass directly to the diff command

Remarks:

Do not use diff arguments that affect the diff output such as '`--diff-cmd`', '`-x [--extensions]`', '`--summarize`', or '`--non-interactive`'. The Collaborator command-line client will automatically select an output format that ensures you will get all the data you need on the server.

Examples:

```
ccollab addsvndiffs 698 -r 2:16
ccollab addsvndiffs new -r PREV http://my.svn.server/svn/repo
ccollab addsvndiffs 698 -c 10534 src/java
ccollab addsvndiffs new OLDURL[@OLDREV] NEWURL[@NEWREV]
```

6.11.3.4 commit (for Subversion)

Description

The `ccollab commit` command submits the changes from a pre-commit review to source control. Be sure to include a relevant comment.

Command Line Syntax:

```
ccollab [global-options] commit [--comment <value>] [--dismiss-only]
[--force] <review>
```

Command Options

Option	Required?	Description
<code>--comment <value></code>	No	Comment for reviewed changes
<code>--dismiss-only</code>	No	Just dismiss the Action Item
<code>--force</code>	No	Ignore potential problems
<code><review></code>	Yes	Must be either an integer review-id, 'ask', or 'last'

Example:

```
ccollab commit 25 --comment "my code" --force
```

6.11.4 Subversion Server Hooks

Triggers recommended for Subversion

`ccollab admin trigger ensure-review-started`^[729] - Changelist cannot be submitted until review of this changelist exists

`ccollab admin trigger ensure-reviewed`^[731] - Changelist cannot be submitted until review of this changelist has been completed

`ccollab admin trigger create-review`^[733] - Creates a new Review for a changelist if no Review already exists

The `ensure-review-started`^[729] and `ensure-reviewed`^[731] hooks ensure that files cannot be committed unless certain conditions are met. If a user attempts to commit files that do not meet those conditions, an error message describing the unfulfilled conditions will be displayed and the files will not be committed. If the conditions are met, the commit will be allowed to continue normally. The `ensure-review-started` hook requires that the review exist; `ensure-reviewed` requires that the review be completed.

The `create-review`^[733] hook automatically creates a review in Collaborator after the revision is committed to the Subversion server. Because you can supply the regular expression for identifying reviews, you can provide users with the ability to review before check-in without having an additional review automatically created after the check-in. This way some groups (or just some check-ins arbitrarily) can use pre-commit review and others post-commit, and either way you know all code has been reviewed or at least that a review of all code exists in the system.

Linking reviews with commits

To use the `ensure-review-started`^[729] and `ensure-reviewed`^[731] hooks, you must first require developers to put the review ID somewhere in the Subversion commit message (also optionally for the `create-review`^[733] hook). The format of this text is completely up to you; you will need to supply a [Java-style regular expression](#) that identifies this text and specifically calls out the review ID inside that text. The regular expression is specified using the `--review-id-regex` hook command option.

Here are some common ways of specifying the review ID and the corresponding regular expressions. Note that regular expressions are *case-insensitive* and you must *identify the review ID portion with parenthesis*:

Text	--review-id-regex
Review: 4233	review:\s*(\d+)
rID4233	rid(\d+)
(review 4233)	\(review (\d+)\)

This text can appear in-line with other text or in a more formal "form-style" layout. Because you control the regular expression, you can control exactly what this looks like.

For more information about Subversion hooks in general, see the [Subversion documentation](#).

6.11.4.1 ensure-review-started (for Subversion)

Description

Use the `ensure-review-started` trigger to ensure that a review for the specified changelist has been started. The trigger blocks the submit operation if there is no review for the changelist in Collaborator, and displays an error message telling that the changes need to be reviewed before submitting them to the Subversion repository.

Command Line Syntax:

```
ccollab [global-options] admin trigger ensure-review-started [--  
review-id-regex <value>] <changelist-id>
```

Command Options

Option	Required?	Description
<changelist-id>	Yes	The changelist identifier.
--review-id-regex <value>	No	A regular expression that identifies the review ID in the commit is comment.

Installation

To install this trigger you will need to create a pre-commit hook. If you already have a pre-commit hook, you can add our tool wherever it is appropriate; otherwise you will need to create an executable hook as described in the Subversion documentation (typically a batch file under Windows or a shell script under Linux/Mac).

Example Windows batch file:

```
"C:\Program Files\Collaborator Client\ccollab.exe" --url <collabUrl>  
--user <collabUser> --password <collabPasswd> --scm subversion --svn-  
user <svnUser> --svn-passwd <svnPasswd> --svn-repo-path %1 --svn-  
look-exe "C:\Program Files\Subversion\bin\svnlook.exe" admin trigger  
ensure-review-started --review-id-regex "review:\s+(\d+)" %2 || exit  
1
```

Example Linux/OSX shell script:

```
/collab/install/ccollab --url <collabUrl> --user <collabUser> --  
password <collabPasswd> --scm subversion --svn-user <svnUser> --svn-  
passwd <svnPasswd> --svn-repo-path $1 --svn-look-exe /usr/bin/svnlook  
admin trigger ensure-review-started --review-id-regex "review:\s+(\d  
+)" $2 || exit 1
```

Note our use of "exit 1" to ensure that the script terminates with a non-zero exit code if our trigger application fails.

Remarks

- You must specify the `--svn-repo-path` and `--svn-look-exe` global options.
- You need to specify the `--svn-user` and `--svn-passwd` global options. At that, in order for this hook to work smoothly you will need your Subversion usernames and Collaborator logins to match (differs at most in capitalization).
- If you have an empty password for Collaborator account (which is not recommended), you should pass an empty string as the password global option: `--password ""`
- You must require developers to put the review ID somewhere in the Subversion commit message. The format of this text is completely up to you; you must supply a [Java-style regular expression](#) that identifies this text and specifically calls out the review ID inside that text using the `--review-id-regex` command option.

6.11.4.2 ensure-reviewed (for Subversion)

Description

Use the `ensure-reviewed` trigger to ensure that the review that was created for the specified changelist has been completed by the time you submit the changelist to the Subversion repository. If the review has not been completed, the trigger blocks the submit operation and displays an error message informing the user about the problem.

Command Line Syntax:

```
ccollab [global-options] admin trigger ensure-reviewed [--review-id-regex <value>] <changelist-id>
```

Command Options

Option	Required?	Description
<code><changelist-id></code>	Yes	The changelist identifier.
<code>--review-id-regex <value></code>	No	A regular expression that identifies the review ID in the commit is comment.

Installation

To install this trigger you will need to create a pre-commit hook. If you already have a pre-commit hook, you can add our tool wherever it is appropriate; otherwise you will need to create an executable hook as described in the Subversion documentation (typically a batch file under Windows or a shell script under Linux/Mac).

Example Windows batch file:

```
"C:\Program Files\Collaborator Client\ccollab.exe" --url <collabUrl>
--user <collabUser> --password <collabPasswd> --scm subversion --svn-
user <svnUser> --svn-passwd <svnPasswd> --svn-repo-path %1 --svn-
look-exe "C:\Program Files\Subversion\bin\svnlook.exe" admin trigger
ensure-reviewed --review-id-regex "review:\s+(\d+)" %2 || exit 1
```

Example Linux/OSX shell script:

```
/collab/install/ccollab --url <collabUrl> --user <collabUser> --
password <collabPasswd> --scm subversion --svn-user <svnUser> --svn-
passwd <svnPasswd> --svn-repo-path $1 --svn-look-exe /usr/bin/svnlook
admin trigger ensure-reviewed --review-id-regex "review:\s+(\d+)" $2
|| exit 1
```

Note our use of "exit 1" to ensure that the script terminates with a non-zero exit code if our trigger application fails.

Remarks:

- You must specify the --svn-repo-path and --svn-look-exe global options.
- You need to specify the --svn-user and --svn-passwd global options. At that, in order for this hook to work smoothly you will need your Subversion usernames and Collaborator logins to match (differs at most in capitalization).
- If you have an empty password for Collaborator account (which is not recommended), you should pass an empty string as the password global option: --password ""
- You must require developers to put the review ID somewhere in the Subversion commit message. The format of this text is completely up to you; you must supply a [Java-style regular expression](#) that identifies this text and specifically calls out the review ID inside that text using the --review-id-regex command option.

6.11.4.3 create-review

Description

The `admin trigger create-review` trigger automatically creates a review in Collaborator after the change is committed to the Subversion server. It is smart enough to not create reviews if they have already been created for this code.

Command Line Syntax:

```
ccollab [global-options] admin trigger create-review [--add-on-match
<value>] [--review-id-regex <value>] <changelist>
```

Command Options

Option	Required?	Description
<code>--add-on-match <value></code>	No	If a review ID regex matches, add this changelist to the review
<code>--review-id-regex <value></code>	No	Regular Expression that identifies Review ID in commit comment
<code><changelist></code>	Yes	SCM-specific ID of an atomic set of changes

Installation

For Subversion, to install this trigger you will need to create a post-commit hook. If you already have a post-commit hook, you can add our tool wherever it is appropriate; otherwise you will need to create an executable hook as described in the Subversion documentation (typically a batch file under Windows or a shell script under Linux/Mac).

Example Windows batch file:

```
"C:\Program Files\Collaborator Client\ccollab.exe" --url <collabUrl>
--user <collabUser> --password <collabPasswd> --scm subversion --svn-
user <svnUser> --svn-passwd <svnPasswd> --svn-repo-url svn://url/to/
repo --svn-exe "C:\Program Files\Subversion\bin\svn.exe" admin
trigger create-review --review-id-regex "review:\s+(\d+)" %2 || exit
1
```

Example Linux/OSX shell script:

```
/collab/install/ccollab --url <collabUrl> --user <collabUser> --
password <collabPasswd> --scm subversion --svn-user <svnUser> --svn-
passwd <svnPasswd> --svn-repo-url svn://url/to/repo --svn-exe /usr/
bin/svn admin trigger create-review --review-id-regex "review:\s+(\d
+)" $2 || exit 1
```

Note our use of "exit 1" to ensure that the script terminates with a non-zero exit code if our trigger application fails.

Remarks:

- You need to specify the `--svn-user` and `--svn-passwd` global options. At that, in order for this hook to work smoothly you will need your Subversion usernames and Collaborator logins to match (differs at most in capitalization). This ensures that when a developer checks in code the review is created under his Collaborator account. If you do not do this the hook will still work, but reviews will be created under the system administrator's account. Someone will have to log into the system with that account and assign the review to someone else.
- If you have an empty password for Collaborator account (which is not recommended), you should pass an empty string as the password global option: `--password ""`
- You may optionally specify a regular expression that identifies a Collaborator review ID inside a Subversion commit message. If you supply the regular expression, the create-review hook will check for this text in commit messages and automatically not create a new review if a non-canceled review with that ID already exists. This allows some users to do pre-commit review and others post-commit, and either way you know all code has been reviewed or at least that a review of all code exists in the system.

6.11.5 Subversion-Specific Tips

- Error messages about "inconsistent line ending style" indicate that the file(s) being operated on have mixed line endings (typically Unix and DOS-style) and that one or more of them has the subversion property `svn:eol-style` set to `native`. This is a fatal error as subversion stops processing when the condition is found. The fix is to either force the line endings to a consistent state (that is, typically either all unix or all DOS-style) or propdel the `svn` property if there is a need for mixed line endings. A variety of methods are available to automate conversion of line ending styles; the free utility `unix2dos/dos2unix` exists for many platforms for example.

7 Repository Hosting Service Integrations

Collaborator provides support for most popular repository hosting services: GitHub, Bitbucket, GitLab. This gives you the possibility to review the changes pushed to web-based repository or pull/merge requests in that repository. The integrations save the time and efforts needed to synchronize commits in web-based repositories and Collaborator reviews.

In This Section

- [Repository Hosting Service Integrations: Overview](#)^[735]
Provides general information on how Collaborator integrates with repository hosting services.
- [Configure Repository Hosting Service Integrations](#)^[748]
Describes how to setup integrations with remote repository hosting services supported by Collaborator.

Related Topics of Interest

- [Version Control Integrations](#)^[540]
Describes integrations with version control systems.

7.1 Repository Hosting Service Integrations: Overview

This topic provides an overview of integrations with repository hosting services.

[Supported Repository Hosting Services](#)^[736]

[Requirements](#)^[736]

[How Web-Repository Integration Works](#)^[736]

[Technical Details](#)^[745]

[System Specifics](#)^[745]

Supported Repository Hosting Services

- GitHub
- GitHub Enterprise
- Bitbucket (both Git and Mercurial repositories)
- Bitbucket Server (both Git and Mercurial repositories)
- GitLab
- GitLab Community Edition
- GitLab Enterprise Edition

Requirements

1. **Setup, configure and enable integration** - Your Collaborator administrator should create a new Remote System Integration configuration. The configuration defines what repository hosting services to use, what repository and what branches to monitor, repository access credentials so on. Each single configuration instance tracks changes in a single web-based repository. To track multiple repositories, your administrators should create a separate configuration for each repository. For detailed instructions on how to setup each integration, see [Configuring Repository Hosting Service Integrations](#)^[748].
2. **Create webhook** - Webhooks notify Collaborator about the activity of the remote repository. Collaborator tries to create webhooks automatically. Your administrators would need to make your Collaborator server be accessible through Internet (configure a firewall, enable tunneled connections and so on).
3. **Setup user mapping** - In order to assign reviews to the appropriate person, we need to link the owner of web-based repository with some of Collaborator user accounts. If Collaborator fails to match the web-based repository owner with any of Collaborator users, it will make the Collaborator Administrator the creator and author of the new review. See [Link User Accounts](#)^[776] for detailed instructions on how to setup user mapping.

How Web-Repository Integration Works

When a review is created

Once configured Collaborator tracks changes at target web repository and automatically creates reviews in the following cases:

- when a pull request (or a merge request, depending on service terminology) is made within one or several specified branches of the repository,

- when a direct push to one or several specified branches of the repository is performed. The latter can be suppressed by the "Ignore pushes for branches" configuration setting.

Additionally Collaborator reviews are registered as repository's continuous integration tests (**status checks** in terms of GitHub, **builds** in terms of Bitbucket and Bitbucket Server and **pipelines** in terms of GitLab). Thus the current status of corresponding review will be displayed in the pull request. Moreover, for protected branches, Collaborator reviews must be accomplished in order to apply the changes.

[Click to see examples](#)

Update HelloWorldApp.java #4

 Open JohnSmithSB wants to merge 2 commits into `master` from `JohnSmithSB-patch-1`

Conversation 0 Commits 1 Files changed 1

 JohnSmithSB commented 2 minutes ago Owner + 😊 ✎

Function refactoring

 Update HelloWorldApp.java 5cce17d

 JohnSmithSB commented 2 minutes ago Owner + 😊 ✎ ✕

Collaborator: Review for this pull request was created. [Link to review](#)

 Merge branch 'master' into JohnSmithSB-patch-1 cca6ea4

Add more commits by pushing to the `JohnSmithSB-patch-1` branch on `JohnSmithSB/HelloWorldApp`.

 **Some checks haven't completed yet** Hide all checks
1 expected and 1 pending checks

-  Collaborator — Review still in progress Details

Required statuses must pass before merging Update branch
All required [status checks](#) on this pull request must run successfully to enable automatic merging.

As an administrator, you may still merge this pull request.

Merge pull request ▼ You can also [open this in GitHub Desktop](#) or view [command line instructions](#).

An example of pull request in a GitHub repository

Bitbucket Teams Projects Repositories Snippets Find a repository... Q

John Smith / TestRepoForCollaborator / Pull requests

Pull requests

#9 OPEN Branch1 → master Merge Edit Decline Approve

Pull from Branch1

Overview Commits Activity

What do you want to say?

Build Collaborator for commit 88f9960 Review still in progress 6 m

John Smith AUTHOR Collaborator: a review for this pull request was created. <http://collabserver.com/ui#review:id=10>
Reply • Edit • Delete • Create task • 6 minutes ago

John Smith OPENED this pull request a minute ago

	John Smith	88f9960	HelloWorldApp.java edited online with Bitbucket	9 minutes ago
	John Smith	9c783cd	HelloWorldApp.java created online with Bitbucket	12 minutes ago

An example of pull request in a Bitbucket repository

The screenshot shows a Bitbucket pull request interface. At the top, the Bitbucket logo and navigation tabs for 'Projects' and 'Repositories' are visible. A search bar contains the text 'Search for code or repositories...'. The main header shows the user 'John Smith' and the repository path 'jsmith/HelloWorldAppjava-1486999880942' with a 'master' branch indicator and an 'OPEN' button. A 'Merge' button is also present. The title of the pull request is 'HelloWorldApp.java edited online with Bitbucket'. Below the title are tabs for 'Overview', 'Diff', and 'Commits'. The 'Details' section shows '1 build in progress' and a 'Learn more' link. The 'Activity' section shows a comment from John Smith: 'Collaborator: a review for this pull request was created. http://collabserver.com/ui#review:id=11'. At the bottom, a status update shows 'John Smith OPENED the pull request 5 mins ago'.

An example of pull request in a Bitbucket Server repository

The screenshot displays a GitLab Merge Request page for a repository named 'my-awesome-project' by John Smith. The page title is 'Update README.md', which was edited about 5 hours ago. The merge request is to merge the 'feature1' branch into the 'master' branch. A pipeline (#6268679) is shown as passed for commit 7a2ce735. Action buttons include 'Accept Merge Request', 'Remove source branch', 'Squash commits', and 'Modify commit message'. Below the merge request, there is a discussion section with two comments from John Smith (@JohnSmithSB) on the 'Master' branch. The first comment, from a week ago, states that a review for this merge request was created in Collaborator. The second comment, from about 5 hours ago, states that the corresponding review in Collaborator has been completed, with the author being John Smith and the reviewer being Clive Sinclair.

An example of merge request in a GitLab repository

Whom the review is assigned to

When Collaborator gets a notification about changes in a repository, it also gets information about the source-control user, who made these changes. So, it attempts to find a corresponding user in Collaborator to assign the new review to that user. In order for the search to be successful, you and your teammates need to link their Collaborator and source-control accounts in Collaborator settings. See [Link User Accounts](#)^[776] for details.

If Collaborator finds a Collaborator user that matches the source-control user, it assigns that Collaborator user as a review author and creator. If Collaborator does not find a matching user, it assigns the Collaborator administrator as a review author and creator.

Additionally, Collaborator can assign reviewers in the following cases:

- GitHub, GitLab: If repository contains a CODEOWNERS file that defines users responsible for certain files in a repository and integration can match those GitHub/GitLab users with Collaborator users,
- Bitbucket, Bitbucket Server: If some specific users were added as reviewers when creating pull request on the Bitbucket side and integration can match those Bitbucket users with Collaborator users.

What the review will contain

The review will contain the changes made to the remote repository. Namely, the review's [Remote System Links](#)^[323] section will list links to pull requests or push commits, as well as their current statuses, the [Chat](#)^[326] section would display a link to the remote repository and the [Review Materials](#)^[327] section will hold the files that were modified on the web repository.

▼ Review #13176: Github pull request #823. COLLAB-3956 CLI admin group group-author-subscription create command ...

CURRENT STATE: FINISHED UNLESS FILE ACTIVITY OCCURS **COMPLETED** 4 Participants 14 Files 1 Chats 0 Defects EDIT

Review Title: Github pull request #823. [COLLAB-3956](#) CLI admin group group-author-subscription create command ...

Role: Reviewer

Created: on 2018-04-11 at 18:52 by Clive Sinclair

Template: Default

Completed On: 2018-04-13 12:23

Restrict Access: Participants or Group Based

Restrict Uploads/Deletions: Yes
...has strange param

Overview
Changed cmd commands for author subscriptions. It helps to have more similar working with user subscriptions and group subscriptions. Did some refactoring.

► Participants Active(2) Approved(2)

▼ Remote System Links

Add Remote System Link: Reference: Remote System: -- Select -- ADD DONE EDITING

Link Remote Systems:
Enter Reference and click Add.

Remote System	Linked Item	Status	Action
SmartBear/collab-core (main repository)	PR#823: COLLAB-3956 CLI admin group group-author-subscription create command ...	CLOSED	↻
SmartBear JIRA	COLLAB-3956: CLI: admin group group-author-subscription create command has strange param	READY FOR RELEASE	↻

► Defect Log

▼ Chat

Clive Sinclair on 2018-04-11 at 18:52
Link to Github pull request: <https://github.com/SmartBear/collab-core/pull/823>

An example of review created on changes in GitHub repository

When further commits are made

- **If a review was created for a pull request**

If your teammates make more changes to the branch after a review was created, and if the pull request is not closed, Collaborator uploads new file versions to the created review. This works until the pull request is closed. If the review remains open after the pull request is closed, then Collaborator will not upload files from subsequent commits to the review.

- **If a review was created for a commit (push event)**

Collaborator will not upload new file versions to the review automatically.

When files conflict

Once a file conflict could be resolved automatically, the merge commit will not be added to the review. If a file conflict was resolved manually (that is, if some files have been changed to complete the merge), then Web-repository integration will update the review with the changes from the resolving commit.

Note: Changes from merge commits will not be displayed in the Diff Viewer only when the [Default Revision Comparison of Diff Viewer](#)^[298] setting is set to 'Current Branch Changes Only'. You can find this setting under [User Preferences](#)^[297] in Display tab.

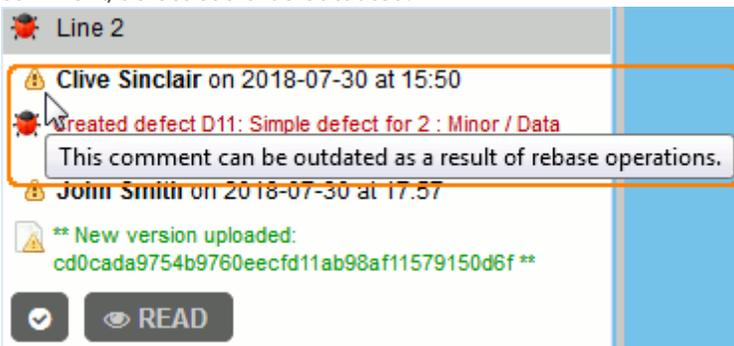
When merge commit was added

File changes made by merge commits will only be displayed in Separate view of the Review Materials section of the review. They will not be displayed in Overlay view. Besides, file changes made by merge commits are not taken into account when calculating overall LOC metrics and they do not affect the overall rework count of a file.

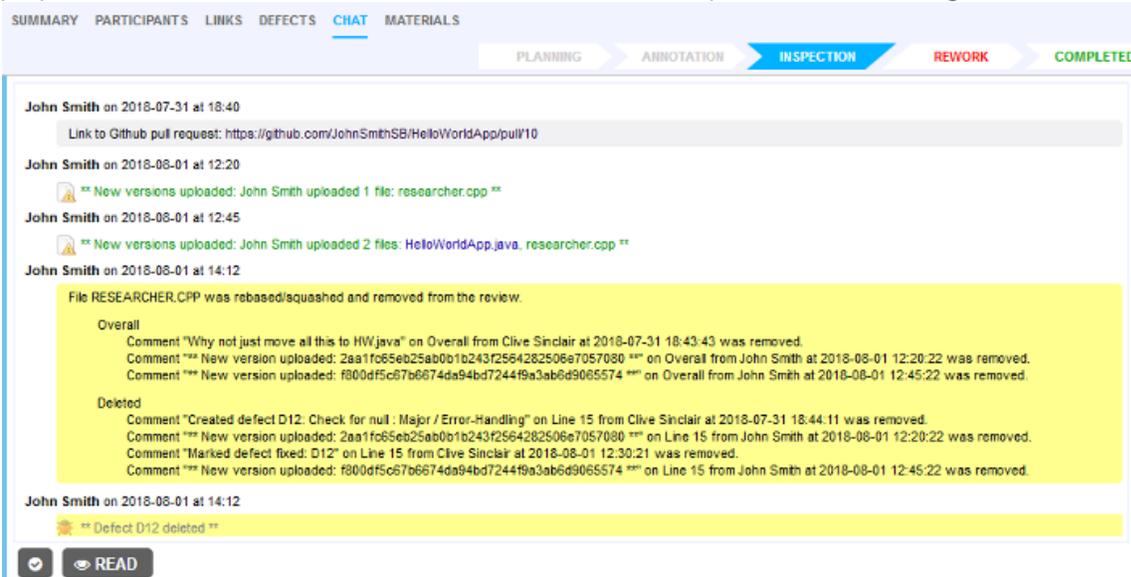
When commit history is modified (rebasing or squashing commits)

Collaborator will process the outdated commits and will reorder the list of file revisions to keep it up-to-date.

- If some file revisions have been removed, the comments or defects addressing that file revision will be promoted to resulting revision and will display a special icon  indicating that the comment/defect could be outdated.



- If some files have been removed, they will also be removed from the review materials. For audit purposes, comments and defects for removed files will be copied to the review's general chat.



When a review is completed

The integration may automatically merge or close the appropriate pull/merge request. This behaviour is controlled by the "When Review Completed" setting.

When a review is completed and pull request is updated

If review was completed and further commits are made in a branch which initiated a pull/merge request - depends on the "Allow to reopen review" setting of the remote system configuration. By default this setting is true, and review will be reopened.

When a review is cancelled, deleted or rejected

The integration may automatically close pull/merge request. Additionally it may automatically delete the corresponding feature branch upon closing or merging a pull request. This behaviour is controlled by the "When Review Cancelled/Deleted/Rejected" setting.

When a pull/merge request is closed

When a pull/merge request was closed by the remote repository, the integration posts a comment in the respective review.

When pull request is reopened

If review was completed and pull request being reopened - review will be reopened.

If review was cancelled/deleted/rejected and pull request being reopened - new review will be created.

When repository contains submodules

Repository hosting integrations can display changes in the submodules of tracked repositories. (Other [Collaborator clients](#)⁵⁶³ cannot do that and ignore submodule changes.)

Submodules must belong to the same owner/project/organization.

Commits that add a new submodule, or remove an existing submodule will be represented as changes in the `.gitmodules` file. Other changes in submodule files will be ignored in this commit.

Once submodule is added, further changes in submodule files will be displayed as file changes in submodule folder.

Technical Details

- Integration creates reviews on any pull/merge requests - no matter whether it came from the same repository or from the forked repository.
- By default, webhooks created by the Easy Add Repository wizard do not check the if the server's SSL certificate is valid. This is done intentionally, in order to avoid handshake issues on Collaborator servers with self-signed or untrusted certificate authority (CA) root certificates. To enable SSL verification on existing webhooks, modify them on the remote repository server. To enable SSL verification for all new webhooks created by the Easy Add Repository wizard, use the `-Dcom.smartbear.collab.datamodel.remotesystem.webhooks.ssl.enable=true` [Java VM Option](#)¹⁰⁹³.
- In order to decrease number of calls to repository hosting servers, Collaborator caches some of the most often retrieved entities from APIs (commits, pull request diffs, commit diffs). By default cache contains up to 20000 entities for each active remote system integration. To change the default cache size or disable caching, use the server's `-Dcom.smartbear.collab.datamodel.remotesystem.cache.size` [Java VM Option](#)¹⁰⁹³. Usage statistics of cache and all outgoing API calls from Collaborator could be found in the [remoteSystemApi.log](#)¹⁵⁸ when the debug logging level is enabled (log4j.logger.rsApiLog = warn, RemoteSystemAPI) through the `log4j.properties` file.
- Currently, Collaborator incorrectly displays non-latin characters in pull request names, branch names, pull request descriptions.

System Specifics

GitHub

- If repository contains a [CODEOWNERS file](#) that defines users responsible for certain files in a repository and integration can match those GitHub users with Collaborator users, then it will automatically add those users as reviewers on Collaborator's side.

- It is possible to additionally secure webhook calls by providing a Secret token while creating/modifying a webhook on GitHub server and a [GitHub configuration](#)^[748] on the Collaborator side. This token will be used as server signature for verifying webhook events. The Secret token parameter is optional and is not specified by default.
- Just after a new GitHub configuration has been created, the very first push to a repository will not be tracked. Subsequent pushes will be tracked as they should.
- To avoid creating reviews for merge commits of Merge requests their messages should be default or start with the 'Merge pull request #'

GitLab

- When [configuring user remote accounts](#)^[804], user names must be entered as specified in the Name field of [Profile](#) settings (rather than the [Account](#) username).
- If repository contains a [CODEOWNERS file](#) that defines users responsible for certain files in a repository and integration can match those GitLab users with Collaborator users, then it will automatically add those users as reviewers on Collaborator's side.
- It is possible to additionally secure webhook calls by providing a Secret token while creating/modifying a webhook on GitLab server and a [GitLab configuration](#)^[769] on the Collaborator side. This token will be used as server signature for verifying webhook events. The Secret token parameter is optional and is not specified by default.
- To avoid creating reviews for merge commits of Merge requests their messages should be default or start with the 'Merge branch'
- Currently, GitLab integration does not support connecting to the target GitLab server through the proxy server.
- If a push or merge request in GitLab affects more than 200 files, the integration will process only first 200 files from the request and add those files to a review. This is caused by the limitation on the GitLab API side.

• GitLab Community / GitLab Enterprise

- When [configuring user remote accounts](#)^[804], user names must be entered as specified in the Name field of [Profile](#) settings (rather than the [Account](#) username).
- If repository contains a [CODEOWNERS file](#) that defines users responsible for certain files in a repository and integration can match those GitLab users with Collaborator users, then it will automatically add those users as reviewers on Collaborator's side.
- It is possible to additionally secure webhook calls by providing a Secret token while creating/modifying a webhook on GitLab server and a [GitLab configuration](#)^[769] on the Collaborator side. This token will be used as server signature for verifying webhook events. The Secret token parameter is optional and is not specified by default.

- To avoid creating reviews for merge commits of Merge requests their messages should be default or start with the 'Merge branch'
- Currently, GitLab integration does not support connecting to the target GitLab server through the proxy server.
- If a push or merge request in GitLab affects more than 200 files, the integration will process only first 200 files from the request and add those files to a review. This is caused by the limitation on the GitLab API side.
- By default, GitLab Community / GitLab Enterprise servers do not allow performing webhook requests to web services running in the same local network. If your Collaborator server resides on the same machine as GitLab server or within the same local network, then administrator of your GitLab server should enable the "Allow requests to the local network from hooks and services" option in the "Outbound requests" section inside the **Admin > Settings** area (<your-gitlab-server>/admin/application_settings).

Bitbucket

- When [configuring user remote accounts](#)^[804], user names must be entered as it is specified in the Name field of the [Bitbucket settings](#). Do not use the value of the Username field.
- While creating pull request on Bitbucket, you can add specific Bitbucket users as reviewers to this request. If integration can match those Bitbucket users with some Collaborator users (that is, if [User Remote Accounts](#)^[776] are properly configured), then it will automatically add those users as reviewers on Collaborator's side as well.
- In order to create reviews on pull requests from forked repositories the following conditions must comply: Forked repository of the same repository owner can be public or private. Forked repository of a different repository owner must be public repository.
- Just after a new Bitbucket configuration has been created, the very first push to a repository will not be tracked. Subsequent pushes will be tracked as they should.
- First push to newly created branch will be tracked only if it was branched out of master. Workaround: create new branch without commits - second push is tracked as it should.
- To avoid creating reviews for merge commits of Pull requests their messages should be default or start with the 'Merged in'
- Bitbucket will deprecate their API 1.0 starting from 29th of April 2019. You will need to upgrade to Collaborator version 11.5.11502 or later to use Bitbucket integration.

Bitbucket Server

- Current version of Collaborator supports Bitbucket Server versions 5.4 and later.
- Due to limitation on Bitbucket Server side, integration is not able to create reviews if the paths of submitted files contain the percent symbol (%).

- While creating pull request on Bitbucket, you can add specific Bitbucket users as reviewers to this request. If integration can match those Bitbucket users with some Collaborator users (that is, if [User Remote Accounts](#)^[776] are properly configured), then it will automatically add those users as reviewers on Collaborator's side as well.
- If some changes have been made both in feature branch and in upstream branch (for example, by cherry-picking), integration mimics the behaviour of the original Bitbucket Server and ignores those simultaneous changes in Branch Only mode of DiffViewer.
- In order to create reviews on pull requests from forked repositories the following conditions must comply: Forked repository of the same repository owner can be public or private. Forked repository of a different repository owner must be public repository.
- To avoid creating reviews for merge commits of Pull requests their messages should be default or start with the 'Merged in'

7.2 Configure Repository Hosting Service Integrations

This section describes how to setup integrations with remote repository hosting services supported by Collaborator.

- [GitHub](#)^[748]
- [Bitbucket Cloud](#)^[757]
- [Bitbucket Server \(On-Premise\)](#)^[764]
- [GitLab](#)^[769]
- [\(Common for all\) Link User Accounts](#)^[776]

7.2.1 Configure GitHub Integration

There are two ways to create a GitHub configuration: automatically via the Easy Add Repository wizard and manually via the Configure Remote Systems tab. The first approach is useful for adding new configurations, while the second allows adding new and modifying existing configurations. This section describes both of these ways.

- [Creating GitHub configuration via the Easy Add Repository wizard](#)^[749]
- [Creating GitHub configuration via the Configure Remote Systems tab](#)^[753]

Important. In order to use integration, your Collaborator server must be accessible to the remote system and vice versa. Configure a firewall or enable tunneled connections to expose your local Collaborator server to the Internet.

Creating GitHub configuration via the Easy Add Repository wizard

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Repository Hosting Services**
3. Switch to the **Easy Add Repository** tab.

4. Select *GitHub* in the the **Add repository for** combobox and click **Next**. This will display the Easy Add Repository wizard. It helps to setup remote repository configuration on the Collaborator side and add the webhook on the GitHub side.

Personal access token: [Token field]
Your personal token to access GitHub resources

Organization: [Organization field]
Required for organization selection

GitHub Enterprise host name (if applicable): [Host name field]
GitHub Enterprise URI

Webhooks secret token: [Secret token field]
Secret token to verify webhooks events. If provided, must be at least 8 characters long

Scopes for user: [Dropdown: Owner, Collaborator, Organization member]
GitHub user's repository list can include:
- Owner: Repositories that are owned by the authenticated user. (Default)
- Collaborator: Repositories that the user has been added to as a collaborator.
- Organization member: Repositories that the user has access to through being a member of an organization. This includes every repository on every team that the user is on.

Override Existing Configurations:
If checked, existing integration for the same repository URI will be overwritten

Branches to track: [Branches field]
Comma-separated list of branches.
[Java-style](#) regular expression can be used. Use '*' to track all branches.
If left empty, only master will be tracked.

Ignore pushes for branches: [Ignore pushes field]
Comma-separated list of branches for which pushes should be ignored.
[Java-style](#) regular expression can be used. Use '*' to ignore all branches.

Status check required: [False dropdown]
Enforce status checks for master and all tracked branches

When Review Completed: [Do nothing dropdown]
Action on Pull Request when review is completed

When Review Cancelled/Deleted/Rejected: [Do nothing dropdown]
Action on Pull Request when review is cancelled / deleted / rejected

Reopen a review when:
 Push to a PR
 Comment is added to a PR
 Comment on a commit is part of a PR

Select repositories: [Repository list dropdown]
Webhook for each selected repository will be created automatically

BACK **LOAD REPOSITORIES** **CREATE FOR SELECTED**

5. Specify the following settings in the wizard:

Setting	Description
Personal access token	Required. The personal access token for the GitHub account to be tracked.

	<p>Read Creating an access token for command-line use on GitHub documentation to learn how to obtain it. You will need to enable the following scopes: <code>repo</code>, <code>admin:org</code>, <code>admin:repo_hook</code> and <code>admin:org_hook</code>.</p>
Organization	<p>Required for organization repositories. Denotes the account name of GitHub organization.</p>
GitHub Enterprise host name	<p>Required for repositories hosted on GitHub Enterprise servers. Specifies the host name of your GitHub Enterprise server.</p>
Webhooks Secret token	<p>Optional. The secret token for webhook events. The secret token could be set when creating/modifying a webhook on GitHub server. If provided, must be at least 8 characters long.</p> <p>To learn more about webhook settings on the GitHub side, see GitHub documentation:</p> <p>https://developer.github.com/webhooks/</p>
Scopes for user	<p>Optional. Defines which types of repositories to track.</p> <p><u>Owner</u>: Repositories that are owned by the specified user. (Default)</p> <p><u>Collaborator</u>: Repositories that the user has been added to as a collaborator. Webhooks will be created for those repositories where allowed by the repository permissions for the specified user.</p> <p><u>Organization member</u>: Repositories that the user has access to through being a member of an organization. This includes every repository on every team that the user is on. Webhooks will be created for those repositories where allowed by the repository permissions for the specified user.</p>
Override existing configurations	<p>Optional. Specifies whether to override existing configurations that track the same repository URI.</p>
Branches to track	<p>Optional. The names of branches to track changes and create reviews on pull requests and direct pushes. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p> <p>If this field is empty, "master" branch will be tracked.</p>

Ignore pushes for branches	<p>Optional. Specifies branches for which Collaborator will not create reviews on direct pushes. You can enter one or several branch names. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p>
Status check required	<p>Specifies if the integration should enforce status checks for the tracked branches before merging pull request.</p> <p>If this option is enabled, you cannot use regular expressions in the "Branches to track" setting, since this option requires exact name match.</p>
When review completed	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was accomplished.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Merge pull request</u>: Merge pull request that corresponds to a review.</p> <p><u>Merge pull request and delete its branch</u>: Merge pull request that corresponds to a review and delete the respective branch.</p> <p><u>Close pull request</u>: Close pull request that corresponds to a review.</p> <p><u>Close pull request and delete its branch</u>: Close pull request that corresponds to a review and delete the respective branch.</p>
When review cancelled/deleted/rejected	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was cancelled, deleted or rejected.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Close pull request</u>: Close pull request that corresponds to a review.</p> <p><u>Close pull request and delete its branch</u>: Close pull request that corresponds to a review and delete the respective branch.</p>
Reopen a review when	<p>Optional. Specifies in what cases Collaborator should reopen completed reviews. May include any combination of the following:</p> <ul style="list-style-type: none"> • when a push to a pull request is made,

	<ul style="list-style-type: none"> • when a comment is added to a pull request, • when a comment is added to commit which is a part of a pull request
--	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

After specifying these values, you can click **Load repositories**. This will display a list of repositories available for the specified user or organization. Select which of them to track and click **Create for selected**.

Alternatively, you can click **Create for all** and add configurations for all repositories that are available for the specified user or organization.

For every repository a separate configuration will be created in Collaborator and a webhook will be added in GitHub.

Now you need to [link some Collaborator user account to the GitHub account](#) ^[776] of repository owner.

Creating GitHub configuration via the Configure Remote Systems tab

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Repository Hosting Services**
3. Switch to the **Configure Remote Systems** tab.
4. In the **New Remote System Configuration** section, select *GitHub* and click **Create**.
5. Collaborator will display a page with configuration settings. Specify the setting values:

Setting	Description
Title	Required. The configuration name as it will be displayed in Collaborator's user interface.
GitHub repo URI	<p>Required. The URI of GitHub repository to be tracked.</p> <p>For instance: <code>https://github.com/torvalds/linux.git</code></p> <p>You can copy it from the Clone URI field of the repository's main page on GitHub.</p>

GitHub API token	<p>Required. The personal access token for the GitHub account to be tracked.</p> <p>Read Creating an access token for command-line use on GitHub documentation to learn how to obtain it. You will need to enable the following scopes: <code>repo</code> and <code>admin:org</code>.</p>
Webhooks secret token	<p>Optional. The secret token for webhook events. The secret token could be set when creating/modifying a webhook on GitHub server. If provided, must be at least 8 characters long.</p> <p>To learn more about webhook settings on the GitHub side, see GitHub documentation:</p> <p>https://developer.github.com/webhooks/</p>
Branches to track	<p>Optional. The names of branches to track changes and create reviews on pull requests and direct pushes. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p> <p>If this field is empty, "master" branch will be tracked.</p>
Ignore pushes for branches	<p>Optional. Specifies branches for which Collaborator will not create reviews on direct pushes. You can enter one or several branch names. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p>
Status check required	<p>Specifies if the integration should enforce status checks for the tracked branches before merging pull request.</p> <p>If this option is enabled, you cannot use regular expressions in the "Branches to track" setting, since this option requires exact name match.</p>
When review completed	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was accomplished.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Merge pull request</u>: Merge pull request that corresponds to a review.</p>

	<p><u>Merge pull request and delete its branch</u>: Merge pull request that corresponds to a review and delete the respective branch.</p> <p><u>Close pull request</u>: Close pull request that corresponds to a review.</p> <p><u>Close pull request and delete its branch</u> : Close pull request that corresponds to a review and delete the respective branch.</p>
When Review cancelled/deleted/rejected	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was cancelled, deleted or rejected.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Close pull request</u>: Close pull request that corresponds to a review.</p> <p><u>Close pull request and delete its branch</u> : Close pull request that corresponds to a review and delete the respective branch.</p>
Reopen a review when	<p>Optional. Specifies in what cases Collaborator should reopen completed reviews. May include any combination of the following:</p> <ul style="list-style-type: none"> • when a push to a pull request is made, • when a comment is added to a pull request, • when a comment is added to commit which is a part of a pull request
Wait for signature (if enabled) before merge	<p>Optional. Effective, if "When review completed" setting is set to "Merge pull request" or "Merge pull request and delete its branch".</p> <p>If enabled Collaborator will wait for the completed review <u>to be signed off</u>¹⁸² before merging the respective pull request. Otherwise, pull request will be merged immediately, even if the review have not been signed yet.</p>
Webhook status	<p>Indicates current status of repository webhook:</p> <p><u>Webhook is absent</u> - A webhook is not created.</p> <p><u>Webhook isn't active</u> - A webhook is created, but is inactive.</p> <p><u>Up and running</u> - A webhook is active.</p>

	To create or activate a webhook, you can press the Update webhook button.
--	----------------------------------------------------------------------------------

After specifying these values, you can click **Test connection** to verify if you entered data correctly.

6. After you specified the values, click **Save**. This will create a configuration for the GitHub repository and add webhook for that repository on GitHub side.

Now you need to [link some Collaborator user account to the GitHub account](#) ^[776] of repository owner.

To learn more about webhook settings on the GitHub side, see GitHub documentation:

<https://developer.github.com/webhooks/>

Enable/Disable GitHub Integration

Once a new repository configuration is created, it is enabled automatically. However, you can enable and disable integration with GitHub servers manually. To do this:

1. Navigate to the **Admin > Remote System Integrations** screen.
2. Locate the **Enable GitHub Integration** setting and change it to **Yes** or **No**, respectively.

Configure SSL Connection for GitHub Enterprise

If your GitHub Enterprise server is using SSL connection, its certificates may not be trusted by Collaborator. To establish trust, you will need to create a "key store" and import the public key of the server as a trusted certificate. Obtain from your GitHub Enterprise or network administrator the appropriate certificate file. Then using Java's keytool (located in `$JAVA_HOME/bin`), import the certificate into a key store for Collaborator using the following command:

```
keytool -import -alias github -keystore <collab serverinstall dir>/  
tomcat/conf/collab.ks -trustcacerts  
-file <path to chain certificate file>
```

Important: You will likely be prompted to confirm the validity of the certificate. It is imperative for the security of the overall system that you verify the key matches the trusted material. Before accepting the certificate, you should contact the administrator that sent you the certificates and verify that the certificate fingerprints that you see match the certificate fingerprints that they intended to send you. For more information on why this step is important, see the note in the [keytool documentation](#).

The final step is to configure Collaborator to use the newly created keystore. Open `<collab server install dir>/ccollab-server.vmoptions` in a text editor and add the following lines:

```
-Djavax.net.ssl.trustStore=<collab server install dir>/tomcat/conf/collab.ks
-Djavax.net.ssl.trustStorePassword=<the password>
```

7.2.2 Configure Bitbucket Integration

There are two ways to create a Bitbucket configuration: automatically via the Easy Add Repository wizard and manually via the Configure Remote Systems tab. The first approach is useful for adding new configurations, while the second allows adding new and modifying existing configurations. This section describes both of these ways.

- [Creating Bitbucket configuration via the Easy Add Repository wizard](#) 
- [Creating Bitbucket configuration via the Configure Remote Systems tab](#) 

Important. In order to use integration, your Collaborator server must be accessible to the remote system and vice versa. Configure a firewall or enable tunneled connections to expose your local Collaborator server to the Internet.

Creating Bitbucket configuration via the Easy Add Repository wizard

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Repository Hosting Services**
3. Switch to the **Easy Add Repository** tab.

4. Select *Bitbucket* in the the **Add repository for** combobox and click **Next**. This will display the Easy Add Repository wizard. It helps to setup remote repository configuration on the Collaborator side and add the webhook on the Bitbucket side.

Username: JohnSmithSB
Required for authentication

App password: #Fak0nd.r75gh9ekidogp4E
Your app password to access Bitbucket resources

Team name: _____
Required for team selection

User role: Owner
Admin
Member
Contributor

Bitbucket user's (team's) repository list can include:
 - Owner: Repositories owned by the current user. (Default)
 - Admin: Repositories to which the user has administrator access.
 - Member: Repositories to which the user has read access.
 - Contributor: Repositories to which the user has write access.

Override Existing Configurations:
If checked, existing integration for the same repository URI will be overwritten

Branches to track: _____
Comma-separated list of branches.
[Java-style](#) regular expression can be used. Use '*' to track all branches.
If left empty, only master will be tracked.

Ignore pushes for branches: _____
Comma-separated list of branches for which pushes should be ignored.
[Java-style](#) regular expression can be used. Use '*' to ignore all branches.

When Review Completed: Do nothing
Action on Pull Request when review is completed

When Review Cancelled/Deleted/Rejected: Do nothing
Action on Pull Request when review is cancelled / deleted / rejected

Reopen a review when:
 Push to a PR
 Comment is added to a PR
 Comment on a commit is part of a PR

Select repositories: JohnSmithSB/testrepoforcollaborator
JohnSmithSB/ngtest1
Webhook for each selected repository will be created automatically

BACK **LOAD REPOSITORIES** **CREATE FOR SELECTED**

5. Specify the following settings in the wizard:

Setting	Description
Username	Required. Specifies the user account name for single-user repositories, or an account name to use for authentication in Team repositories.
App password	Required. The App password for the Bitbucket account to be tracked.

	<p>Read App passwords on Bitbucket documentation to learn how to create App passwords. For integration with Collaborator you need to enable Read, Write, and Admin permissions for Repositories category and Read and Write permissions for Pull requests and Webhooks categories.</p>
Team name	<p>Optional. Required for team repositories. Denotes the team account name.</p>
User role	<p>Optional. Defines which types of repositories to track.</p> <p><u>Owner</u>: Repositories that are owned by the specified user. (Default)</p> <p><u>Admin</u>: Repositories to which the user has administrator access.</p> <p><u>Member</u>: Repositories to which the user has read access.</p> <p>Webhooks will be created for those repositories where allowed by the repository permissions for the specified user.</p> <p><u>Contributor</u>: Repositories to which the user has write access.</p> <p>Webhooks will be created for those repositories where allowed by the repository permissions for the specified user.</p>
Override existing configurations	<p>Optional. Specifies whether to override existing configurations that track the same repository URI.</p>
Branches to track	<p>Optional. The names of branches to track changes and create reviews on pull requests and direct pushes. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p> <p>If this field is empty, main branch in the repository will be tracked ("master" for Git repositories and "default" for Mercurial repositories).</p>
Ignore pushes for branches	<p>Optional. Specifies branches for which Collaborator will not create reviews on direct pushes. You can enter one or several branch names. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p>

<p>When review completed</p>	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was accomplished.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Merge pull request</u>: Merge pull request that corresponds to a review.</p> <p><u>Merge pull request and close its branch</u>: Merge pull request that corresponds to a review and close the respective branch.</p> <p><u>Decline pull request</u>: Decline pull request that corresponds to a review.</p>
<p>When review cancelled/deleted/rejected</p>	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was cancelled, deleted or rejected.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Decline pull request</u>: Decline pull request that corresponds to a review.</p>
<p>Reopen a review when</p>	<p>Optional. Specifies in what cases Collaborator should reopen completed reviews. May include any combination of the following:</p> <ul style="list-style-type: none"> • when a push to a pull request is made, • when a comment is added to a pull request, • when a comment is added to commit which is a part of a pull request

After specifying these values, you can click **Load repositories**. This will display a list of repositories available for the specified user. Select which of them to track and click **Create for selected**.

Alternatively, you can click **Create for all** and add configurations for all repositories that are available for the specified user.

For every repository a separate configuration will be created in Collaborator and a webhook will be added in Bitbucket.

Now you need to [link some Collaborator user account to the Bitbucket account](#) ^[776] of repository owner.

Creating Bitbucket configuration via the Configure Remote Systems tab

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Repository Hosting Services**
3. Switch to the **Configure Remote Systems** tab.
4. In the **New Remote System Configuration** section, select *Bitbucket* and click **Create**.
5. Collaborator will display a page with configuration settings. Specify the setting values:

Setting	Description
Title	Required. The configuration name as it will be displayed in Collaborator's user interface.
Bitbucket repo URI	<p>Required. The URI of Bitbucket repository to be tracked.</p> <p>For instance: <i>https://bitbucket.org/jakenherman/awesome-java</i></p> <p>Both Mercurial and Git repositories are supported. You should copy the repository URI from the browser's address bar, rather than from the repository's clone URI.</p>
App password	<p>Required. The App password for the Bitbucket account to be tracked.</p> <p>Read App passwords on Bitbucket documentation to learn how to create App passwords. For integration with Collaborator you need to enable Read, Write, and Admin permissions for Repositories category and Read and Write permissions for Pull requests and Webhooks categories.</p>
Username for authentication	Optional. Required for team repositories. Specifies an account name to use for authentication in Team repositories. For single-user repositories, account name is taken from the repo URI.

<p>Branches to track</p>	<p>Optional. The names of branches to track changes and create reviews on pull requests and direct pushes. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p> <p>If this field is empty, main branch in the repository will be tracked ("master" for Git repositories and "default" for Mercurial repositories).</p>
<p>Ignore pushes for branches</p>	<p>Optional. Specifies branches for which Collaborator will not create reviews on direct pushes. You can enter one or several branch names. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p>
<p>When review completed</p>	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was accomplished.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Merge pull request</u>: Merge pull request that corresponds to a review.</p> <p><u>Merge pull request and close its branch</u>: Merge pull request that corresponds to a review and close the respective branch.</p> <p><u>Decline pull request</u>: Decline pull request that corresponds to a review.</p>
<p>When review cancelled/deleted/rejected</p>	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was cancelled, deleted or rejected.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Decline pull request</u>: Decline pull request that corresponds to a review.</p>
<p>Reopen a review when</p>	<p>Optional. Specifies in what cases Collaborator should reopen completed reviews. May include any combination of the following:</p> <ul style="list-style-type: none"> • when a push to a pull request is made, • when a comment is added to a pull request,

	<ul style="list-style-type: none"> when a comment is added to commit which is a part of a pull request
Wait for signature (if enabled) before merge	<p>Optional. Effective, if "When review completed" setting is set to "Merge pull request" or "Merge pull request and delete its branch".</p> <p>If enabled Collaborator will wait for the completed review <u>to be signed off</u>^[182] before merging the respective pull request. Otherwise, pull request will be merged immediately, even if the review have not been signed yet.</p>
Webhook status	<p>Indicates current status of repository webhook:</p> <p><u>Webhook is absent</u> - A webhook is not created.</p> <p><u>Webhook isn't active</u> - A webhook is created, but is inactive.</p> <p><u>Up and running</u> - A webhook is active.</p> <p>To create or activate a webhook, you can press the Update webhook button.</p>

After specifying these values, you can click **Test connection** to verify if you entered data correctly.

6. After you specified the values, click **Save**. This will create a configuration for the Bitbucket repository and add webhook for that repository on Bitbucket side.

Now you need to link some Collaborator user account to the Bitbucket account^[776] of repository owner.

To learn more about webhook settings on the Bitbucket side, see Bitbucket documentation:

<https://confluence.atlassian.com/bitbucket/manage-webhooks-735643732.html>

Enable/Disable Bitbucket Integration

Once a new repository configuration is created, it is enabled automatically. However, you can enable and disable integration with Bitbucket servers manually. To do this:

1. Navigate to the **Admin > Remote System Integrations** screen.
2. Locate the **Enable Bitbucket Integration** setting and change it to **Yes** or **No**, respectively.

7.2.3 Configure Bitbucket Server Integration

There are two ways to create a Bitbucket Server configuration: automatically via the Easy Add Repository wizard and manually via the Configure Remote Systems tab. The first approach is useful for adding new configurations, while the second allows adding new and modifying existing configurations. This section describes both of these ways.

- [Creating Bitbucket Server configuration via the Easy Add Repository wizard](#) ⁷⁶⁴
- [Creating Bitbucket Server configuration via the Configure Remote Systems tab](#) ⁷⁶⁷

Important: Do not confuse *Bitbucket Server (On-Premise)* and *Bitbucket* configurations. Bitbucket Server is a self-hosted version of Bitbucket.

Important. In order to use integration, your Collaborator server must be accessible to the remote system and vice versa. Configure a firewall or enable tunneled connections to expose your local Collaborator server to the Internet.

Creating Bitbucket Server configuration via the Easy Add Repository wizard

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Repository Hosting Services**
3. Switch to the **Easy Add Repository** tab.

- Select *Bitbucket Server (On-Premise)* in the the **Add repository for** combobox and click **Next**. This will display the Easy Add Repository wizard. It helps to setup remote repository configuration on the Collaborator side and add the webhook on the Bitbucket Server side.

- Specify the following settings in the wizard:

Setting	Description
Admin username	Required. Username of Bitbucket Server administrator.
Admin password	Required. Password of Bitbucket Server administrator.
Host name	Required. Denotes the host name of your Bitbucket Server.
Override existing configurations	Optional. Specifies whether to override existing configurations that track the same repository URI.
Branches to track	Optional. The names of branches to track changes and create reviews on pull requests and direct pushes. Separate multiple branch names with commas.

	<p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p> <p>If this field is empty, main branch in the repository will be tracked ("master" for Git repositories and "default" for Mercurial repositories).</p>
Ignore pushes for branches	<p>Optional. Specifies branches for which Collaborator will not create reviews on direct pushes. You can enter one or several branch names. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p>
When review completed	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was accomplished.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Merge pull request</u>: Merge pull request that corresponds to a review.</p> <p><u>Merge pull request and close its branch</u>: Merge pull request that corresponds to a review and close the respective branch.</p> <p><u>Decline pull request</u>: Decline pull request that corresponds to a review.</p>
When review cancelled/deleted/rejected	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was cancelled, deleted or rejected.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Decline pull request</u>: Decline pull request that corresponds to a review.</p>
Reopen a review when	<p>Optional. Specifies in what cases Collaborator should reopen completed reviews. May include any combination of the following:</p> <ul style="list-style-type: none"> • when a push to a pull request is made, • when a comment is added to a pull request, • when a comment is added to commit which is a part of a pull request

After specifying these values, you can click **Load repositories**. This will display a list of repositories available for the specified user. Select which of them to track and click **Create for selected**.

Alternatively, you can click **Create for all** and add configurations for all repositories that are available for the specified user.

For every repository a separate configuration will be created in Collaborator and a webhook will be added in Bitbucket Server.

Now you need to [link some Collaborator user account to the Bitbucket account](#) ⁽⁷⁷⁶⁾ of repository owner.

Creating Bitbucket configuration via the Configure Remote Systems tab

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Repository Hosting Services**
3. Switch to the **Configure Remote Systems** tab.
4. In the **New Remote System Configuration** section, select *Bitbucket Server (On-Premise)* and click **Create**.
Important: Do not confuse *Bitbucket Server (On-Premise)* and *Bitbucket* configurations. Bitbucket Server is a self-hosted version of Bitbucket.
5. Collaborator will display a page with configuration settings. Specify the setting values:

Setting	Description
Title	Required. The configuration name as it will be displayed in Collaborator's user interface.
Bitbucket repo URI	Required. The URI of Bitbucket repository to be tracked. For instance: <code>http://hostname/projects/PROJ/repos/my_repo</code> Both Mercurial and Git repositories are supported. You should copy the repository URI from the browser's address bar, rather than from the repository's clone URI.
Admin username	Required. Username of Bitbucket Server administrator.

Admin password	Required. Password of Bitbucket Server administrator.
Branches to track	<p>Optional. The names of branches to track changes and create reviews on pull requests and direct pushes. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p> <p>If this field is empty, main branch in the repository will be tracked ("master" for Git repositories and "default" for Mercurial repositories).</p>
Ignore pushes for branches	<p>Optional. Specifies branches for which Collaborator will not create reviews on direct pushes. You can enter one or several branch names. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p>
When review completed	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was accomplished.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Merge pull request</u>: Merge pull request that corresponds to a review.</p> <p><u>Merge pull request and close its branch</u>: Merge pull request that corresponds to a review and close the respective branch.</p> <p><u>Decline pull request</u>: Decline pull request that corresponds to a review.</p>
When review cancelled/deleted/rejected	<p>Optional. Specifies what action to perform when a review corresponding to a pull request was cancelled, deleted or rejected.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Decline pull request</u>: Decline pull request that corresponds to a review.</p>
Reopen a review when	<p>Optional. Specifies in what cases Collaborator should reopen completed reviews. May include any combination of the following:</p> <ul style="list-style-type: none"> • when a push to a pull request is made,

	<ul style="list-style-type: none"> • when a comment is added to a pull request, • when a comment is added to commit which is a part of a pull request
Wait for signature (if enabled) before merge	<p>Optional. Effective, if "When review completed" setting is set to "Merge pull request" or "Merge pull request and delete its branch".</p> <p>If enabled Collaborator will wait for the completed review <u>to be signed off</u>^[182] before merging the respective pull request. Otherwise, pull request will be merged immediately, even if the review have not been signed yet.</p>
Webhook status	<p>Indicates current status of repository webhook:</p> <p><u>Webhook is absent</u> - A webhook is not created.</p> <p><u>Webhook isn't active</u> - A webhook is created, but is inactive.</p> <p><u>Up and running</u> - A webhook is active.</p> <p>To create or activate a webhook, you can press the Update webhook button.</p>

After specifying these values, you can click **Test connection** to verify if you entered data correctly.

6. After you specified the values, click **Save**. This will create a Bitbucket Server (On-Premise) configuration on the Collaborator side and add the webhook on the Bitbucket Server side.

Now you need to link some Collaborator user account to the Bitbucket account^[776] of repository owner.

To learn more about webhook settings on the Bitbucket side, see Bitbucket documentation:

<https://confluence.atlassian.com/bitbucket/manage-webhooks-735643732.html>

7.2.4 Configure GitLab Integration

There are two ways to create a GitLab configuration: automatically via the Easy Add Repository wizard and manually via the Configure Remote Systems tab. The first approach is useful for adding new configurations, while the second allows adding new and modifying existing configurations. This section describes both of these ways.

- Creating GitLab configuration via the Easy Add Repository wizard^[770]
- Creating GitLab configuration via the Configure Remote Systems tab^[773]

Important. In order to use integration, your Collaborator server must be accessible to the remote system and vice versa. Configure a firewall or enable tunneled connections to expose your local Collaborator server to the Internet.

Creating GitLab configuration via the Easy Add Repository wizard

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Repository Hosting Services**
3. Switch to the **Easy Add Repository** tab.
4. Select *GitLab* in the the **Add repository for** combobox and click **Next**. This will display the Easy Add Repository wizard. It helps to setup remote repository configuration on the Collaborator side and add the webhook on the GitLab side.

The screenshot shows the 'Easy Add Repository' wizard for GitLab. The form is divided into several sections with labels on the left and input fields on the right. The labels are: Private token, Group, GitLab Community host name (If applicable), Webhooks secret token, Override Existing Configurations, Branches to track, Ignore pushes for branches, When Review Completed, When Review Cancelled/Deleted/Rejected, Reopen a review when, and Select repositories. The input fields contain: a private token, an empty group field, an empty host name field, a secret token 'pnd35h1cxg49', an unchecked checkbox for overriding configurations, an empty branches to track field, an empty ignore pushes field, a dropdown menu set to 'Do nothing' for when review is completed, another dropdown menu set to 'Do nothing' for when review is cancelled/deleted/rejected, three unchecked checkboxes for 'Reopen a review when' (Push to a PR, Comment is added to a PR, Comment on a commit is part of a PR), and a dropdown menu set to 'JohnSmithSB/my-awesome-project' for 'Select repositories'. At the bottom of the form are three buttons: 'BACK', 'LOAD REPOSITORIES', and 'CREATE FOR SELECTED'.

5. Specify the following settings in the wizard:

Setting	Description
Private token	<p>Required. The private token for the GitLab account to be tracked.</p> <p>You can copy it from the Access Tokens section of User Settings on GitLab. You will need to enable the <code>api</code> scope for this token.</p>
Group	<p>Required for group repositories. Denotes the account name of GitLab group.</p>
GitLab Community host name	<p>Required for repositories on self-hosted servers. Specifies the host name of your GitLab Enterprise or GitLab Community server.</p>
Webhooks Secret token	<p>Optional. The secret token for webhook events. The secret token could be set when creating/modifying a webhook on GitLab server. If provided, must be at least 8 characters long.</p> <p>To learn more about webhook settings on the GitLab side, see GitLab documentation:</p> <p>https://gitlab.com/help/user/project/integrations/webhooks.md</p>
Override existing configurations	<p>Optional. Specifies whether to override existing configurations that track the same repository URI.</p>
Branches to track	<p>Optional. The names of branches to track changes and create reviews on pull requests and direct pushes. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the <code>*</code> wildcard (alone, or separated by comma) to match all branches.</p> <p>If this field is empty, "master" branch will be tracked.</p>
Ignore pushes for branches	<p>Optional. Specifies branches for which Collaborator will not create reviews on direct pushes. You can enter one or several branch names. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the <code>*</code> wildcard (alone, or separated by comma) to match all branches.</p>
When review completed	<p>Optional. Specifies what action to perform when a review corresponding to a merge request was accomplished.</p> <p><u>Do nothing</u>: Do not perform any action.</p>

	<p><u>Merge the merge request</u>: Merge the request that corresponds to a review.</p> <p><u>Merge the merge request and delete source branch</u>: Merge the request that corresponds to a review and delete the respective branch.</p> <p><u>Close merge request</u>: Close merge request that corresponds to a review.</p>
When Review Cancelled/Deleted/Rejected	<p>Optional. Specifies what action to perform when a review corresponding to a merge request was cancelled, deleted or rejected.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Close merge request</u>: Close merge request that corresponds to a review.</p>
Reopen a review when	<p>Optional. Specifies in what cases Collaborator should reopen completed reviews. May include any combination of the following:</p> <ul style="list-style-type: none"> • when a push to a pull request is made, • when a comment is added to a pull request, • when a comment is added to commit which is a part of a pull request

After specifying these values, you can click **Load repositories**. This will display a list of repositories available for the specified user or group. Select which of them to track and click **Create for selected**.

Alternatively, you can click **Create for all** and add configurations for all repositories that are available for the specified user or group.

For every repository a separate configuration will be created in Collaborator and a webhook will be added in GitLab.

Now you need to link some Collaborator user account to the GitLab account ^[776] of repository owner.

Creating GitLab configuration via the Configure Remote Systems tab

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Repository Hosting Services**
3. Switch to the **Configure Remote Systems** tab.
4. In the **New Remote System Configuration** section, select *GitLab* and click **Create**.
5. Collaborator will display a page with configuration settings. Specify the setting values:

Setting	Description
Title	Required. The configuration name as it will be displayed in Collaborator's user interface.
GitLab repo URI	Required. The URI of GitLab repository to be tracked. For instance: https://gitlab.com/gitlab-org/gitlab-ee.git You can copy it from the Clone URI field of the repository's main page on GitLab.
Private token	Required. The private token for the GitLab account to be tracked. You can copy it from the Access Tokens section of User Settings on GitLab. You will need to enable the <code>api</code> scope for this token.
Webhooks Secret token	Optional. The secret token for webhook events. The secret token could be set when creating/modifying a webhook on GitLab server. If provided, must be at least 8 characters long. To learn more about webhook settings on the GitLab side, see GitLab documentation: https://gitlab.com/help/user/project/integrations/webhooks.md
Branches to track	Optional. The names of branches to track changes and create reviews on pull requests and direct pushes. Separate multiple branch names with commas.

	<p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p> <p>If this field is empty, "master" branch will be tracked.</p>
Ignore pushes for branches	<p>Optional. Specifies branches for which Collaborator will not create reviews on direct pushes. You can enter one or several branch names. Separate multiple branch names with commas.</p> <p>You may use Java-style regular expressions to match specific branch names, or you may use the '*' wildcard (alone, or separated by comma) to match all branches.</p>
When review completed	<p>Optional. Specifies what action to perform when a review corresponding to a merge request was accomplished.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Merge the merge request</u>: Merge the request that corresponds to a review.</p> <p><u>Merge the merge request and delete source branch</u>: Merge the request that corresponds to a review and delete the respective branch.</p> <p><u>Close merge request</u>: Close merge request that corresponds to a review.</p>
When review cancelled/deleted/rejected	<p>Optional. Specifies what action to perform when a review corresponding to a merge request was cancelled, deleted or rejected.</p> <p><u>Do nothing</u>: Do not perform any action.</p> <p><u>Close merge request</u>: Close merge request that corresponds to a review.</p>
Reopen a review when	<p>Optional. Specifies in what cases Collaborator should reopen completed reviews. May include any combination of the following:</p> <ul style="list-style-type: none"> • when a push to a pull request is made, • when a comment is added to a pull request, • when a comment is added to commit which is a part of a pull request

<p>Wait for signature (if enabled) before merge</p>	<p>Optional. Effective, if "When review completed" setting is set to "Merge pull request" or "Merge pull request and delete its branch".</p> <p>If enabled Collaborator will wait for the completed review <u>to be signed off</u>^[182] before merging the respective pull request. Otherwise, pull request will be merged immediately, even if the review have not been signed yet.</p>
<p>Webhook status</p>	<p>Indicates current status of repository webhook:</p> <p><u>Webhook is absent</u> - A webhook is not created.</p> <p><u>Webhook isn't active</u> - A webhook is created, but is inactive.</p> <p><u>Up and running</u> - A webhook is active.</p> <p>To create or activate a webhook, you can press the Update webhook button.</p>

After specifying these values, you can click **Test connection** to verify if you entered data correctly.

6. After you specified the values, click **Save**. This will create a configuration for the GitLab repository and add webhook for that repository on GitLab side.

Now you need to link some Collaborator user account to the GitLab account^[776] of repository owner.

To learn more about webhook settings on the GitLab side, see GitLab documentation:

<https://gitlab.com/help/user/project/integrations/webhooks.md>

Enable/Disable GitLab Integration

Once a new repository configuration is created, it is enabled automatically. However, you can enable and disable integration with GitLab servers manually. To do this:

1. Navigate to the **Admin > Remote System Integrations** screen.
2. Locate the **Enable GitLab Integration** setting and change it to **Yes** or **No**, respectively.

7.2.5 Link User Accounts

Collaborator [automatically creates reviews](#)^[735] for changes made to [web-based repositories](#)^[748]. At that, it can automatically make the person, who is changing files in the repo, an [author](#)^[253] of the review. The problem is that by default Collaborator has no information about source control accounts.

You and your teammates can link source-control accounts with their Collaborator accounts. After that, when creating a new review, Collaborator will be able to find a respective Collaborator user, will make that user the creator of the review and will assign an author role to that user in the review.

If Collaborator fails to match the repository user and a Collaborator user, it will make the Collaborator Administrator the creator and author of the new review.

How do you link accounts?

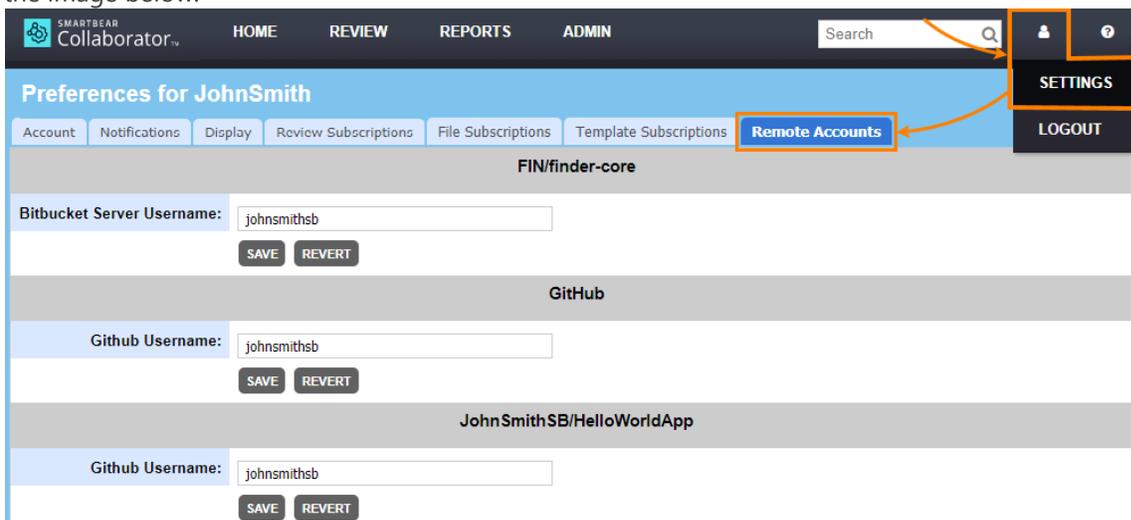
Make sure, that you have specified your user name and email address on your local machine (either globally, or for specific repository). To learn how to do this, see [Git](#) or [Mercurial](#) instructions, respectively.

Specify the same user name and email address in your remote repository profile.

If the name of a Collaborator user account coincides with the name of a source-control user account, Collaborator will link these two accounts automatically.

If the names differ, then you should link accounts manually:

1. In Collaborator, go to **Settings** > and then switch to the **Remote Accounts** tab. This tab displays a list of remote system configurations that your Collaborator server uses. Since configuration titles are defined by your Collaborator administrators, they may vary from the image below:



2. Specify your account names for those web-based repositories, on which you have accounts.
For Bitbucket users: enter your Bitbucket name exactly as it is specified in the Name field of the [Bitbucket settings](#). Do not use the value of the Username field.
For GitLab users: enter your GitLab name exactly as it is specified in the Name field of the [Profile settings](#) settings. Do not use the value of the [Account](#) field.
Press **Save** to apply the changes.

8 Issue-Tracking Integrations

Collaborator can integrate with any external issue-tracking systems such as JIRA, TeamTrack, Bugzilla, FogBugz and so on. This gives you the possibility to associate issues with reviews and vice versa, hyperlink mentioned issues, move or mirror defects from Collaborator to your issue-tracking system.

The integration saves the time and efforts needed to synchronize your issue-tracking items and Collaborator reviews, and helps you be concentrated on your business tasks rather than on the integration procedures.

In This Section

- [Issue-Tracking Integrations: Overview](#)⁷⁷⁸
Describes dedicated support for integration with JIRA issue-tracking and Team Foundation Server work item systems, which allows to associate issues with reviews and vice versa, hyperlink mentioned issues, move or mirror defects from Collaborator to your issue-tracking system.
- [Configuring Issue-Tracking Integrations](#)⁷⁸¹
Describes how to setup integrations with remote issue-tracking systems supported by Collaborator.
- [General Approach to Issue-Tracking Integrations](#)⁷⁸⁶
Describes general approach to integration with any issue-tracking system. Integration can be done in several ways depending on your needs.
- [JIRA Legacy Integration](#)⁷⁸⁷
Describes legacy integration with JIRA, which allows you to create Collaborator reviews from JIRA tickets' linked commits or use JIRA as notification channel.

Note: There are two types of remote system configurations designed to establish integration with JIRA. They are named JIRA and JIRA Legacy. JIRA integration allows you to associate issues with reviews and vice versa, hyperlink mentioned issues, move or mirror defects from Collaborator to your JIRA server. JIRA Legacy integration allows you to create Collaborator reviews from JIRA tickets' linked commits or use JIRA as notification channel. This type of integration was introduced in earlier versions of Collaborator and we recommend that you use "ordinary" JIRA integration instead.

8.1 Issue-Tracking Integrations: Overview

Collaborator provides advanced support for JIRA issue-tracking and Team Foundation Server work item systems, giving you the possibility to easily integrate these products into your work processes. It automatically synchronizes reviews and the issues/work items addressed in those reviews, appends the issues to the review's Remote System Links section and retrieves the item's current status.

[Requirements](#)^[778]

[How Issue-Tracking Integration Works](#)^[778]

[Technical Details](#)^[781]

[Related Topics](#)^[781]

Note: There are two types of remote system configurations designed to establish integration with JIRA. They are named JIRA and JIRA Legacy. JIRA integration allows you to associate issues with reviews and vice versa, hyperlink mentioned issues, move or mirror defects from Collaborator to your JIRA server. JIRA Legacy integration allows you to create Collaborator reviews from JIRA tickets' linked commits or use JIRA as notification channel. This type of integration was introduced in earlier versions of Collaborator and we recommend that you use "ordinary" JIRA integration instead.

For other issue-tracking systems, your Collaborator administrator should establish integration as described in [General Approach to Issue-Tracking Integrations](#)^[786].

Requirements

Server versions:

- JIRA server 5.0 and higher.
- Team Foundation Server 2010 and higher.

Setup and configure integration - Your Collaborator administrator should create a new Remote System Integration configuration for your issue-tracking/work item system. The configuration defines what server to use, access credentials, list of projects to track and so on. Each single configuration instance tracks changes on a single server. To track multiple issue-tracker/work item servers, your administrators should create a separate configuration for each server. For detailed instructions on how to setup integration, see [Configuring Issue-Tracking Integrations](#)^[781].

How Issue-Tracking Integration Works

Collaborator checks if the uploaded review materials are associated with any tickets/work items. Depending on system, Collaborator either retrieves this information from the changelist service data or parses review title, custom fields, changelist comments, comments and defects to match ticket/work item identifiers.

Once Collaborator finds that the review materials are associated with some ticket or work item, it performs the following:

- **Links ticket or work item to a review.** All linked tickets/work items, as well as their current statuses, will be displayed in the review's [Remote System Links](#)^[323] section. This feature is enabled automatically, when the respective [issue-tracker configuration](#)^[781] is created and integration is enabled.

Remote System	Linked Item	Status	Action	Remove
SmartBear/collab-core (main repository)	PR#179: COLLAB-2727 Improve subscription feature for "Review Pools"	OPEN		
SmartBear JIRA	COLLAB-2727: Improve subscription feature for "Review Pools"	IN REVIEW		
SmartBear JIRA	COLLAB-2838: Groups need to be able to subscribe to file patterns	IN REVIEW		

Review with links to JIRA tickets

- **Links review to a ticket or work item.** A link will be appended to a ticket/work item, if an issue-tracking system permits it. This feature is enabled automatically, when the respective [issue-tracker configuration](#)^[781] is created and integration is enabled.

Austin-Collaborator / COLLAB-2838

Groups need to be able to subscribe to file patterns

[Edit](#) [Comment](#) [Assign](#) [In Smoke build](#) [Close](#) [Send to Bug Pool](#)

Details

Type:	Bug	Status:	CODE MERGED (View workflow)
Priority:	Critical	Resolution:	Unresolved
Affects Version/s:	None	Fix Version/s:	11.1.11100
Component/s:	None		
Labels:	None		
	Internal		

Attachments

Drop files to attach, or [browse](#).

Issue links

relates to [COLLAB-2846](#) Group "Review Subscriptions" and group "File Subscription..." CODE MERGED

[COLLAB-2727](#) Improve subscription feature for "Review Pools" TO DO

links to [Review #12025: Github pull request #179. COLLAB-2727 Improve subscri...](#)

JIRA ticket with link to review

Work Items* Backlogs Queries

TASK 3*

3 Eliminate bottlenecks from foobar

John Smith 1 comment Add tag Save Follow Refresh Undo ...

State Closed Area MyFirstProject Updated 7 minutes ago

Reason Completed Iteration MyFirstProject\Iteration 1

Links

Link ↑	State	Latest Update	Comment
Changeset			
Changeset 7		Created Wednesday	Eliminate bottlenecc...
Hyperlink			
http://collabserver:8080/ui#reviewid=29	...		Review #29: Elimina...

Team Foundation Server work item with link to review

- **Converts ticket identifier into hyperlink.** (JIRA Only.) This is similar to creating automatic links manually, however requires less effort, since appropriate links will be configured automatically on the basis of the specified issue-tracking server. This feature is enabled by default and controlled by the [Automatically Add Remote System Links](#)^[234] template setting.

Overall

John Smith on 6/26/2017 at 12:32:07 PM

See [COLLAB-2794](#) for details

- **Allows to create tickets for external defects.** (JIRA Only.) You can create tickets in your issue-tracker directly from the Collaborator reviews. This feature is disabled by default. To enable defect export, go to the [Review Templates](#)^[230] screen, edit the appropriate template, change the ["Automatically Create New Work Item for External Defects"](#)^[234] setting for that specific system field to "Enabled" and select which project will be pre-selected in the dialog that suggests creating a ticket/work item.

ADD ADD AS DEFECT

Edit Defect: D1 1

Track externally Export issue

Refactor imports, please.

Severity: Major

Type: Performance

OK CANCEL

To start a new conversation, click on a line at right.

Create external issue 2

Summary Refactor imports, please.

Type: Performance
Severity: Major

Description Defect chat:
John Smith 2018-04-13 19:03 Created defect D1: Refactor imports, please. : Major / Performance

Remote System ACME JIRA

Project COLLAB

Issue type

CREATE ISSUE CANCEL

Technical Details

- Item statuses in the Remote System Links are updated upon webhook events (if a remote system supports webhooks), or periodically (default interval is every 2 minutes and can be adjusted via [VM option](#)¹⁰⁹³).
- The "Project List" field of JIRA configurations can contain up to 2000 characters, whereas for JIRA (Legacy) configurations it can contain only 255 characters.
- Connections established by JIRA integrations do respect [proxy settings](#)⁸⁸ if they are specified for Collaborator server.
- Team Foundation Server work items do not have unique identifier except for their ordinal number. Because of this, Collaborator cannot determine work item identifiers within review's text fields (title, custom fields, comments and others) and, consequently, cannot automatically convert them into hyperlinks.
- Currently, creating tickets for external defects is only available for JIRA issue-tracking systems.
- When creating tickets for external defects on JIRA servers, the dialog may display additional fields depending on server's custom fields configuration. Currently, integration is able to retrieve and display standard custom fields. Advanced custom fields are not supported yet. If advanced custom fields are mandatory for creating new tickets, Collaborator will fail to create it.

Related Topics

[General Approach to Issue-Tracking Integrations](#)⁷⁸⁶

This topic describes general approach to integration with any issue-tracking system. Integration can be done in several ways depending on your needs.

[JIRA \(Legacy\) Integration](#)⁷⁸⁷

This section describes legacy integration with JIRA, which allows you to create Collaborator reviews from JIRA tickets' linked commits or use JIRA as notification channel.

8.2 Configuring Issue-Tracking Integrations

This section describes how to setup integrations with remote issue-tracking systems supported by Collaborator.

- [Configuring JIRA Integration](#)⁷⁸²

- [Configuring TFS Work Item Integration](#)^[784]
- [Configuring JIRA Legacy Integration](#)^[791]

Note: There are two types of remote system configurations designed to establish integration with JIRA. They are named JIRA and JIRA Legacy. JIRA integration allows you to associate issues with reviews and vice versa, hyperlink mentioned issues, move or mirror defects from Collaborator to your JIRA server. JIRA Legacy integration allows you to create Collaborator reviews from JIRA tickets' linked commits or use JIRA as notification channel. This type of integration was introduced in earlier versions of Collaborator and we recommend that you use "ordinary" JIRA integration instead.

For other issue-tracking systems, your Collaborator administration should establish integration as described in [General Approach to Issue-Tracking Integrations](#)^[786].

8.2.1 Configuring JIRA Integration

This topic describes how to setup Collaborator integration with JIRA issue-tracking system. To learn general principles of how any issue-tracking integration operates, see [Issue-Tracking Integrations: Overview](#)^[778].

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Issue-Tracking Services**
3. In the **New Remote System Configuration** section, select *JIRA* and click **Create**. This will display the configuration settings.

Important: Do not confuse *JIRA* and *JIRA Legacy* configurations. JIRA Legacy configuration is for legacy integrations that were created with earlier versions of Collaborator.

Title:	<input type="text" value="ACME JIRA"/>
Server URI:	<input type="text" value="https://acme.atlassian.net"/> A public URI of your JIRA server
JIRA user:	<input type="text" value="JIRA Integration Bot"/> A user name for connecting to JIRA server
API token:	<input type="text" value="●●●●●●●●"/> An API token for connecting to JIRA server
Project list:	<input type="text" value="ALM, SHUB, COLLAB, DEJA, SETUP, CC"/> A list of JIRA projects to integrate with. Use ',' as delimiter. Example: TEST, TEST1
<input type="button" value="TEST CONNECTION"/> <input type="button" value="LOAD PROJECTS"/> <input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

Specify the setting values:

Setting	Description
Title	The configuration name as it will be displayed in Collaborator's user interface.
Server URI	The JIRA server's URL and port. For instance: <i>https://jira.acme.com</i>
JIRA user	The user name that Collaborator will use for connecting to JIRA server. The specified user must have read-write permissions to JIRA projects. Administrator permissions are NOT required. You may specify a regular user, or create a dedicated user for this integration.
API token	The API token to use for connecting to JIRA server. To generate API token, log in to https://id.atlassian.com/manage/api-tokens , click Create API token , specify token caption and click Create . See Atlassian documentation for detailed information about API tokens.

After specifying these values, you can click **TEST CONNECTION** to verify if you entered data correctly.

Setting	Description
Project list	A string containing the keys of JIRA projects to integrate with. Tip: Click LOAD PROJECTS to read project keys from the JIRA instance specified by the <i>Server URI</i> setting. Project keys are case-insensitive. The "Project List" field can contain up to 2000 characters.

- After you specified the values, click **Save**. This will create and enable JIRA integration.
- Switch to the **Admin > Remote System Integrations** page. The **Integration Status** section allows you to quickly enable or disable integrations with remote systems.
- Locate the **Enable JIRA Integration** setting and verify that it is set to **Yes**.

7. Once the JIRA configuration is enabled, automatic linking for the specified remote systems will be enabled in all active templates. However, Collaborator administrators may enable or disable linking per each template through its [Automatically Add Remote System Links](#)^[234] setting. Besides that, administrators can enable the ability to export review defects to the selected issue-tracking system. To enable defect export, go to the [Review Templates](#)^[230] screen, edit the appropriate template, change the "[Automatically Create New Work Item for External Defects](#)^[234]" setting for that specific system field to "Enabled" and select which project will be pre-selected in the dialog that suggests creating a ticket/work item.

Remote System Links			
Enabled:	Yes		
	Automatically Add Remote System Links	Automatically Create New Work Item for External Defects	Default Project
ACME JIRA:	Enabled	Enabled	COLLAB
<input type="button" value="SAVE"/> <input type="button" value="REVERT"/>			

Now the integration between Collaborator and JIRA is configured and running.

8.2.2 Configuring TFS Work Item Integration

This topic describes how to setup Collaborator integration with TFS work item system. To learn general principles of how any issue-tracking integration operates, see [Issue-Tracking Integrations: Overview](#)^[778].

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
2. In Collaborator, go to **Admin > Remote System Integrations > Issue-Tracking Services**
3. In the **New Remote System Configuration** section, select *TFS* and click **Create**. This will display the configuration settings.

Edit "Tfs - TFS"	
Title:	TFS Team Services 1
TFS Collection URL:	https://jsmith-ts.visualstudio.com <small>Team Foundation Server collection URL (https://your-team-services-account-name.visualstudio.com)</small>
TFS User:	jsmith@acme.com <small>Team Foundation Server user name</small>
TFS Personal access token: <small>Team Foundation Server Personal access token</small>
<input type="button" value="TEST CONNECTION"/> <input type="button" value="SAVE"/> <input type="button" value="REVERT"/>	

4. Specify the setting values:

Remote system configuration settings depend on whether you use a self-hosted version or a SaaS version of Team Foundation Server known as Visual Studio Team Services. If you use the latter, then you might need to set-up alternate authentication credentials at first and then use those credentials in your TFS configuration. See [Client Configuration for Visual Studio Team Services](#) ⁶⁵⁶ for configuration instructions.

Setting	Description
Title	The configuration name as it will be displayed in Collaborator's user interface.
TFS Collection URL	<p>For self-hosted version of Team Foundation Server, specify the URL of Team Foundation Project Collection to work with.</p> <p>For instance: <i>http://tfs.acme.com/my-collection</i></p> <p>For SaaS version of Team Foundation Server, specify the URL of your Visual Studio Team Services account (without project or collection names).</p> <p>For instance: <i>http://jsmith-ts.visualstudio.com</i></p>
TFS User	<p>The name of Team Foundation user. For SaaS version of Team Foundation Server, specify either user name or alternate primary user name.</p> <p>The specified user must have read-write permissions to TFS projects. Administrator permissions are NOT required. You may specify a regular user, or create a dedicated user for this integration.</p>
TFS Personal access token	The personal access token of Team Foundation user. For SaaS version of Team Foundation Server, specify either personal access token or alternate credentials password.

After specifying these values, you can click **TEST CONNECTION** to verify if you entered data correctly.

6. After you specified the values, click **Save**. This will create and enable TFS integration.
7. Switch to the **Admin > Remote System Integrations** page. The **Integration Status** section allows you to quickly enable or disable integrations with remote systems.
8. Locate the **Enable TFS Integration** setting and verify that it is set to **Yes**.

Now the integration between Collaborator and TFS work items is configured and running.

8.3 General Approach to Issue-Tracking Integrations

Collaborator is flexible enough to integrate with any external issue-tracking system: JIRA, TeamTrack, Bugzilla, FogBugz and so forth. Integration can be done in several ways depending on the type of integration you require.

Hyperlinked Issues

Collaborator can identify external issue references in titles, custom fields, comments, defects, and more, and automatically hyperlink them to the right web page in your external issue tracker.

For example, if your company uses the word " Case" followed by a number to identify an issue in an issue-tracking system. You can configure Collaborator to search for text in the (regular expression) form of "\bcase\s*(\d+)" and automatically hyperlink the number part (in the grouping symbols) to your issue-tracker.

To learn how to setup automatic hyperlinks, see [this section](#)^[260] of administrator guide.

Referring to issues in the Review Overview

It is common to want to associate one or more issues with each review. The easiest way to do this is to create a [custom review field](#)^[236] and set the regular expression validator to ensure that only properly-formatted issues are entered in.

You should also set up the issue-hyperlink feature described above so that these fields are interactive.

Externalizing: Moving a defect from Collaborator to an external issue tracker

Sometimes you find a defect during review that you do not want to fix just now. In this case you want to move the defect from Collaborator into an external issue tracker. You also want to record this state and audit trail in the review.

The [externalized defects](#)^[396] feature allows you to do just that. See that section of the manual for details.

It is unusual to integrate beyond this point

This is the extent to which most of our customers go with integration. Most people do not want review defects mirrored into an external issue tracker because these defects were never "delivered".

For example, if you had done the peer review side-by-side with someone, you would not enter in defects then -- you would just fix them!

Usually the QA department runs off the issue tracker for verification. How can QA verify something that was not necessarily externally broken (for example, some function was not checking input values carefully) or something just in the file (for example, some method was not documented properly).

Mirroring defects from Collaborator into an external issue tracking system

You can use the [server-side trigger](#)¹⁹⁶ that runs every time a defect is added, edited, marked fixed, or deleted. Your trigger would locate the corresponding external issue record and update it. This integration takes a bit of work. We do not have it pre-built because everyone's external issue-tracking system is different.

For an example see this [scripting tutorial](#)⁸²⁷.

8.4 JIRA Legacy Integration

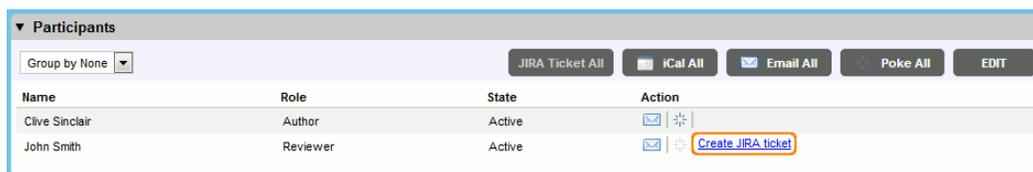
Collaborator provides support for JIRA, giving you the possibility to create Collaborator reviews from JIRA tickets' linked commits or use JIRA as notification channel.

Note: There are two types of remote system configurations designed to establish integration with JIRA. They are named JIRA and JIRA Legacy. JIRA integration allows you to associate issues with reviews and vice versa, hyperlink mentioned issues, move or mirror defects from Collaborator to your JIRA server. JIRA Legacy integration allows you to create Collaborator reviews from JIRA tickets' linked commits or use JIRA as notification channel. This type of integration was introduced in earlier versions of Collaborator and we recommend that you use "ordinary" JIRA integration instead.

How the Integration Works

The integration means that --

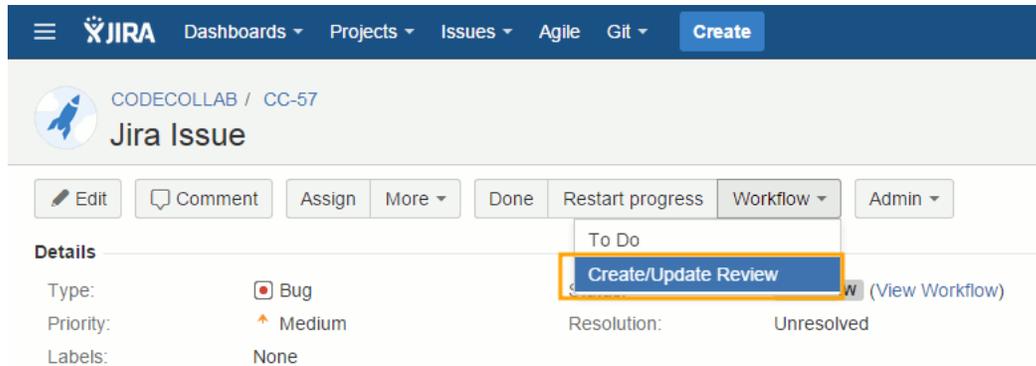
- You can create JIRA tickets directly from the Collaborator user interface:



Use this functionality to create a JIRA item for your colleagues to remind them to review documents.

For more information, see [Creating JIRA Tickets From Collaborator](#)⁷⁸⁸.

- You can create Collaborator's reviews from within the JIRA item screens --



(The items must have Git or Subversion commits attached via Atlassian FishEye.)

This feature significantly streamlines the review creation process.

For more information, see [Creating Collaborator Reviews From JIRA](#)⁷⁹⁰.

Requirements

Atlassian JIRA versions 5-7.

To use the integration features, you need to configure certain settings on your JIRA and Collaborator servers.

Additionally, to be able to create Collaborator's reviews from JIRA, you will need to install and configure Atlassian FishEye and install and configure the **Collaborator** plugin for JIRA.

For detailed information, see [Configuring JIRA and Collaborator Servers](#)⁷⁹¹.

8.4.1 Creating JIRA Tickets From Collaborator

When integration between JIRA and Collaborator is enabled and properly configured, you can create JIRA tickets/items directly from the Collaborator user interface.

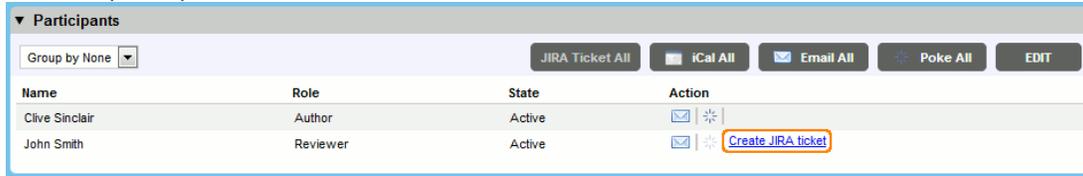
To create JIRA ticket, do the following:

1. Login to Collaborator Web Client
2. Open the desired review in the [Review Summary Screen](#)³¹⁶.
3. In the **General Information** section find the **JIRA project** field and select a JIRA project where you want to create the new item.
4. Scroll to the **Participants** section.

5. Click the **JIRA ticket All** button to make a ticket for all participants.

-- OR --

Click the **Create JIRA ticket** link next to the participant name to make a ticket for the selected participant.

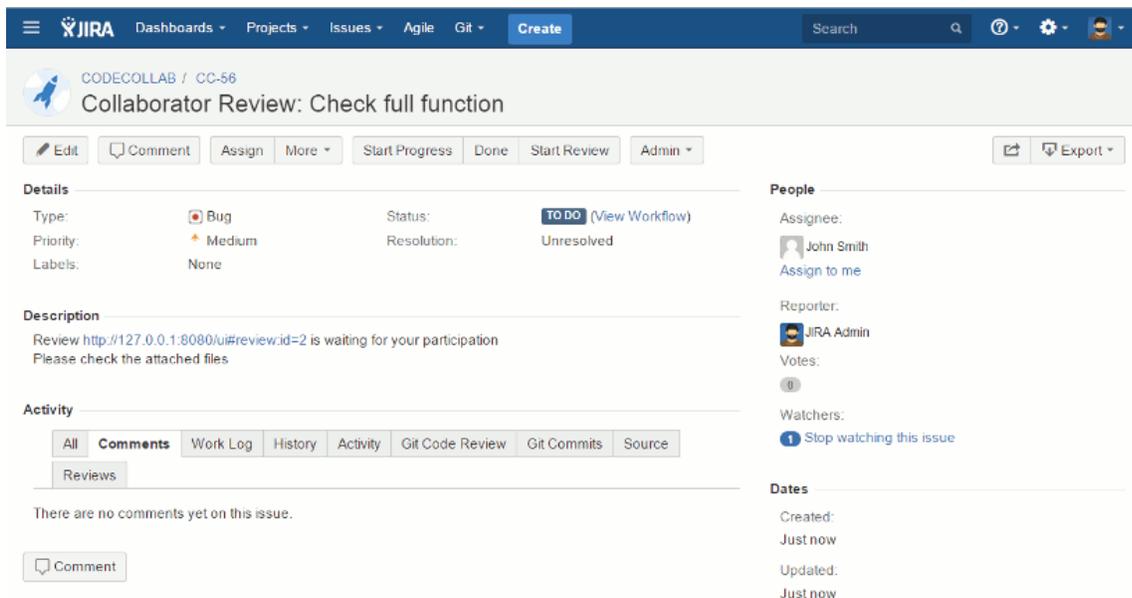


Collaborator will perform the following actions:

- Create a new item in the specified project,
- Fill-in item's Title and Description with the information from the review,
- Assign this item to a JIRA account [linked](#)³⁰² with the chosen participant,
- Add a link to the created JIRA ticket in the **Participants** section.



The newly created JIRA item will look like this:



Known Issues:

- Currently, Collaborator cannot populate values of arbitrary custom fields. If your JIRA server requires certain custom fields to be set during the creation of tickets/items, then Collaborator will be unable to create new tickets/items.

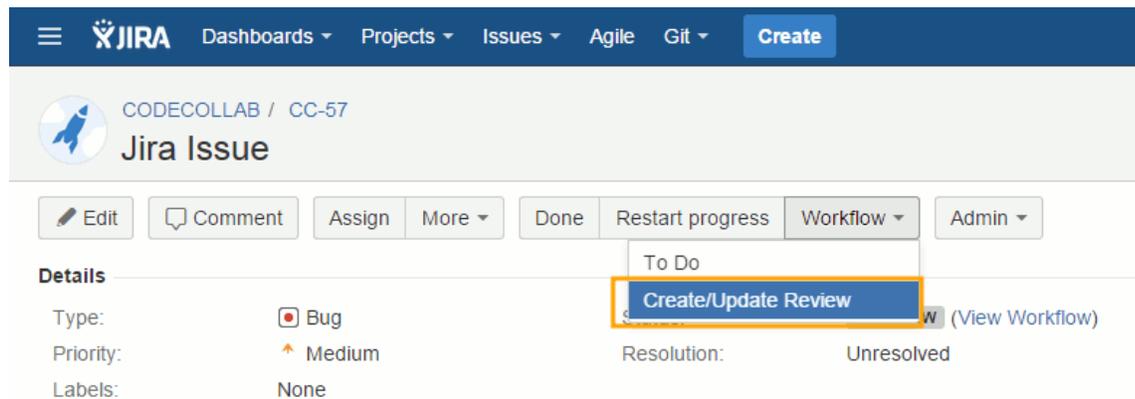
8.4.2 Creating Collaborator Reviews From JIRA

Once FishEye integration with JIRA is established, commits from the source code systems can be linked to JIRA tickets. This allows to quickly monitor what changes were made and with what ticket they are related. Collaborator integration with JIRA expands this duo and allows to unite commits from the source code systems, JIRA tickets and code reviews.

When integration between JIRA and Collaborator is enabled and properly configured, JIRA users gain ability to create Collaborator reviews from within the JIRA item screens.

To create a Collaborator review from JIRA item screen, do the following:

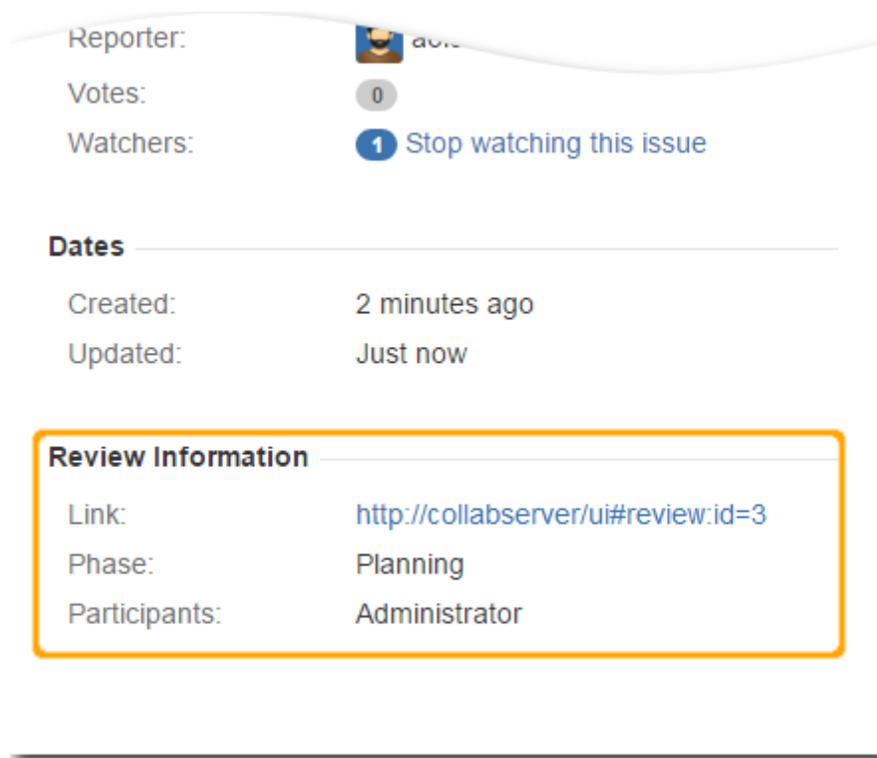
1. Open a JIRA item which has some Git or Subversion commits attached.
2. Press the Create/Update Review button (at the top-left of the 'view issue' page)



The screenshot shows the JIRA issue view page for 'CODECOLLAB / CC-57'. The page has a dark blue header with the JIRA logo and navigation menus for Dashboards, Projects, Issues, Agile, and Git. A 'Create' button is visible in the top right. Below the header, the issue title 'Jira Issue' is displayed. A toolbar contains buttons for Edit, Comment, Assign, More, Done, Restart progress, Workflow, and Admin. The 'Workflow' dropdown menu is open, showing 'To Do' and 'Create/Update Review' (highlighted with a yellow border). The 'Details' section shows the issue type as 'Bug', priority as 'Medium', and resolution as 'Unresolved'. The 'Labels' section shows 'None'.

This will create a new review in Collaborator. The new review gets a link to the original JIRA issue and the Review Materials section of new review contains the same commits that were linked to the original JIRA item.

Once the review is created, the JIRA item screens display new block named "Review Information".



This block displays the link to the associated review, its current phase and list of review participants.

Note for JIRA 7 users: Due to technical issues, JIRA 7 cannot display the "Review Information" block automatically. As a workaround you can manually make the Review Id, Review Participants, Review Phase and Review Link fields be visible on your JIRA screens.

8.4.3 Configuring JIRA and Collaborator Servers

This topic describes how to setup Collaborator legacy integration with JIRA issue-tracking system. This type of integration was introduced in earlier versions of Collaborator and we recommend that you use "ordinary" JIRA integration instead. To learn about new integration with JIRA issue tracking system, see [Issue-Tracking Integrations: Overview](#)^[778].

In order to enable legacy integration between JIRA and Collaborator, you need to prepare both JIRA and Collaborator servers.

Besides, in order to create Collaborator's reviews from JIRA, you will need to install and configure Atlassian FishEye and Collaborator Plugin for JIRA.

Preparing JIRA Server

1. [Install and Configure Atlassian FishEye](#)^[792] (Needed for creating Collaborator reviews from JIRA.)

2. [Install Collaborator Plugin for JIRA.](#)^[792] (Needed for creating Collaborator reviews from JIRA.)
3. [Configure Collaborator Plugin for JIRA.](#)^[794] (Needed for creating Collaborator reviews from JIRA.)
4. [Configure JIRA Fields.](#)^[798]

Preparing Collaborator Server

5. [Create JIRA Legacy Configuration and Enable the Integration.](#)^[801]
6. [Configure User Remote Accounts.](#)^[804]

8.4.3.1 1. Installing and Configuring FishEye

To be able to create Collaborator reviews from JIRA items, you will need to establish the integration between FishEye and JIRA. If this feature is not required, you may skip the steps of this section and proceed to [Configuring JIRA Fields](#)^[798].

What is FishEye?

Atlassian [FishEye](#) is a server tool that allows you to track changes in source control repositories. FishEye integrates with JIRA to allow users link commits in source controls with JIRA items.

Installing and Configuring FishEye

To enable the integration between FishEye and JIRA follow the steps below:

1. Install and start FishEye on your server. For detailed instructions how to do this, please see [Installing FishEye on Windows](#) and [Installing FishEye on Linux and Mac](#) in FishEye's documentation.
2. Specify which source control repositories FishEye should monitor. This must be a Git or a Subversion repository, as other source control systems are not yet supported by Collaborator Plugin. For detailed instructions how to do this, please see [Starting to use FishEye](#) and [Adding an external repository](#) in FishEye's documentation.

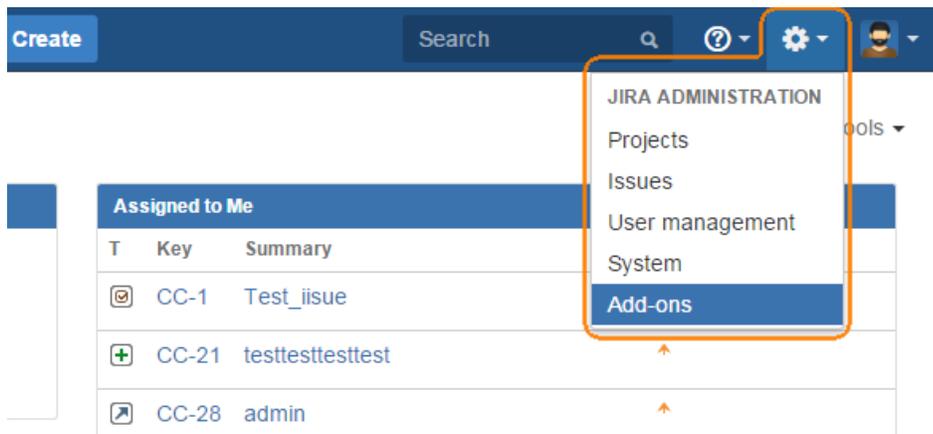
Ok, now we can [install the Collaborator Plugin for JIRA](#)^[792].

8.4.3.2 2. Installing the Collaborator Plugin for JIRA

To be able to create Collaborator reviews from JIRA items, you will need to install and configure special Collaborator plugin for JIRA. If this feature is not required, you may skip the steps of this section and proceed to [Configuring JIRA Fields](#)^[798].

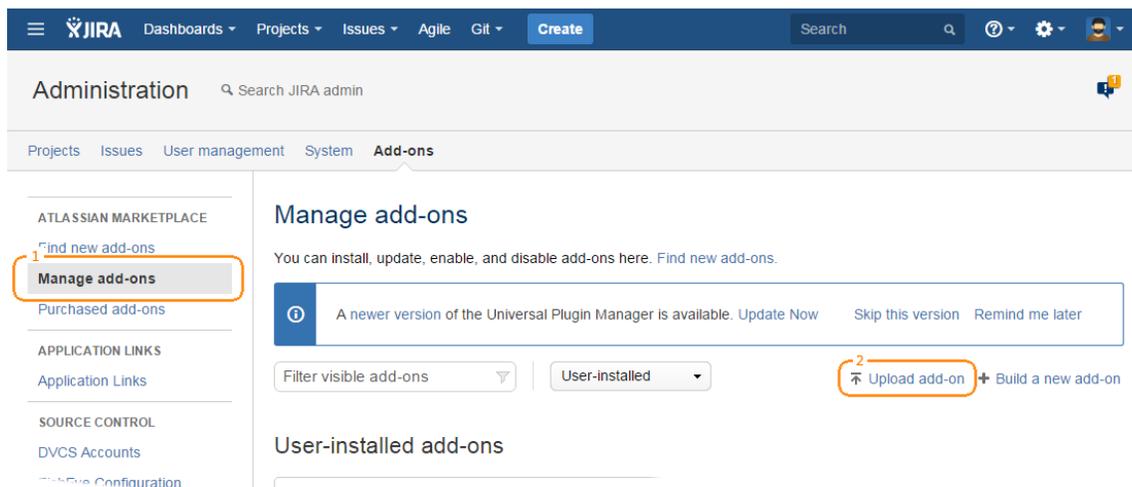
The Collaborator plugin for JIRA serves to exchange data between Collaborator and JIRA. Follow the steps below to install it:

1. Download the plugin from the SmartBear repository on GitHub: <https://github.com/SmartBear/jira-collaborator-plugin>. The **target** subfolder of this repository contains a compiled plugin: collab-jira-integration-N.N.N.jar.
2. Log in to your JIRA as an administrator (or a user with administrator permissions).
3. In JIRA, go to **JIRA Administration > Add-ons**:

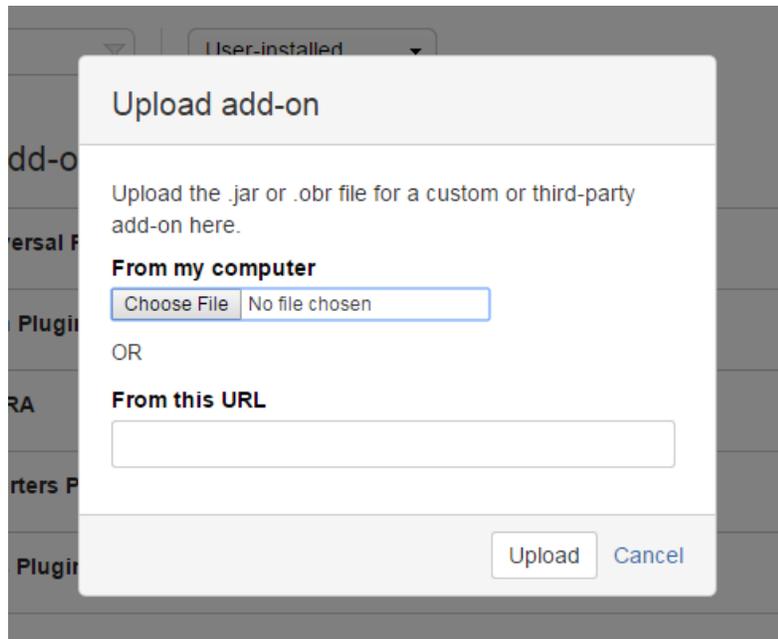


JIRA can ask you to enter the user name and password once again.

4. On the next screen, select **Manage Add-ons** on the left and then click **Upload add-on** on the right:



5. In the subsequent dialog box, specify the plugin's file name and click **Upload**:



The plugin will be installed in JIRA. You will see it at the end of the add-on list.

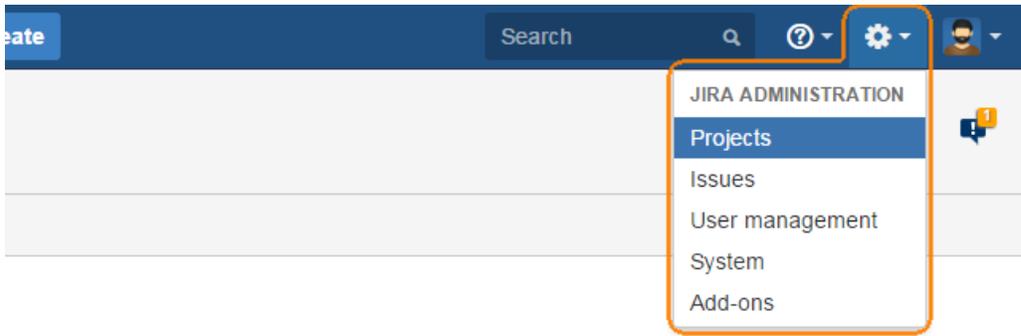
After installing the plugin, you need to [configure its settings](#)^[794].

8.4.3.3 3. Configuring the Collaborator Plugin for JIRA

To be able to create Collaborator reviews from JIRA items, you will need to configure the Collaborator plugin for JIRA. If this feature is not required, you may skip the steps of this section and proceed to [Configuring JIRA Fields](#)^[798].

After [installing](#)^[792] the Collaborator plugin in JIRA, you need to configure it. Follow these steps:

1. In JIRA, go to **JIRA Administration > Projects**:

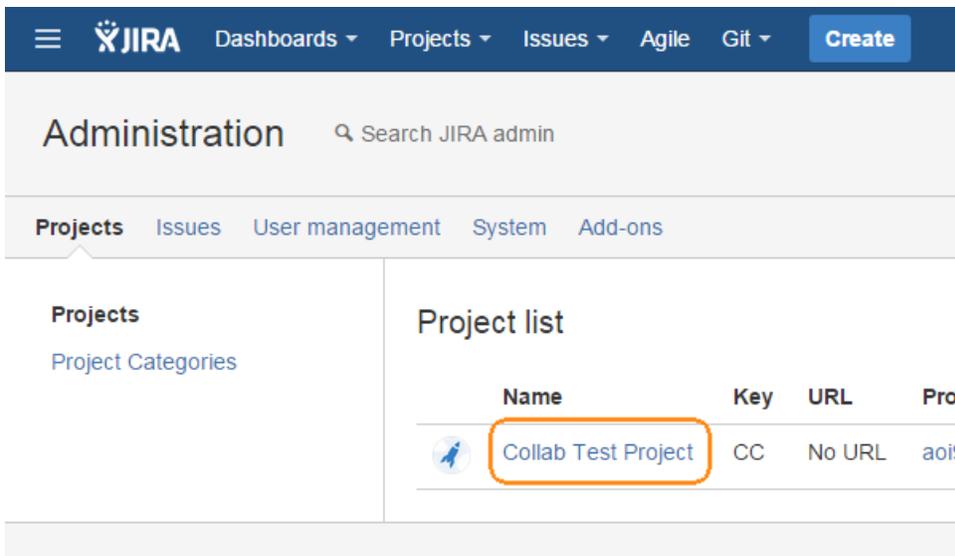


add-ons here. [Find new add-ons.](#)

Plugin Manager is available. [Update Now](#)

[Skip this version](#) [Remind me later](#)

2. Click your project in the list:



3. Scroll the subsequent screen down and click **Collaborator** at the bottom left:

The screenshot shows the Jira Administration interface. The left sidebar contains a 'Summary' section with a list of categories: Issue Types, Workflows, Screens, Fields, Versions, Components, Roles, Permissions, Issue Security, Notifications, HipChat integration, Development tools, Issue Collectors, and Collaborator. The 'Collaborator' item is highlighted with an orange border and an orange arrow points to it from the 'Development tools' category. The main content area is titled 'Administration' and is divided into three sections: 'Issue Types', 'Workflows', and 'Screens'. Each section includes a description, a scheme name, and a list of items with their respective icons.

Administration

Summary

- Issue Types
 - Bug
 - Improvement
 - New Feature
 - Sub-task
 - Task
- Workflows
- Screens
- Fields
- Versions
- Components
- Roles
- Permissions
- Issue Security
- Notifications
- HipChat integration
- Development tools
- Issue Collectors
- Collaborator**

Issue Types

Keep track of different types of issues, such as bugs or tasks. Each issue type can be configured differently.

Scheme:
EF: Software Development Issue Type Scheme

- Bug
- Improvement
- New Feature
- Task
- Sub-task **SUB-TASK**

Workflows

Issues can follow processes that mirror your team's practices. A workflow defines the sequence of steps that an issue will follow, e.g. "Progress", "Resolved".

Scheme:
EF: Software Development Workflow Scheme

[EF: Software Development Workflow](#) ✎

Screens

Screens allow you to arrange the fields to be displayed for an issue. Different screens can be used when an issue is created, viewed, edited, or transitioned through a workflow.

Scheme:
EF: Software Development Issue Type Screen Scheme

You will see the Collaborator plugin's settings:

The screenshot shows the JIRA Administration interface. On the left is a navigation menu with categories like Summary, Issue Types (New Feature, Sub-task, Task), Workflows, Screens, Fields, Versions, Components, Roles, Permissions, Issue Security, Notifications, HipChat, Issue Collectors, and Development tools. The main content area is titled 'Administration' and contains two sections: 'Collaborator Settings' and 'Fisheye Settings'.
Collaborator Settings:
 - Collaborator Url: (Example: http://localhost:8080)
 - Collaborator Username: (Must be a Collaborator Admin)
 - Collaborator Password:
 - Button: Test Collaborator Connection
Fisheye Settings:
 - Fisheye Url: (Example: http://localhost:8080)
 - Fisheye Username: (Must be a Fisheye Admin)
 - Fisheye Password:
 - Button: Test Fisheye Connection
 - Button: Save

4. Specify the settings' values:

Collaborator Settings

Setting	Description
Collaborator Url	The address and port of the Collaborator server.
Collaborator Username and Password	The user name and password that the plugin will use for connecting to the specified Collaborator server. Important: the user should have administrator permissions in Collaborator.

After specifying these values, you can click **Test Collaborator Connection** to verify if you entered data correctly.

FishEye Settings

The Collaborator plugin uses FishEye to get information on files to be included in a review, when you are creating a Collaborator's review from JIRA.

Setting	Description
FishEye Url	The address and port of the FishEye server.
FishEye Username	The name of the FishEye account that the plugin will use for monitoring source control commits. Important: the user should have administrator permissions in FishEye.
FishEye Password	The password for connecting to FishEye.

After specifying these values, you can click **Test FishEye Connection** to verify if you entered data correctly.

JIRA Settings

Setting	Description
Allow creating empty reviews	Enable if it should be possible to create reviews with no attached changelists.

5. After you specified the setting values, click **Save**.

Besides configuring the Collaborator plugin for JIRA, you also need to [configure the visibility of certain JIRA fields](#) ⁷⁹⁸.

8.4.3.4 4. Configuring JIRA Fields

To exchange data between Collaborator and JIRA, the Collaborator Plugin uses a number of JIRA fields.

To create JIRA tickets, the integration uses **Summary**, **Issue Type** and **Assignee** built-in fields. In order to create new tickets successfully, these built-in fields must be visible on JIRA screens that you use to create and update issues. These fields are visible by default.

To update information about current review status and list of review participants, the integration creates a number of custom fields - **Review Id**, **Review Link**, **Review Participants** and **Review Phase**.

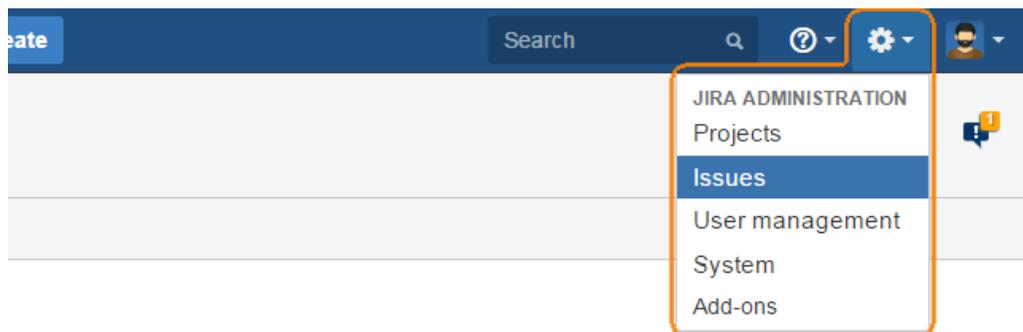
To be able to update the review status and participants, these custom fields must be visible on JIRA screens that you use to create and update issues. These fields are hidden by default.

Typically the "Default screen" is used both for creating and updating issues in JIRA, however this may vary depending on your JIRA configuration.

If some of required JIRA fields are hidden, Collaborator will display the "Field <name> cannot be set" error.

To configure the fields:

1. Log in to JIRA as an administrator.
2. Go to **JIRA Administration > Issues**:



add-ons here. [Find new add-ons.](#)

Plugin Manager is available. [Update Now](#)

[Skip this version](#) [Remind me later](#)

3. Select **Fields > Field Configurations** to open the View Field Configurations page, which lists all your field configurations.
4. Select the desired field configuration and click the **Configure** link.

Projects **Issues** User management System Add-ons

ISSUE TYPES
Issue Types
Issue Type Schemes
Sub-Tasks

WORKFLOWS
Workflows
Workflow Schemes

SCREENS
Screens
Screen Schemes
Issue Type Screen Schemes

FIELDS
Custom Fields
Field Configurations
Field Configuration Schemes

View Field Configurations

+ Add Field Configuration ?

The table below shows Field Configurations and the Field Configuration Schemes they are used in. A Field Configuration provides the ability to change field behavior, it essentially tells JIRA how to handle a particular field. For example, a Field Configuration can be used to hide a field from all input screens and views, or to make a field require a value every time it is edited.

Field Configurations are activated by placing them into Field Configuration Schemes, and then associating a scheme with one or more projects.

Name	Field Configuration Schemes	Operations
Default Field Configuration The default field configuration		2 Configure Copy

5. In the ensuing View Field Configuration page locate the following fields:

- **Summary**
- **Issue Type**
- **Assignee**
- **Review Id**
- **Review Link**
- **Review Participants**
- **Review Phase**

6. Make sure these fields are visible in current configuration. To display a field that is currently hidden, click **Show** link next to its name:

Review Id [Default Text Renderer] Review Id	<ul style="list-style-type: none"> • Default Screen • EF: Software Development Bug Screen • EF: Software Development Default Issue Screen • EF: Software Development Resolve Issue Screen • Resolve Issue Screen • Workflow Screen 	Edit · Hide · Required · Screens · Renderers
Review Link [Default Text Renderer] Review Link	<ul style="list-style-type: none"> • Default Screen • EF: Software Development Bug Screen • EF: Software Development Default Issue Screen • EF: Software Development Resolve Issue Screen • Resolve Issue Screen • Workflow Screen 	Edit · Hide · Required · Screens · Renderers
Review Participants [Default Text Renderer] Review Participants	<ul style="list-style-type: none"> • Default Screen • EF: Software Development Bug Screen • EF: Software Development Default Issue Screen • EF: Software Development Resolve Issue Screen • Resolve Issue Screen • Workflow Screen 	Edit · Hide · Required · Screens · Renderers
Review Phase [Default Text Renderer] Review Phase	<ul style="list-style-type: none"> • Default Screen • EF: Software Development Bug Screen • EF: Software Development Default Issue Screen • EF: Software Development Resolve Issue Screen • Resolve Issue Screen • Workflow Screen 	Edit · Hide · Required · Screens · Renderers
Security Level	<ul style="list-style-type: none"> • CCTEST: Simple Issue Tracking Create Issue Screen 	Edit · Hide · Required · Screens

You have prepared your JIRA server for integration with Collaborator. You will also need to change certain settings on the Collaborator server.

8.4.3.5 5. Creating JIRA Legacy Configuration and Enabling the Integration

1. Open the Collaborator login page in a browser and log in to Collaborator as an administrator.
 1. In Collaborator, go to **Admin > Remote System Integration**
 2. Switch to the **Configure Remote Systems** tab.
 3. In the **New Remote System Configuration** section, select *JIRA Legacy* and click **Create**. This will display the configuration settings.

Important: Do not confuse *JIRA* and *JIRA Legacy* configurations. *JIRA Legacy* configuration is for legacy integrations that were created with earlier versions of Collaborator.

Edit Jira Remote System

Title:	JIRA server 1
Server URI:	http://jira.mycompany.com:8181 JIRA public URI
Admin username:	admin JIRA administrator user name
Admin password:	••••• JIRA administrator password
Update review phase:	True <input type="checkbox"/> Whether to update review phase in jira issue
Update review participants:	True <input type="checkbox"/> Whether to update review participants in jira issue
Project List:	PROJECT1, PROJECT2, MOBILE_APP JIRA project list, use ',' as delimiter. Example: TEST, TEST1
Issue Type:	Bug JIRA issue type. Example: Bug, Story Task

2. Specify the setting values:

Setting	Description
Title	The configuration name as it will be displayed in Collaborator's user interface.
Server URI	The JIRA server's URL and port.
Admin username, and Admin password	The user name and password that Collaborator will use for connecting to JIRA. It is recommended that the specified user has administrator permissions in JIRA.

After specifying these values, you can click **TEST CONNECTION** to verify if you entered data correctly.

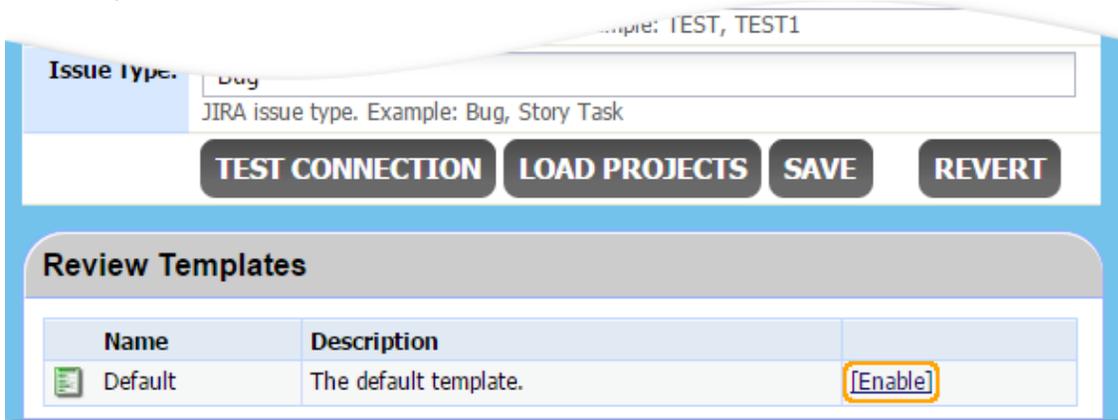
Setting	Description
---------	-------------

Update review phase	Specifies if the Collaborator plugin will automatically update the review status in JIRA items that are connected with that review.
Update review participants	Specifies if the Collaborator plugin will automatically update the list of review participants in JIRA items that are connected with that review.
Project List	<p>A string containing the keys of JIRA projects, to which Collaborator will add new items.</p> <p>This setting's value is used as a default value for the JIRA Project custom field (see below).</p> <p>If you are going to create items in several projects, enter several keys and separate them with commas.</p> <p>Tip: click LOAD PROJECTS to read project keys from the JIRA instance specified by the <i>Server URI</i> setting.</p> <p>Project keys are case-insensitive. The "Project List" field can contain up to 255 characters.</p>
Issue Type	<p>The type of the JIRA items to be created from Collaborator. You can specify one item type only.</p> <p>Important: This setting is case-sensitive. Specify the type exactly as it is written in JIRA settings.</p>

6. After you specified the values, click **Save**. This will create a JIRA configuration.
7. Scroll the **Admin > Remote System Integration** screen up to the **Integration Status** section. This section allows you to quickly enable or disable integrations with remote systems.
8. Locate the **Enable JIRA Legacy Integration** setting and change it to **Yes**.

9. Once the JIRA configuration is enabled, Collaborator automatically creates a new [review custom field](#) ^[236] named **JIRA Project** and displays the **Review Templates** panel. In this panel you need to specify which of the templates should display the **JIRA Project** field.

JIRA Project is a drop-down field which lists JIRA projects, to which Collaborator can add new items. Just after the creation, the JIRA Project field is hidden. To show this field in the desired template, just click the **Enable** link next to template name.



Now the integration between Collaborator and JIRA is configured and running. The last thing we need to do is to [link Collaborator user accounts with JIRA user accounts](#) ^[804].

8.4.3.6 6. Configuring User Remote Accounts

When you create a JIRA item from Collaborator, the latter should know the assignee user name in JIRA. Similarly, when you create a Collaborator review from JIRA, the Collaborator plugin should know your user name in Collaborator to specify the review participants correctly.

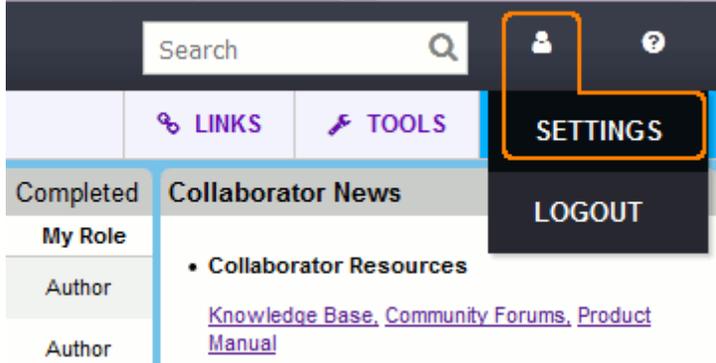
If the name of Collaborator user account **coincides** with the name of JIRA user account, then integration will link these two accounts automatically.

If the name of Collaborator user account **differs** from the name of JIRA user account, then this user **must** specify his/her JIRA account name in the [Remote Accounts](#) ^[302] section of [User Preferences](#) ^[291] of Collaborator.

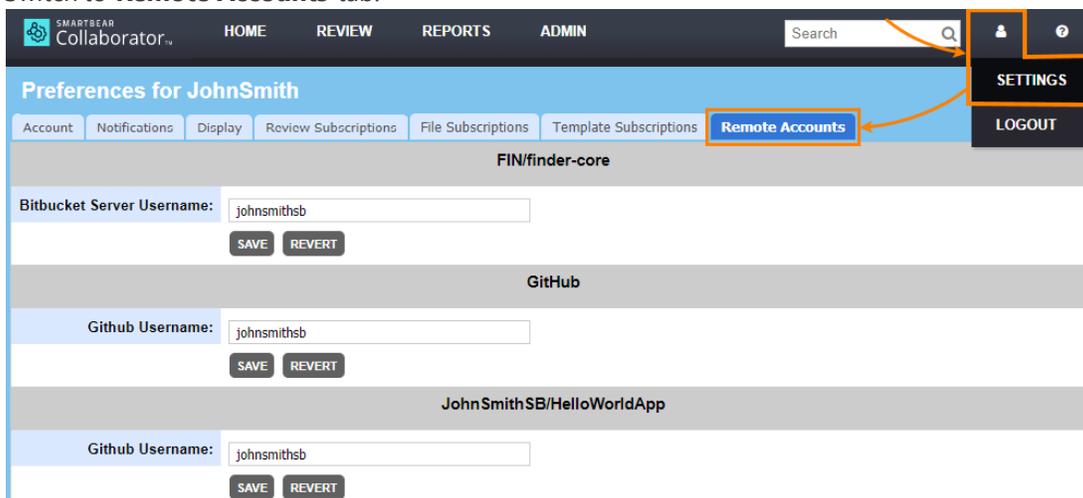
To do this:

1. Open the Collaborator login page in a browser, and log in to Collaborator

2. In Collaborator, go to **Settings**.



3. Switch to **Remote Accounts** tab.



4. Enter your JIRA account name into the **JIRA Username** field and press **Save**.

9 External Integrations

Integrating Collaborator into other systems, scripts, and processes is easy. A wide variety of integration mechanisms is available.

Reporting-writing tools⁸⁰⁷

Collaborator comes with a few built-in reports⁴⁰⁷, but almost everyone wants to make reports of their own.

You can use any external reporting system including Excel, Access, Crystal Reports, and Business Objects.

Scripting ⁸²⁵

Scripting is the way to implement custom behaviors in Collaborator. You can run scripts on your user's machines, or from the server machine, possibly invoked with a trigger. Almost any action you can do in the Web Client can be done from a script.

Web Services ⁸⁴²

Web services provide external programmatic interfaces to Collaborator server. You can use web services from different client applications to run various commands on a server. Web service runs on a server and waits for special kind of requests. Upon receiving a request the server processes it and sends the results in response. You can use JSON API services from various applications to interact with the Collaborator server.

9.1 Creating Custom Reports

Collaborator comes with a number of pre-built and customizable reports ⁴⁰⁷. However, if you would like to automate a report for integration with external tools or applications, or if you would like to create your own reports, you can access the underlying database directly.

(Note: SmartBear does not support querying Hypersonic ⁵⁹ databases. You will need to use one of the other databases ⁵⁹ supported by Collaborator.)

Creating Custom SQL Reports

In many cases, you may want report output slightly different than one of the existing customizable reports. In these cases, it may be simplest to begin with a report that outputs most of the data that you want, then modify its database query as needed.

1. Open a customizable report ⁴⁰⁷ that best matches the type of report you would like to create.
2. Choose the columns you wish to display in the report, and the criteria by which you would like to filter the results.
3. Click the "Save" button.
4. Verify that the first few results contain the data you expect.
5. Click the "SQL" link at the top-right of the Results pane. This will download a SQL query appropriate for your database which you can use as a starting point for your custom report.
6. Reference the Collaborator database schema ⁸⁰⁷ and documentation for your database's SQL dialect (MySQL, Oracle, or Microsoft SQL) to modify the query as you see fit.
7. Execute the query directly against the database using whatever SQL tool you like. Some tools that can run SQL queries include: Excel, Access, Crystal Reports, and Business Objects.

Custom XSL Reports

You can alternatively use the Command-Line Client to retrieve XML data regarding a review. For samples of this, see: [Example XPath and XSL](#)⁸²².

9.1.1 Database Schema

This section covers the Collaborator database schema and some special features of the database we created specifically to support external custom reporting applications.

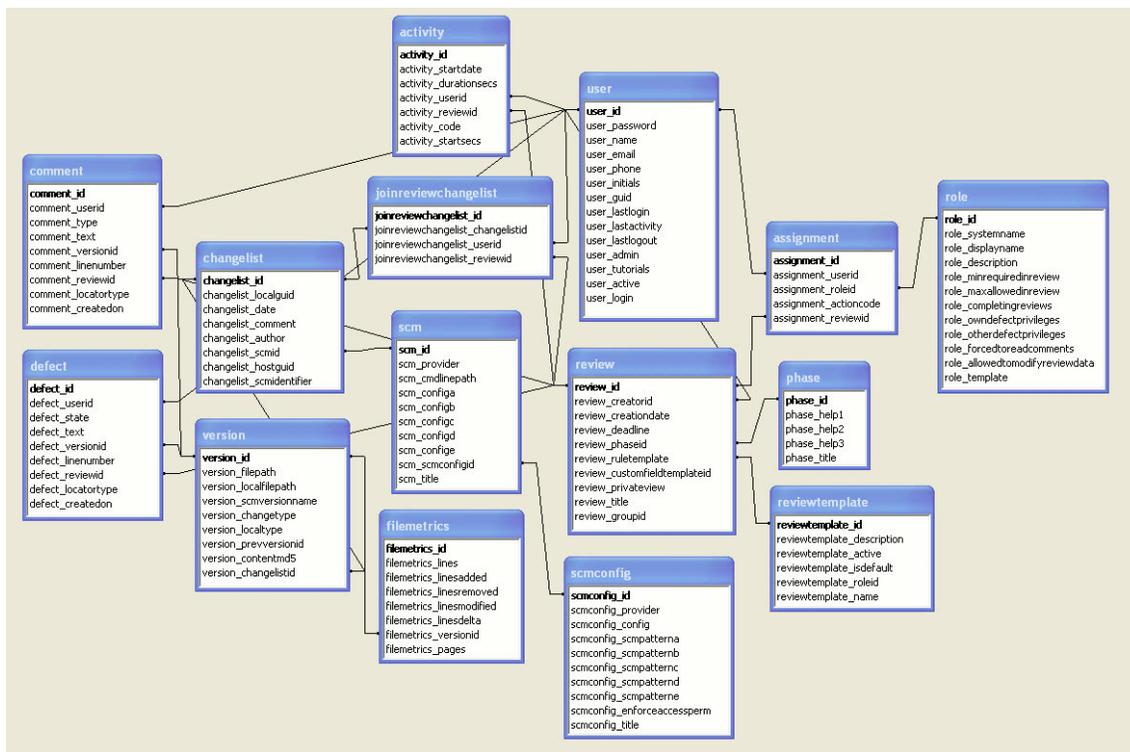
The Database is Read-Only!

Never change data in the database directly. Although we support read-only access to the database for reporting and automation, if you make changes to data in the database yourself **you could irreparably destroy the integrity of the database.**

Database Schema

The diagram below shows *only the major tables* in the Collaborator database and which files should be linked with which other fields when creating queries.

There are more tables which are either (a) purposefully undocumented or (b) described below but which do not have relationships to other tables. The diagram does not contain those tables in the interest of simplicity:



Database Schema

Warning: SmartBear reserves the right to change any of the table definitions whenever there is a minor point-release of the product.

Note: The table/view names above are approximations. In some cases, the names may be altered slightly (for example, vowels are removed).

We are committed to backwards-compatibility with the [reporting views](#) ^[812], and with our own [client software](#) ^[445].

Here is a brief description of each table:

activity	<p>Activity log of users' actions during review. This is used to compute metrics such as inspection rate.</p> <p>Each row represents a slice of time where the user was active. There might be many slices for a given user in a single review. Each slice includes a duration (in seconds) and a "start time" that is encoded both as a database date/time (activity_startdate) and as a number of seconds since 1970-01-01 00:00:00 GMT (activity_startsecs).</p>
-----------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>The activity action code (activity_code) tells whether the user was acting in the capacity of an author (A), reviewer (R), or was doing rework (F) as opposed to actually reviewing. Also there is a code for when someone views the review but is not a participant (P).</p> <p>It almost always best to use the reporting views⁸¹² to access activity data so you do not get your query wrong. The technique and motivation behind this system is described in our metrics section⁸⁶⁶.</p>
assignment	<p>List of user <--> review combinations. For each user who was "assigned" to a review, notes the role associated with that user.</p> <p>The assignment_actioncode field is used internally to understand what general status that user has in the review currently. <u>You should not depend on this field</u> as we might change it in the future. Refer to the assignment_state view for names and descriptions for these codes.</p>
changelist	<p>Every time a set of files is uploaded to the server a "changelist" record is created. Most changelists will be associated with a review through joinreviewchangelist, but some may not be for various reasons. Changelists are linked to version where the actual file content is represented.</p> <p>If the changelist is of files from a local hard drive, the "local GUID" field will contain a globally-unique made-up identifier for that upload. If the changelist was derived from something already checked into version control (for example, a Perforce or Subversion changelist), then this field will be blank.</p> <p>The date, author, and check-in comment are all listed if known. To the extent possible this will match usernames with version control.</p> <p>Also linked is the SCM table ID. This ties the changelist to a specific version control server. Changelists from different servers might match in other details but are actually unrelated.</p> <p>If the changelist happened to have an associated identifier in a version control system, that is also recorded. Otherwise that field is blank.</p>
comment	<p>Represents a comment made by a user in some conversation. This includes not only actual chat but indirect events such as "marked read" and "created defect" and "new file uploaded".</p> <p>Also included is the file (version) and line number the comment is associated with, however both of those fields are optional. They are linked to user ID and review ID as well.</p>
defect	<p>Represents a defect made by a user in some conversation.</p>

	<p>Also included is the file (<code>version</code>) and line number the defect is associated with, however both of those fields are optional. They are linked to user ID and review ID as well.</p> <p>A state field indicates whether the defect is still open or fixed. We will be adding more state to this field in the future.</p>
<code>filemetrics</code>	<p>Holds basic change metrics for file versions. Each <code>filemetrics</code> record is tied to one <code>version</code> record.</p> <p>You should only depend on the values of this table for versions directly associated with changelists. The other metrics are often incomplete. There are technical reasons for this; we will not be changing this behavior.</p>
<code>groupdescription</code>	<p>Represents a <code>group</code>^[212]. Some of the groups are defined in the web UI and some are built-in internal groups automatically defined by Collaborator</p>
<code>groupusers</code>	<p>Joins the <code>groupdescription</code> table with the <code>user</code> table to represent the users that are direct members of a group. A user can be a member of zero, one, or many groups.</p>
<code>groupgroups</code>	<p>Joins the <code>groupdescription</code> table with itself to represent the groups that are direct members of a group. A group can be a member of zero, one, or many groups.</p>
<code>groupancesstry</code>	<p><i>The behavior of this table is intentionally undocumented.</i></p>
<code>joinreviewchangelist</code>	<p>Joins reviews and changelists. A changelist can be associated with zero, one, or many reviews, and a review can be associated with zero, one, or many changelists.</p>
<code>metadatadescription</code> <code>metadatavaluecharacter</code> <code>metadatavaluedate</code> <code>metadatavalueinteger</code> <code>metadatavaluestring</code> <code>metadatavaluestringbig</code>	<p>All of these tables have to do with "meta-data" which means any data where the data schema itself is dynamic. Most notably, all review and defect <code>custom fields</code>^[235] are a kind of meta-data.</p> <p><u>You should not use the meta-data tables directly</u>. Their relationships are very complex and we change how they work regularly as we add more features.</p> <p>Instead, access meta-data through the reporting views described <u>below</u>^[812]. This contains all the information you need for custom fields and formats it nicely as an added bonus.</p>
<code>metadataselectitem</code>	<p>Information for all the drop-down items in any custom field.</p>

	<p>Each item is matched to a particular custom field. The "title" is the text displayed to end users. A "sequence" number defines the order of the elements (the IDs are not an order). Items can also be individually enabled or disabled.</p>
notification	<p>Holds the history of notification messages that have been sent out to clients. Clients might choose (or not) to get notifications by email, RSS feed, and so on.</p> <p>This table is periodically cleaned out by the server. There will always be some backlog of events for each user (for example, for use in creating the RSS feed for a user), but you cannot depend on any particular number of events to be saved.</p>
reportcategory reportfilter reporttemplate	<p><i>Internal server use. Do not depend on this table.</i></p>
review	<p>Holds one record for each review in the system.</p> <p>The "creator" is the user who created the review, or the system administrator if the review was created automatically.</p> <p>Use the review custom field view ^[812] to access review custom field data.</p>
reviewtemplate	<p><i>Internal server use. Do not depend on this table.</i></p>
role	<p>Represents all of the roles from all role-sets. Each role has a "standard" name that never changes and the custom name that was set by the user.</p>
scm	<p>Contains one record for each SCM server that has ever been reported by a client. It is OK if there are duplicate records for a given SCM system. This separates changelists from different systems. This table will probably change in the future.</p>
user	<p>One record for each user who can log into the system. User ID 1 is the special system administrator.</p> <p>Key user information and preferences are stored here. Additional user preference information is stored as meta-data and is accessible from the special <code>userprefs</code> view.</p> <p>The <code>user_initials</code> field is deprecated and should be ignored.</p> <p>Passwords are stored in hashed form so that a casual observer cannot deduce a password. If you need to reset a password, set this field to:</p>

	d41d8cd98f00b204e9800998ecf8427e
version	<p>One record for every version of every file that has ever been uploaded to the server. Join with <code>changelist</code> to see the group they were uploaded with.</p> <p>Each version includes the full file path to the original document. If this file was retrieved from version control, this will be the version control server path, not the path on the user's local hard drive.</p> <p>The version name is the version control-specific name of the version of the file. This is typically a number or set of numbers.</p> <p>The version change-type indicates whether this represents a file addition, deletion, modification, and so on. Sometimes the system does not know. You should use this as a guide but not depend on it because there are exceptions to the "type" rules and we add new types periodically. The current values are:</p> <ul style="list-style-type: none"> ? - Unknown A - Added B - Branched D - Deleted I - Integrated M - Modified R - Reverted U - Uploaded <p>Sometimes the version will have a "previous" version. This typically means the version that came before it in version control. This is used internally and is tricky; there are lots of exceptions and we can change exactly what this means.</p> <p>The content MD5 is the MD5 sum of the raw content of the file. This can be used to link a version with the on-disk file content stored in the content cache. It can also be used as a check to see whether two versions are identical.</p>

Reporting Views

For databases that support the concept of a "View," Collaborator creates a set of Views specifically for the purpose of external report-writers. You should use these Views whenever possible; we will make sure that the definitions of these Views remain the same even if we change the database schema in future versions.

You can also use these Views as a guide for how to create other custom queries.

Here are the special reporting Views:

assignment_view	Contains columns from the assignment table which will be maintained in the event of a future schema change.
-----------------	-------------------------------------------------------------------------------------------------------------

assignment_state	Contains names and descriptions for the codes used in the <code>actioncode</code> column of the <code>assignment</code> table.
defects_by_path	One row per review reporting file path, lines of code reviewed, and number of defects.
defectcustom	<p>These are the custom fields you have defined for defects, one row for each defect. If you change the custom field definition, the layout of this table will change as well (automatically, and immediately). Warning: Because the exact custom field titles are used for column names, if you change the title of a custom field it will change the definition of this view.</p> <p>With review workflows^[230], each review might have a different subset of custom fields. In this case fields are <code>NULL</code> when they are not applicable.</p>
defectcustom_compat	Same as <code>defectcustom</code> , but column names are in the form <code>custom_id_N</code> where "N" is the custom field ID as displayed in the custom fields admin page ^[235] . The columns are ordered exactly the same as <code>defectcustom</code> , so you can also tell which is which by comparing the two views.
defect_custom_dropdowns	This table contains a list of the possible values as defined in drop-down and multi-select Defect Custom Fields.
defect_state	Contains "defect state" codes and names. Join on this table if you would like to display more user-friendly defect state names.
defect_view	Contains columns from the defect table which will be maintained in the event of a future schema change.
participant_singleline_values	Shows Participant Custom Field values that users have selected in reviews. This table only shows values for "Single-Line Text" type custom fields. A <code>NULL</code> value means that a custom field was defined for a review's template, but the user did not specify a value.
participant_multiline_values	Shows Participant Custom Field values that users have selected in reviews. This table only shows values for "Multi-Line Text" type custom fields. A <code>NULL</code> value means that a custom field was defined for a review's template, but the user did not specify a value.

participant_select_values	Shows Participant Custom Field values that users have selected in reviews. This table shows values for "Drop-Down" and "Multi-Select" type custom fields. A NULL value means that a custom field was defined for a review's template, but the user did not specify a value. In the case of Multi-Select fields, if a user selected multiple values then multiple rows will appear in the results, one for each selection.
phase	Represents the various phases a review can be in.
review_activity	<p>For each unique combination of review, user, and role, reports the person-hours^[867] spent.</p> <p>This includes data for current review participants only. If a user was a participant but is not now, that person will not be included in this result. However that time will be included in the review_activity_summary view.</p>
review_activity_summary	<p>One row per review reporting author, reviewer, rework hours, and total person-hours^[867] spent in the review.</p> <ul style="list-style-type: none"> total_person_hours -- a total of all time spent in the review author_rework_hours -- time spent by the author during the "rework" phase. author_hours -- time spent by the author outside of the rework phase. reviewer_hours -- total time spent by reviewers. (active & passive) active_reviewer_hours -- time spent by "active" reviewers (that is, reviewers required to finish a review.) passive_reviewer_hours -- time spent by "passive" reviewers (that is, those not required to finish a review.)
review_comment_summary	One row per review reporting author, reviewer, and total number of comments made in the review.
review_defect_summary	One row per review reporting the number of defects created in that review.
review_metrics_summary	One row per review reporting a variety of standard metrics such as inspection rate, defect rate, defect density, and the individual numbers used to form those ratios. Some values will contain NULL values because of divide-by-zero errors.

review_version_list	Lists all versions actually associated with a review, although with the associated review.
review_version_summary	One row per review reporting the number of files and line metrics ^[866] (total, added, modified, removed) for all files in the review.
reviewcustom	<p>These are the custom fields you have defined for reviews, one row for each review. If you change the custom field definition, the layout of this table will change as well (automatically, and immediately).</p> <p>With review workflows^[230], each review might have a different subset of custom fields. In this case fields are NULL when they are not applicable.</p>
reviewcustom_compat	Same as <code>reviewcustom</code> , but column names are in the form <code>custom_id_N</code> where "N" is the custom field ID as displayed in the custom fields admin page ^[235] . The columns are ordered exactly the same as <code>reviewcustom</code> , so you can also tell which is which by comparing the two views.
review_custom_dropdowns	This table contains a list of the possible values as defined in drop-down and multi-select Review Custom Fields.
review_view	Contains columns from the review table which will be maintained in the event of a future schema change.
role_view	Contains columns from the role table which will be maintained in the event of a future schema change.
userprefs	Additional user preferences, one row per user. Most user information and preferences are stored in the <code>user</code> table; the rest is here.
userprefs_compat	Same as <code>userprefs</code> , but column names are in the form <code>custom_id_N</code> where "N" is an internal ID used to store user preferences. The columns are ordered exactly the same as <code>userprefs</code> , so you can tell which is which by comparing the two views.
user_view	Contains columns from the user table which will be maintained in the event of a future schema change.

9.1.2 Example SQL: Participant Custom Fields

What Are Participant Custom Fields?

In Collaborator, we introduced Per-Participant [Custom Fields](#)^[235]. This allows you to create a field in a review (via its review template) to which each review participant can assign his or her own value. This allows collection of any type of data that may be different for each participant.

Representing this data in table/column style is sometimes less than useful, especially since, generally, you will want to perform some calculation on the data before displaying it. To aid you in this, we have created views in the database to help you retrieve these values and perform calculations on them.

Examples in MySQL

Below is a sample of how to query Participant Custom Fields in [MySQL](#)^[60], using MySQL Workbench to connect directly to the database. The syntax will be similar for Oracle and MSSQL, though you may need to reference the documentation for your particular database. You will also need to use a SQL query tool that is able to connect to those databases.

Participant Custom Fields

In these examples, we will use the following Participant Custom Fields:

CUSTOM FIELD: Rating  Move Up  Move Down  Delete

ID:	138
Type:	Drop-down List
Title:	<input type="text" value="Rating"/>
Description:	<input type="text" value="Rate this review: 1-5 stars"/>
Visible Phase:	<input type="text" value="Any"/> 
Selectable Items:	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/> <input type="text" value="5"/>
Default Value:	<input type="text"/>

CUSTOM FIELD: Outside Time

 Move Up
 Move Down
 Delete

ID:	139
Type:	String (Single-line)
Title:	<input type="text" value="Outside Time"/>
Description:	<input style="width: 90%;" type="text" value="How much time did you spend on this review outside of Collaborator? (in minutes)"/>
Visible Phase:	<input type="text" value="Any"/> ▼
Default Value:	<input type="text"/>
Minimum Length:	<input type="text" value="0"/>
Maximum Length:	<input type="text" value="255"/> <small>Max: 255</small>
Validator:	<input style="width: 80%;" type="text" value="\d+"/> <small>A Java-style regular expression that validates the content of the field. Examples: - Positive integers: <code>\d+</code> - Any integer: <code>-?\d+</code> - American phone number: <code>\d\d\d-\d\d\d-\d\d\d\d</code> - Bug Number of two letters followed by at least five digits: <code>[a-zA-Z]{2}\d{5,}</code></small>

We will also use a review (#3919) with some sample data entered for the custom fields:

Participants Edit			
Moderator	Author	Reviewer	Observer
None	Cody Casterline (CC) [Poke]	Bob Smith (BS) [Poke] Sue Green (SG) [Poke]	None

Participant Custom Fields Edit			
	CC	BS	SG
Rating:	5	2	
Outside Time:	27	45	0

Simple Data

The simplest method of selecting the data from the database is just to show the values as they were entered by users. To do this, we will use one of the [views](#)⁸⁰⁷ for Participant Custom Fields that have been defined in the database.

```
SELECT *
FROM participant_singleline_values
WHERE reviewId IN (3919, 3918);
```

The screenshot shows a SQL query editor window titled "SQL Query* x". The query is:

```
1 SELECT *
2 FROM participant_singleline_values
3 WHERE reviewId IN (3919, 3918);
```

Below the query editor, there is a tab labeled "Result (1) x" showing the output of the query. The output is a table with 4 records. The table has columns: #, reviewId, fieldName, userId, and value. The data is as follows:

#	reviewId	fieldName	userId	value
1	3918	Outside Time	70	NULL
2	3919	Outside Time	70	27
3	3919	Outside Time	71	45
4	3919	Outside Time	72	NULL

Note that, for the purposes of these examples, we are limiting the results to two reviews.

Review #3918 only has one participant (it is still in planing phase), who has not yet specified a value for Outside Time.

Review #3919 has three users, two of which have specified values for Outside Time.

A Note About Database Data Types

Collaborator stores all values for Custom Fields as strings, or sequences of letters and numbers. This is fine for the purposes of displaying the data (as above), but if you want to perform calculations on the data, you will need to tell your database to convert the strings into a meaningful number type, such as an integer, or a floating point number.

In MySQL, you perform this data conversion using the [CONVERT\(\)](#) function.

SQL also contains a 'NULL' value, which represents the absence of a specified value. If you want to replace NULL values with some meaningful default value, use the [IFNULL\(\)](#) function. Generally, aggregate functions like SUM() and AVG() will exclude NULL values from their calculations, so you will not need this function.

Sums

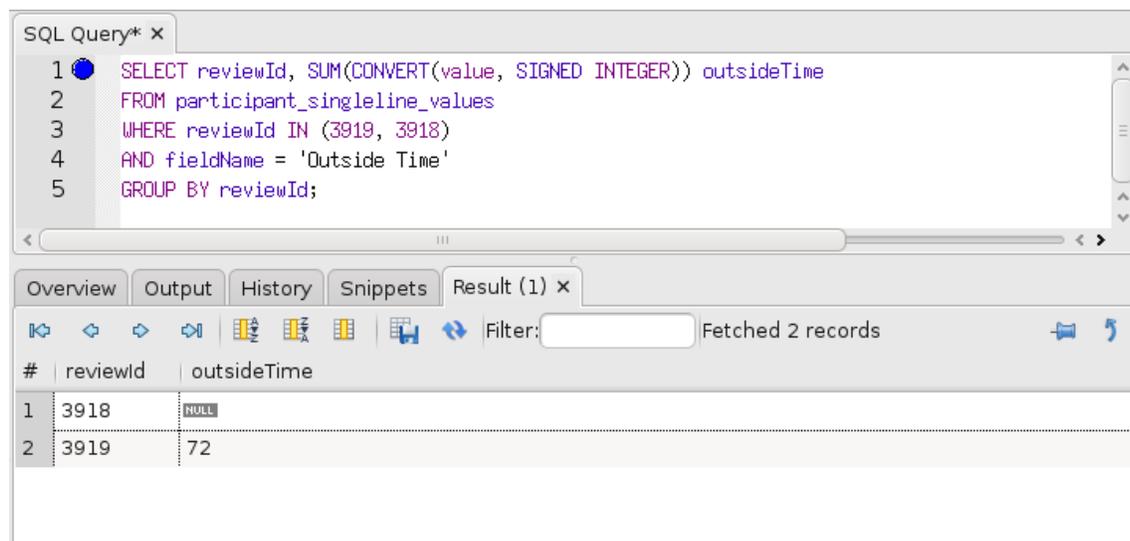
If we would like to find the sum of Outside Time for each review, we can modify the query to be:

```
SELECT reviewId, SUM(CONVERT(value, SIGNED INTEGER)) outsideTime
FROM participant_singleline_values
WHERE reviewId IN (3919, 3918)
AND fieldName = 'Outside Time'
GROUP BY reviewId;
```

In the SELECT line, we now explicitly list each of the columns we wish to select. We use the CONVERT() function to convert the values to (signed) integers, and then the SUM() function to add them up. We also specify that the summed value should be named "outsideTime".

In the WHERE clause, we have added an additional 'AND' clause. This makes sure that we only sum up values of the correct field type: 'Outside Time'.

Because we are using an aggregate function (SUM()), we have to specify which pieces of data we want to perform that calculation on. In this case, we want the sum for each review, so we specify "GROUP BY reviewId". The database server first groups all results with the same review ID together, then sums the values for each of those groups.



The screenshot shows a SQL query editor window titled "SQL Query* x". The query is as follows:

```
1 SELECT reviewId, SUM(CONVERT(value, SIGNED INTEGER)) outsideTime
2 FROM participant_singleline_values
3 WHERE reviewId IN (3919, 3918)
4 AND fieldName = 'Outside Time'
5 GROUP BY reviewId;
```

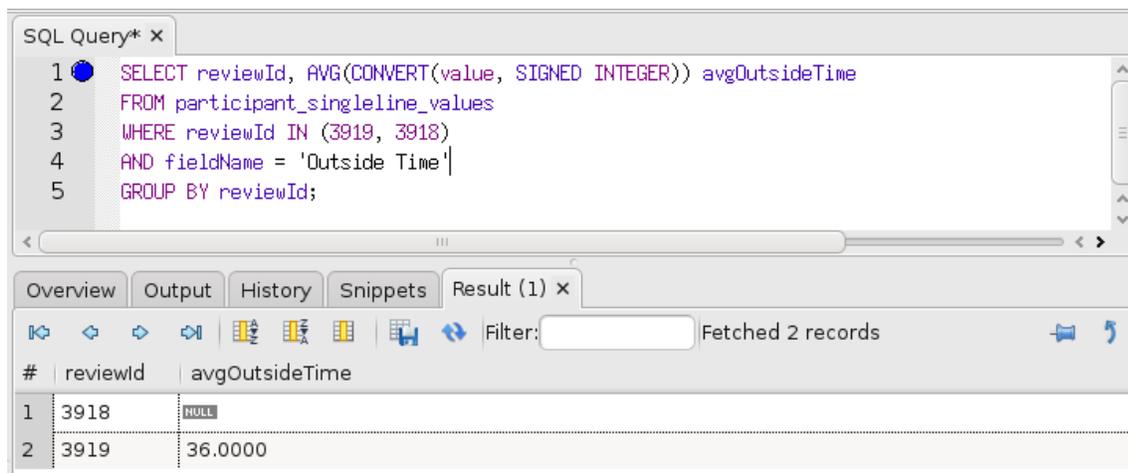
Below the query editor, there is a results pane with tabs for "Overview", "Output", "History", "Snippets", and "Result (1) x". The "Result (1) x" tab is active, showing a table with 2 records. The table has columns for "#", "reviewId", and "outsideTime".

#	reviewId	outsideTime
1	3918	NULL
2	3919	72

Averages

To perform averages, the query is nearly identical, we just replace the SUM() function with the average function, AVG():

```
SELECT reviewId, AVG(CONVERT(value, SIGNED INTEGER)) avgOutsideTime
FROM participant_singleline_values
WHERE reviewId IN (3919, 3918)
AND fieldName = 'Outside Time'
GROUP BY reviewId;
```



The screenshot shows a SQL query editor with the following query:

```
1 SELECT reviewId, AVG(CONVERT(value, SIGNED INTEGER)) avgOutsideTime
2 FROM participant_singleline_values
3 WHERE reviewId IN (3919, 3918)
4 AND fieldName = 'Outside Time'
5 GROUP BY reviewId;
```

The results pane shows the following data:

#	reviewId	avgOutsideTime
1	3918	NULL
2	3919	36.0000

Note that these may or may not be the results you were expecting, depending on how you wish to treat NULL values. In the above results, NULL values have been excluded from the calculation of the average, so what we are really seeing is the average of 27 and 45. If you instead want to treat NULL values as if they were 0, you need to specify that in your query using the IFNULL() function. IFNULL(x,y) says that if x is NULL, return y. (Otherwise, it just returns x.) So we will modify our query like this to treat NULLs as if they were 0:

```
SELECT reviewId, AVG(IFNULL(CONVERT(value, SIGNED INTEGER),0))
avgOutsideTime
FROM participant_singleline_values
WHERE reviewId IN (3919, 3918)
AND fieldName = 'Outside Time'
GROUP BY reviewId;
```

The screenshot shows a SQL query editor window with the following query:

```

1 SELECT reviewId, AVG(IFNULL(CONVERT(value, SIGNED INTEGER),0)) avgOutsideTime
2 FROM participant_singleline_values
3 WHERE reviewId IN (3919, 3918)
4 AND fieldName = 'Outside Time'
5 GROUP BY reviewId;

```

Below the query editor, the results are displayed in a table with the following data:

#	reviewId	avgOutsideTime
1	3918	0.0000
2	3919	24.0000

Note that, now that we treat missing (NULL) values as zeros, the average Outside Time for Review #3919 is the average of 27, 45, and 0. Also note that the missing values for Review #3918 are also interpreted as zeros, so we get a 0 result instead of a NULL.

9.1.3 Example XPath and XSL

If you feel more comfortable handling XML conversions than connecting directly to a database, you can instead get data about reviews using the command `ccollab admin review-xml`. This command has one required argument, the review ID. By default, it will output the entire XML document for the review. However, there are optional arguments of `--xpath` and `--xsl-file` which allow you to query the resulting document for particular information.

XPath

[XPath](#) allows you to address XML elements in an XML document much like paths in a file system. The hierarchy in an XPath expression tells the XPath parser where in the XML document to find elements.

For example, to get the section of the `review-xml` document that contains participant custom fields, you would use an XPath expression like this:

```
/reviews/review/participant-custom-fields
```

Below is an example command invocation and its response:

```
$ ccollab admin review-xml 3919 --xpath /reviews/review/participant-
custom-fields
```

```
<participant-custom-fields>
  <user userId="70">
    <outside-time metaDataId="198" title="Outside Time">27</outside-
time>
    <affected-components metaDataId="199" title="Affected
Components">APIs
Business Logic
Database Back-end</affected-components>
    <rating metaDataId="197" title="Rating">5</rating>
  </user>
  <user userId="71">
    <outside-time metaDataId="198" title="Outside Time">45</outside-
time>
    <affected-components metaDataId="199" title="Affected Components"/>
    <rating metaDataId="197" title="Rating">2</rating>
  </user>
  <user userId="72">
    <outside-time metaDataId="198" title="Outside Time">0</outside-time>
    <affected-components metaDataId="199" title="Affected Components"/>
    <rating metaDataId="197" title="Rating"/>
  </user>
</participant-custom-fields>
```

Finding Particular Values

To get all values of a particular type, you will need to specify a few more path elements. Note in the sample above that all of the Participant Custom Fields are grouped by the user that specified them. Within that user tag, each of the fields gets a unique XML tag which is a normalized form of the title of the custom field title. The value for that field is stored as text inside of that field's tag. So, to get the values for the Rating field, you would use the following XPath expression:

```
/reviews/review/participant-custom-fields/user/rating/text()
```

Below is an example invocation, and its output:

```
ccollab admin review-xml 3919 --xpath "/reviews/review/participant-
custm-fields/user/rating/text()"

5
2
```

Note that we had to quote the XPath expression because some command-line shells interpret parentheses as non-literal characters.

XSLT

XSLT (Extensible Stylesheet Language Transformation) is a subset of XSL which can be used to transform an XML document into another format. You can use XPath expressions along with XSLT to perform more complicated data queries. For example, if we want to show all "rating" values and the user ID of the user who set them, we can use a file like this:

File: sample.xslt

```
<?xml version="1.0" encoding="iso-8859-1"?>
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/
Transform">
<xsl:output method="text"/>
<xsl:template match="/">
  <!-- Output CSV of Participant Custom Fields -->

  <!-- Header: -->
  <xsl:text>UserID</xsl:text>
  <xsl:text>, </xsl:text>
  <xsl:text>Field Name</xsl:text>
  <xsl:text>, </xsl:text>
  <xsl:text>Field Value</xsl:text>
  <xsl:text>&#10;</xsl:text><!-- linefeed -->

  <xsl:for-each select="/reviews/review/participant-custom-fields/
user">
```

```

<xsl:value-of select="@userId"/>
<xsl:text>, </xsl:text>
<xsl:value-of select="rating/@title"/>
<xsl:text>, </xsl:text>
<xsl:value-of select="rating/text()"/>
<xsl:text>&#10;</xsl:text>
</xsl:for-each>

</xsl:template>
</xsl:stylesheet>

```

Here is how you would use the above XSL file, and some sample results:

```
$ ccollab admin review-xml 3919 --xsl-file sample.xslt
```

```

UserID, Field Name, Field Value
70, Rating, 5
71, Rating, 2
72, Rating,

```

Note that user #72 has not specified a value for Rating, so that value is empty.

9.2 Scripting

Scripting is the easiest way to implement custom behaviors with Collaborator.

Command-Line Client

You can use the Command-Line Client to script actions on your user's machines, or install it on the same machine as the Collaborator Server and invoke it with a [trigger](#)^[196].

The Command-Line Client can create, delete, and edit reviews, including templates and review custom fields. It can assign or remove participants within a review, and even move reviews to the next phase (for example, from "planning" to "inspection"). It can also create comments and defects, including defect custom fields, and mark defects as external.

You can use the Command-Line Client to create, edit, enable or disable user accounts. It can be used to set up user information like email addresses and phone numbers. It can also be used to set up author or file-based subscriptions.

Batching Commands

Often when scripting you find that you need to run multiple Command-Line Client commands. It is OK to simply run them one after the other in your script, but it is more efficient to group them together using the `ccollab admin batch` command. The `batch` command takes as input an XML file which lists the commands to be run and optionally global options to use to run them.

It is faster to run multiple commands using the `batch` command because the Command-Line Client only has to connect and authenticate with the Collaborator Server once. Also the [XML input format](#) is useful if the data you are passing to the Command-Line Client contains characters difficult to encode on the command-line like line feeds, quotes, or multi-byte characters.

Extracting Data

The `ccollab admin review-xml` command lets you extract data from one or more reviews in your script. You can supply an XSL file to format the output, or an XPATH expression to select only the specific data you need. You can even use XPATH functions to perform some computation.

You can also query the server for a list of reviews using the [built-in reports](#)^[407], and then use the `ccollab admin wget` command to download the [CSV output format](#)^[412] to be parsed by your script. Note the CSV output format of the reports does not consume a license. For example, to get a list of the reviews currently in progress run:

```
ccollab admin wget "/go?
page=ReportReviewList&formSubmittedreportConfig=1&reviewIdVis=y&reviewTitleVis=y&data-format=csv&phaseFilter=inprogress"
```

Prompting

You can disable all interactive prompting by specifying the [non-interactive](#)^[455] global option.

If [non-interactive](#)^[455] is not specified, the Command-Line Client will automatically prompt for server [url](#)^[456], [user](#)^[456], and [password](#)^[455] as necessary when it connects to the Collaborator Server.

You can also use the special value "ask" when specifying the `review` parameter. Using "ask" will cause the Command-Line Client to interactively prompt the user with the list of reviews they are currently involved in.

If you are invoking more than one command, you can use the special value "last" in combination with "ask". Using "last" will cause the Command-Line Client to address the review most recently accessed by the Command-Line Client. Typically the first command in the script will use "ask" and then subsequent commands use "last" to access the same review.

Opening a Browser

Collaborator is fundamentally a web-based tool and the actual reviewing goes on in a browser. Many Command-Line Client commands automatically open a browser to allow the user to take the next step. You can prevent the Command-Line Client from opening a browser by specifying the `no-browser`^[455] global option.

You can also explicitly open a browser using the `ccollab browse` command. Note the `browse` command ignores the `no-browser`^[455] global option.

"Virtual" Script Users

Often when setting up scripting it is convenient to create a Collaborator user which the script will use to log in to the Collaborator server. Simply create a user in the normal way and give the credentials (login and password) to the script. The command-line scripting commands will not cause the "virtual" script user to consume a license (except `ccollab admin wget`, if the URL it is loading consumes a license).

Downloading file version content

A special URL lets you download the binary contents of any file version efficiently. The URL is authenticated, so you have to use `ccollab admin wget`. Note the version content URL does not consume a license.

For example, to get a file version with ID 12345:

```
ccollab admin wget "/data/server?versionid=12345"
```

The 'wget' command can also be used to:

Get all diffs in a review:

```
ccollab admin wget "/diff?context=<context>&reviewid=<review id>"
```

Get diffs from two specific versions:

```
ccollab admin wget "/diff?context=<context>&reviewid=<review id>&versionids=<version a>,<version b>"
```

9.2.1 Mirroring Defects to an external issue-tracker

In this tutorial we will set up a script that will automatically mirror defects found during a peer review in Collaborator to an external issue-tracking system. In this tutorial we will mirror defects to [FogBugz](#), but the steps in this tutorial can be modified to mirror defects to any external issue-tracker.

Outline

When a Defect is created in Collaborator the [Defect activity trigger](#)^[197] invokes a script which creates a new "Case" in FogBugz with a link back to the review. Then the Defect in Collaborator is marked "external" with a link to the mirrored Case in FogBugz.

Prerequisites

The script in this example is written in Perl, so the server must have the [Perl runtime](#) installed. The script invokes the Collaborator Command-Line Client, so that needs to be installed on your server machine as well. Be sure to install these prerequisites so that they are accessible and executable by the system user which is running the Collaborator server (this is especially important on Unix systems).

Script Step 1: Set up constants

The script will need to know a few values to do its work. These will be hard-coded in to the script:

```
# URL to the Collaborator Server
$COLLAB_URL = "http://localhost:8080";

# Login of Collaborator User who will mark the Defect as external
$COLLAB_USER = "admin";

# Password of Collaborator User who will mark Defect as external
$COLLAB_PASSWORD = "";

# URL to the FogBugz server
$FOGBUGZ_URL = "http://bugs";

# Email of user to use to create Case in to FogBugz
$FOGBUGZ_USER_EMAIL = "person\@yourcompany.com";

# Password of user to use to create Case in to FogBugz
$FOGBUGZ_USER_PASSWORD = "yourpasswordhere";
```

Script Step 2: Read parameters from command-line

The Review ID, Defect ID, and Defect title will be supplied by Collaborator as parameters when it invokes the script from the trigger (we set that up in [Step 9](#)⁽⁸³¹⁾). The script needs to read those parameters from the command-line:

```
# read parameters from command-line
$reviewId = $ARGV[0];
$defectId = $ARGV[1];
$defectTitle = $ARGV[2];
```

Script Step 3: Logon to FogBugz

The script will use the [FogBugz web services API](#) to mirror the Defect in to FogBugz. In order to use the API we first have to "logon" and acquire an "authentication token":

```
# logon to FogBugz
my $response = get("$FOGBUGZ_URL/api.php?
cmd=logon&email=$FOGBUGZ_USER_EMAIL&password=$FOGBUGZ_USER_PASSWORD")
;

# extract authentication token
$response =~ /<token>(?!<![CDATA\[ \] ? ([^\]]+ ) (? : \ ] \ ] > ) ? < \ / token > / ;
my $token = $1;
```

Script Step 4: Create Case in FogBugz

The script creates a "Case" in FogBugz, setting the title of the Case to the text from the Collaborator Defect, and putting a link back to the Collaborator server in the description of the Case. Note that the Defect title and Case description have to be escaped because they are going in to a "get" URI. The script extracts the resulting Case ID and saves it for later:

```
# create new Case
$defectTitle = uri_escape($defectTitle);
$description = uri_escape("Defect D$defectId mirrored from
Collaborator Review $reviewId ($CCOLLAB_URL/index.jsp?
page=ReviewDisplay&reviewid=$reviewId)");
$response = get("$FOGBUGZ_URL/api.php?
token=$token&cmd=new&sTitle=$defectTitle&sEvent=$description");
```

```
# extract Case ID
$response =~ /ixBug="(\\d+)"/;
my $case = $1;
```

Script Step 5: Logoff from FogBugz

The script logs off from FogBugz, invalidating the authentication token:

```
# log off from FogBugz (invalidate authentication token)
$response = get("$FOGBUGZ_URL/api.php?token=$token&cmd=logoff");
```

Script Step 6: Mark Collaborator Defect as "external"

The script runs the Command-Line Client `ccollab admin review defect mark-external` command to mark the Defect as external. The "external-name" of the Defect is the Case number in FogBugz (which will appear as a link after [Step 8](#)):

```
# mark Defect as "external" in Collaborator
$ccollabOptions = "--url $CCOLLAB_URL";
$ccollabOptions .= " --user $CCOLLAB_USER";
$ccollabOptions .= " --password \"$CCOLLAB_PASSWORD\"";
$ccollabOptions .= " --quiet --non-interactive";
system("ccollab $CCOLLAB_OPTIONS admin review defect mark-external
$defectId \"Case $case\"");
```

This step in the script works fine if you have configured Collaborator to work with MySQL. With any other database, the process is slightly more complicated - please [contact technical support](#) for more details.

Step 7: Test the script from the command-line

That is our whole script! Here it is in finished form: [mirror-defect.pl](#) (opens in a new window). Do not forget to replace the constants in the script (urls, users, passwords and so on) with the appropriate values for your environment, then copy the script to an accessible place on your server. The script needs to be readable by the system user which is running the Collaborator server.

Before you configure the Collaborator server to invoke the script automatically, test it manually by opening a console on your server machine running it on the command-line. **Be sure to log in to your server machine as the user which is running the Collaborator server.** First create a review and create a defect in the review, then run the script.

For example, if you created Review 1234 with Defect D5678, then run the script with this command:

```
C:\Perl\perl.exe "C:\Program Files\Collaborator Server\mirror-defect.pl" 1234 5678 "mirrored Defect title"
```

You should see output similar to this:

```
Mirrored Defect D5678 in FogBugz as Case 91011
Connecting to Collaborator Server http://localhost:8080
Connected as: Collaborator Administrator (admin).
D5678 marked as external
```

When you refresh your browser in Collaborator you should see the Defect has been marked as external, with the description "Case 91011".

Step 8: Set up Bug-Tracking integration link

Using the Collaborator built-in Bug-Tracking hyperlink function, set up the text "Case <number>" to automatically hyperlink to that Case number in FogBugz^[786]. Now if you go back to look at Defect D5678 in Collaborator the text "Case 91011" should be a hyperlink to Case 91011 in FogBugz.

Step 9: Invoke Script from a trigger

Make sure you have Step 7^[830] working before you move on to this step. The last thing we need to do is tell the Collaborator server to automatically invoke the `mirror-defect.pl` script when a Defect is created. We do this with the Defect Activity trigger^[197]. We will use these values:

Executable: C:\Perl\perl.exe

Parameters: "C:\Program Files\merge2.2\specs\collab\Baggage\mirror-defect.pl" "\$review.id" "\$defect.id" "\$defect.txt"

Defect Activity	
A defect was added, modified, or marked open/fixd. Use the defect unique ID to determine the difference.	
Executable:	<input type="text" value="C:\Perl\perl.exe"/>
Parameters:	

Note that it is important to use the FULL PATH of both the Perl runtime and the `mirror-defect.pl` script. Also note that the parameters are enclosed in quotes in case they have spaces in them. The [Review id](#)^[150], [Defect id](#)^[152], and [Defect text](#)^[152] come from [substitution variables](#)^[149].

Finished

That is it! Now when anyone creates a Defect in Collaborator it will be automatically mirrored to FogBugz, and the Defect will be "marked as external" with a link to the Case in FogBugz. Note that for performance reasons the trigger runs *after* the Defect is created in a separate thread, so you may have to refresh your browser a couple of seconds after creating the Defect to see it automatically externalized.

9.2.2 Syncing users from Perforce

In this tutorial we will write a script that will create a corresponding Collaborator user for every Perforce user. The script can be run periodically to pick up any new Perforce users.

This script performs the same actions as the [ccollab admin syncusers](#)^[698] command.

Outline

The script runs the Perforce `p4 users` command, parses the output, and then calls the Collaborator Command-Line Client `ccollab admin user create` command for every user. If the user already exists then the `ccollab admin user create` command fails and the script goes on to the next user.

Prerequisites

The script in this example is written in Perl, so you must have the [Perl runtime](#) installed. The script invokes the Collaborator Command-Line Client, so that needs to be installed as well. Note you must be a Collaborator Administrator in order for this script to work.

Script Step 1: Get users from Perforce

The script runs the `p4 users` command to get the a list of all user records from Perforce.

```
# Get users from Perforce
@p4Users = `p4 users`;
```

Script Step 2: Parse fields from Perforce user record

The script extracts the user name, email, and full name from the Perforce user record.

```
#parse fields from Perforce user record
$p4User =~ /(\S+)\s*<([\^>]*>\s*\((.*?)\)\s*accessed.*;/;
```

```
$user = $1;  
$email = $2;  
$fullName = $3;
```

Script Step 3: Create user in Collaborator

The script runs the Command-Line Client `ccollab admin user create` command to create the user in Collaborator. If a user with that name already exists, the command fails and the script goes on to the next user.

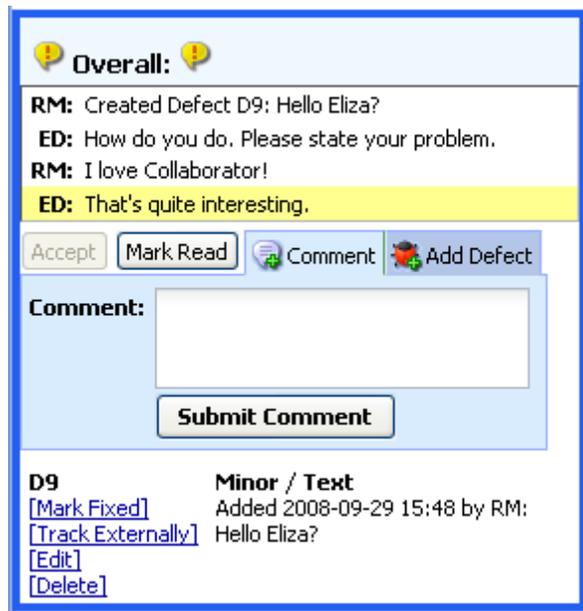
```
#create user in Collaborator - does nothing if user already exists  
system("ccollab admin user create \"$user\" --email \"$email\" --  
full-name \"$fullName\");
```

Finished

That is it! Here is the script in finished form: [syncusers-p4.pl](#) (opens in a new window). You can run this script periodically (for example, with a `crontab` job) and it will keep your Perforce users and Collaborator in sync.

9.2.3 Conversation with Eliza

In this tutorial we will set up a script that will let a user have a conversation with the classic [ELIZA](#) program. Eliza will appear to chat using comments in a Review. Eliza will only respond to comments in conversations that have a Defect containing her name.



Conversation with Eliza

Outline

When a Defect is created in Collaborator the [Defect Activity trigger](#)¹⁹⁷ launches a Perl script in the background. The script polls Collaborator for comments using the Command-Line Client. When it finds a new comment, it passes the comment to an implementation of the ELIZA program, and then posts Eliza's response to the conversation using the Command-Line Client.

The script runs indefinitely until the Defect is marked fixed or deleted, or the Review is finished.

Prerequisites

The script in this example is written in Perl, so you must have the [Perl runtime](#) installed.

The Perl script invokes the Collaborator Command-Line Client, so that needs to be installed on your server machine. Be sure to install the Command-Line Client so that it is accessible and executable by the system user which is running the Collaborator server (this is especially important on Unix systems).

The script uses a clone of ELIZA written in Perl called [Chatbot::Eliza](#) which must be installed.

Script Step 1: Set up constants

The script will need to know a few values to do its work. These will be hard-coded in to the script:

```
# URL to the Collaborator Server
```

```

$COLLAB_URL = "http://localhost:8080";

# Login of Collaborator User who Eliza will use for chat
# should be a Collaborator administrator
$COLLAB_USER = "eliza";

# Password of Collaborator User who Eliza will use for chat
$COLLAB_PASSWORD = "eliza";

# Seconds to sleep before polling for new chat
$REFRESH_DELAY_SECONDS = 4;

```

Script Step 2: Read parameters from command-line

The Review ID and Defect ID will be supplied by Collaborator as parameters when it invokes the script from the trigger (we set that up in [Step 12](#)^[84†]). The script needs to read those parameters from the command-line:

```

# read parameters from command-line
$reviewId = $ARGV[0];
$defectId = $ARGV[1];

```

Script Step 3: Create XSL Transform

The script needs to extract multiple pieces of information from the Collaborator server. To do that more efficiently it uses an [XSL Transform](#) to extract everything in a single call to `ccollab admin review-xml` ([Step 6](#)^[83†]). The XSL is inlined in the Perl script using "here-document" syntax.

```

#xslt file we will use to extract info from Collaborator
$xslt = <<XSLT;
<?xml version="1.0" encoding="UTF-8"?>
<xsl:stylesheet xmlns:xsl='http://www.w3.org/1999/XSL/Transform'
version='1.0'>

  <xsl:template match='//reviews/review'>

    <!-- get review phase -->
    <xsl:value-of select='general/phase' /><xsl:text>

```

```
</xsl:text>

  <!-- find defect -->
  <xsl:for-each select='defects/defect[\@defectId=$defectId]'\>

    <!-- get defect status -->
    <xsl:value-of select='status' /><xsl:text>

</xsl:text>

    <!-- get defect text-->
    <xsl:value-of select='text' /><xsl:text>
</xsl:text>

  </xsl:for-each>

  <!-- find the conversation we are talking on (the one with the
defect) -->
  <xsl:for-each select='conversations/conversation[defects/
conversation-defect/\@defect-id=$defectId]'\>

    <!-- find last comment in conversation -->
    <xsl:for-each select='comments/comment[last()]'\>

      <!-- get author -->
      <xsl:value-of select='\@creator' /><xsl:text>
</xsl:text>

      <!-- get text -->
      <xsl:value-of select='text()' /><xsl:text>
</xsl:text>

    </xsl:for-each>

    <!-- get file-path (empty for overall comment) -->
```

```

        <xsl:value-of select='\@file-path' /><xsl:text>
</xsl:text>

        <!-- get line-number (empty for overall comment or file
overall comment) -->
        <xsl:value-of select='\@line-number' /><xsl:text>
</xsl:text>

    </xsl:for-each>

</xsl:template>
</xsl:stylesheet>
XSLT

```

Script Step 4: Initialize Eliza

The Chatbot::Eliza program is initialized by a simple constructor.

```

# initialize Eliza
$eliza = new Chatbot::Eliza;

```

Script Step 5: Sleep for a few seconds

The rest of the script loops until the script decides to exit ([Step 7](#)⁸³⁸). Every time it starts the loop, the script first sleeps for a few seconds to make sure it does not put too much load on the server.

```

# sleep so we do not hammer the server
sleep($REFRESH_DELAY_SECONDS);

```

Script Step 6: Query Collaborator server for info

The script invokes the `ccollab admin review-xml` command, passing in the XSL created in [Step 3](#)⁸³⁵ on STDIN. The output is then parsed to get the Review Phase, Defect status, Defect text, comment Author, comment text, and optionally file path and line number.

```

# Query Collaborator server for info
$pid = open2(*CCOLLAB_OUTPUT, *XSL_INPUT, "ccollab $ccollabOptions
admin review-xml $reviewId --xsl-file -");
print XSL_INPUT $xslt;
close(XSL_INPUT);

```

```
chomp(($spacer, $reviewPhase, $defectStatus, $defectText, $author,  
$inputChat, $filePath, $lineNumber) = <CCOLLAB_OUTPUT>);  
close(CCOLLAB_OUTPUT);  
waitpid($pid,0);  
  
#cleanup filePath and lineNumber  
chop($filePath);  
chop($lineNumber);  
  
#debug  
print "reviewPhase = $reviewPhase\n";  
print "defectStatus = $defectStatus\n";  
print "defectText = $defectText\n";  
print "author = $author\n";  
print "inputChat = $inputChat\n";  
print "filePath = \"$filePath\"\n";  
print "lineNumber = \"$lineNumber\"\n";  
print "\n";
```

Script Step 7: Stop script if appropriate

The script runs in an infinite loop, but we do not really want it to go forever! The script exits if any of the following conditions are true:

- The Review finishes (no longer in inspection phase)
- The Defect is fixed or deleted (no longer open)
- The Defect text does not mention Eliza

```
# safety - quit if review is not in Inspection phase  
die ("Review is no longer in Inspection phase") if ($reviewPhase !~ /  
Inspection/);  
  
# safety - quit if defect is not open  
die ("Defect $defectId is no longer open") if ($defectStatus !~ /  
open/);
```

```
# safety - quit if defect text does not mention "Eliza"
die ("Defect $defectId text does not mention Eliza") if
($defectText !~ /Eliza/);
```

Script Step 8: Ignore comment if appropriate

The script checks whether the comment is a "system" comment like "*** Marked Read***" or if the last comment in the conversation was made by Eliza herself. In both of these cases the script skips back to the top of the loop.

```
# Eliza should not respond to system messages, like "*** Marked Read
**" or "*** Accepted **"
next if ($inputChat =~ /^*\*/);

# Eliza should not talk to herself
next if ($author =~ /\$CCOLLAB_USER/);
```

Script Step 9: Get response from ELIZA

The script passes the user's comment to the ELIZA program and gets back her response.

```
# Get response from Eliza
$outputChat = $eliza->transform($inputChat);

#debug
print "$outputChat\n";
print "\n";
```

Script Step 10: Upload Eliza's response to Collaborator

The script uploads Eliza's response to the conversation using the ccollab admin review comment create command.

```
# build command to upload Eliza's comment to Collaborator
$uploadCommand = "ccollab $ccollabOptions admin review comment create
$reviewId \"$outputChat\"";

# file path is optional (no file path for overall review chat)
```

```
if ($filePath) {
  $uploadCommand .= " --file \"$filePath\"";
}

# line number is optional (no line number for overall review chat or
overall file chat)
if ($lineNumber) {
  $uploadCommand .= " --line-number $lineNumber";
}

#debug
print "Running $uploadCommand\n";

# upload Eliza's comment to Collaborator
system("$uploadCommand");
```

Step 11: Test the script from the command-line

That is our whole script! Here it is in finished form: [eliza.pl](#) (opens in a new window). Do not forget to replace the constants in the script (url, user, password) with the appropriate values for your environment, then copy the script to an accessible place on your server. The script needs to be readable by the system user which is running the Collaborator server.

Before you configure the Collaborator server to invoke the script automatically, test it manually by opening a console on your server machine running it on the command-line. **Be sure to log in to your server machine as the user which is running the Collaborator server.** First create a Review and create a Defect in the Review with the word "Eliza" in it, then run the script.

For example, if you created Review 1234 with Defect D5678, then run the script with this command:

```
/usr/bin/perl /home/rpaterson/eliza.pl 1234 5678
```

You should see output similar to this:

```
reviewPhase = Inspection
defectStatus = open
defectText = Hello Eliza?
author = rpaterson
inputChat = Created Defect D11: Hello Eliza?
filePath = "SymlinkTest.java"
```

```

lineNumber = "73"

How do you do. Please state your problem.

Running ccollab --url http://localhost:8080 --user eliza --password
"eliza"
--quiet --non-interactive admin review comment create 1234
"How do you do. Please state your problem". --file "SymlinkTest.java"
--line-number 73

```

The script will loop until you mark the Defect fixed or deleted, or finish the Review. When you refresh your browser in Collaborator you should see Eliza's comment.

Step 12: Invoke Script from a trigger

Make sure you have [Step 11](#)^[840] working before you move on to this step. The last thing we need to do is tell the Collaborator server to automatically invoke the `eliza.pl` script when a Defect is created. We do this with the [Defect Activity trigger](#)^[197]. We will use these values:

```

Executable: /usr/bin/perl
Parameters: -e "exit unless fork; system('/usr/bin/perl /home/
rpaterson/eliza.pl ${review.id} ${defect.id} ');""

```

Defect Activity	
A defect was added, modified, or marked open/fixd. Use the defect unique ID to determine the difference.	
Executable:	<input type="text" value="/usr/bin/perl"/>
Parameters:	<input "="" bin="" exit="" fork;="" home="" perl="" rpaterson="" system('="" type="text" unless="" usr="" value="-e \"/>
<input type="button" value="Save"/> <input type="button" value="Revert"/>	

Defect Activity Trigger

Note that it is important to use the FULL PATH of both the Perl runtime and the `eliza.pl` script. Also note the quotes and spaces - they are important. The [Review id](#)^[150], and [Defect id](#)^[152] come from [substitution variables](#)^[149]. The Perl snippet included in the Parameters field causes the script to be launched in a background process.

Finished

That is it! Now when anyone creates a Defect in Collaborator the script will be invoked. If the Defect has the word "Eliza" in it then the script will monitor that conversation for comments and have Eliza respond to them.

9.3 JSON API Web Services

This section describes the JSON API version of the web services. Using web services you can easily integrate your application with Collaborator.

The benefit of JSON API version of the services is that you can exchange data with almost any client application.

The section covers the following questions:

Using JSON API Web Service

Gives general overview of the web service API and demonstrates how to use it from Web Client and from client applications.

JSON Syntax and Data Formats

Describes the syntax of request and response objects.

Authentication

Explains different variants of logging into a server.

Error Handling

Tells about server reaction on errors and describes the format of error list.

JSON API Reference

Gives a link to the complete reference on all objects and commands of JSON API and describes how to work with this reference.

How To

Describes how to perform typical tasks using JSON API.

9.3.1 Using JSON API Web Service

JSON API lets you integrate any external tool with Collaborator. To do this, you need to exchange data between your application and your Collaborator server. To use the web service you need to send requests to web service endpoint URL and receive responses from it. The service receives and sends data in [JavaScript Object Notation \(JSON\)](#). For detailed information on JavaScript Object Notation, see [JSON Syntax and Data Formats](#)^[845].

Endpoint URL

The web service resides on your Collaborator server at the following endpoint URL:

- **`http(s)://yourServer.com/services/json/v1`**

Using JSON API Web Client

To get acquainted with service requests and responses, you can open the endpoint URL in a web browser. It will display a simple form, where you can write JSON commands and get service responses within the same page.

Let us try to call some JSON commands manually:

1. Open a web browser and navigate to JSON API web service URL:

- **`http(s)://yourServer.com/services/json/v1`**

2. Enter the following command into the input field:

```
[
  {"command" : "ServerInfoService.getVersion"},
  {"command" : "Examples.echo", "args" : {"echo" : "Some text."}}
]
```

3. Press "Submit Query" button.

After the page is reloaded you will get the response from the service with the results of your commands:

```
[ {
  "result" : {
    "version" : "9.0.9000"
  }
}, {
  "result" : {
```

```
    "echo" : "Some text."
  }
} ]
```

Later on you can use JSON API web interface to try and debug JSON commands manually before sending them programmatically from your client application.

Using JSON API From Client Applications

The client and server exchange data in the JSON format via HTTP(s) requests and responses. Client application must send POST requests to JSON web service endpoint URL. The requests should contain a JSON object in their body or in the POST variable named "json". For multipart requests the JSON object must be either in a "json" string part or in a "json" query parameter.

A JSON object in a request specifies a list of commands to be executed and arguments for these commands.

Here is an example of a POST request:

```
POST http://yourServer.com/services/json/v1 HTTP/1.1
User-Agent: JSON API
Content-Type: application/json;charset=utf-8
Host: yourServer.com
Content-Length: 138

[
  {"command" : "ServerInfoService.getVersion"},
  {"command" : "Examples.echo","args" : {"echo" : "Some text."}}
]
```

A multipart variant of the same request will be:

```
POST http://yourServer.com/services/json/v1 HTTP/1.1
Content-Type: multipart/form-data; boundary=-----
acebdf13572468
User-Agent: JSON API
Host: yourServer.com
Content-Length: 265

-----acebdf13572468
```

```
Content-Disposition: form-data; name="json"
Content-type: text/plain; charset=utf-8

[
  {"command" : "ServerInfoService.getVersion"},
  {"command" : "Examples.echo", "args" : {"echo" : "Some text."}}
]
-----acebdf13572468--
```

On receiving the request, the server processes each command in order and builds up a response. The JSON object in response contains a list of results corresponding to each of the command that you submitted. Each result consists of either the return values for that command, or a list of errors returned by the command. See [Error Handling](#)⁸⁵⁰.

The response to the any of the requests above will be:

```
HTTP/1.1 200 OK
Server: Apache-Coyote/1.1
Content-Type: application/json; charset=utf-8
Content-Length: 68
Date: Thu, 27 Nov 2014 10:55:25 GMT

[{"result":{"version":"9.0.9000"}}, {"result":{"echo":"Some text."}}]
```

In further examples of this section, we will omit request and response headers (when their content is not important) and give only the examples of JSON parts.

9.3.2 JSON Syntax and Data Formats

All data-interchange with the service is performed in [JavaScript Object Notation](#) (JSON).

JSON uses two data structures: a collection of name/value pairs and an ordered list of values. JSON engine ignores whitespace, tabulation, and newline characters, however you can use them to improve readability.

JSON Objects In Requests

A JSON object that is sent in web service requests (**request object**) specifies a list of commands to be executed and arguments for these commands.

The simplest variant of a JSON request object is:

```
[
  {"command" : "MethodName1"}
]
```

The "command" : "MethodName1" pair defines which command a server should run. The method name is specified using dot notation. For example "ServerInfoService.getVersion", or "Examples.checkLoggedIn".

If a method needs some arguments, then you will need to add the "args" : { } pair which specifies a list of arguments:

```
[
  {"command" : "MethodName1",
    "args" :
    {"argumentName1":"value1","argumentName2":"value2",... "argumentNameN"
    : "valueN"}
  }
]
```

The "argumentName" : "value" pairs define argument names and their values. A value can be a string in double quotes, or a number, or true or false or null, or an object or an array. When a method needs more than one argument, the "argumentName" : "value" pairs are separated by commas. Argument pairs can be specified in any order.

You can create batch commands, that is, pass several commands in one JSON request object. Different commands should be separated by commas. For example:

```
[
  {"command" : "ServerInfoService.getVersion"},
  {"command" : "Examples.echo",
    "args" : {"echo" : "Some text."}
  },
  {"command" : "SessionService.setMetadata",
    "args" : {
      "clientName" : "HTML JSON API Tester",
      "expectedServerVersion" : "9.0.9000"
    }
  }
]
```

```
}
]
```

JSON Objects In Responses

A JSON object that is received in web service responses (**response object**) contains a list of results corresponding to each of the command that was submitted. Each result consists of either the "result" : {} pair that lists the command return values (if any), or the "errors" : [] pair that lists the errors returned by the command. (See [Error Handling](#)^[850] for details).

Results for several commands that were passed in a single JSON request object are returned as a comma separated list. For example the response object for the previous request will be:

```
[
  { "result" : { "version" : "9.0.9000" } },
  { "result" : { "echo" : "Some text." } },
  { "result" : { } }
]
```

Date and Time Format

To specify date and time values, use strings having the format "YYYY-MM-DDTHH:mm:ssZ". For example: "2008-01-01T22:50:00Z" or "2008-01-01T16:50:00-06:00".

The table below describes the parts of this format.

YYY Y	Year
M M	Month
DD	Day of the month
T	Specifies the start of a time notation.
HH	Hours
mm	Minutes
ss	Seconds
Z	Time zone. The value in this position can be one of the following:

	<p>Z - indicates UTC time</p> <p>+hh:mm - indicates that the input time is the specified offset after UTC time.</p> <p>-hh:mm - indicates that the input time is the absolute value of the specified offset before UTC time.</p>
--	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

9.3.3 Authentication

For the majority of commands, you will need to be logged in to the server. Therefore you may need to pass your authentication information along with the request.

Important: All data (including user credentials) that is sent via HTTP protocol is sent in plain text format. We recommend using HTTPS protocol for secure client/server communication. Read [Configuring HTTPS](#)^[117] to learn how to enable it.

General Information

JSON API web service uses session authentication. Authentication data are valid only while executing batch commands were sent in the same request. Authentication takes place inside of the JSON request. No special cookie handling is required.

To execute the commands from another request you will need to pass authentication information again.

Tip: To verify if you are logged in for the current batch of commands, call the `Examples.checkLoggedIn` command.

The preferred way to authenticate is to send a user login and a special alpha-numeric identifier called **login ticket**. The benefit of login ticket is that you do not have to specify your password explicitly. Using login tickets works faster if a server uses [LDAP authentication](#)^[106]. Besides, the users will have an option of [invalidating login tickets](#)^[185] if they want to make very sure they are logged out of the system everywhere.

Generating Login Tickets

To perform first-time authentication and generate a login ticket, use the `SessionService.getLoginTicket` command. It accepts user login and password as input arguments and returns a login ticket which you can use in your subsequent requests.

The following request logs in as "jsmith" and obtains a login ticket for further usage:

```
[
  {"command" : "Examples.checkLoggedIn"},
  {"command" : "SessionService.getLoginTicket",
    "args":{"login":"jsmith","password":"qwerty12345"}},
  {"command" : "Examples.checkLoggedIn"}
]
```

The server will send the following response:

```
[
  { "result" : { "loggedIn" : false } },
  { "result" : { "loginTicket" :
    "0123456789abcdef0123456789abcdef" } },
  { "result" : { "loggedIn" : true } }
]
```

Authenticating With Login and Login Ticket

To authenticate using a login and login ticket use the `SessionService.authenticate` method. It accepts user login and login ticket as input arguments.

The following request logs in using a login ticket:

```
[
  {"command" : "Examples.checkLoggedIn"},
  {"command" : "SessionService.authenticate",
    "args":
    {"login":"jsmith","ticket":"0123456789abcdef0123456789abcdef"}},
  {"command" : "Examples.checkLoggedIn"}
]
```

The server response will be:

```
[
  { "result" : { "loggedIn" : false } },
  { "result" : { } },
  { "result" : { "loggedIn" : true } }
]
```

```
]
```

9.3.4 Error Handling

Responses from the JSON API web service contain a list of results corresponding to each of the command that was submitted. Each result may contain either a "result" : { } pair that lists the command return values (if any), or the "errors" : [] pair that lists the errors returned by the command.

If an error occurs during processing a request having multiple commands, the service stops execution of further commands and sends a response object with the results of preceding commands and the error description for the current command.

The Format of Error Descriptions

The returned "errors" : [] pair holds an array with one or more error descriptions. Each error description has the following fields:

1. "code" - Short error code, which you can use for error handling.
2. "message" - More detailed description of the error. This message can be displayed to the end-users.
3. "data" - Any extra data that is relevant for the particular error. This is an optional field and it may be omitted.

Sample Error Descriptions

Below are several examples of error descriptions:

- Unneeded parenthesis in command name:

```
[ { "errors" : [
  { "code" : "NoSuchCommand",
    "message" : "The command 'ServerInfoService.getVersion()' does
not exist." } ]
} ]
```

- Incorrect authentication:

```
[ { "errors" : [
  { "code" : "AuthenticationFailed",
    "message" : "Could not authenticate user 'jsmith' using
password provided." } ]
} ]
```

9.3.5 JSON API Reference

Complete reference on all API objects and methods is available at the following URL:

- [http\(s\)://yourServer.com/javadoc/jsonapi/](http(s)://yourServer.com/javadoc/jsonapi/)

The reference lists all the commands that are available to JSON web service and describes the fields of the request and response objects.

API reference documentation uses Javadoc notation to describe the objects, methods and interfaces. In order to use the command, object or field in your JSON requests, you need to convert the Javadoc notation to Java Script Object Notation.

To determine a name of the desired JSON field, remove the "get" prefix from the method name and put the first letter to lower case.

For example, a Javadoc description for the `LoginTicketRequest` interface says that it has the `getLogin` and `getPassword` methods.

A JSON object that corresponds to this interface will look like this:

```
{"login": "jsmith", "password": "js123"}
```

9.3.6 How To

This topic demonstrates how to perform some typical tasks via JSON API Web services:

Manage Reviews and Review Participants

1. List reviews assigned to a specified user
2. Create new review
3. Add/change participants of a review

Upload Review Materials

1. Add files through a /content upload servlet
2. Add files with a multipart HTTP requests

Manage Users and User Groups

1. Create new user
2. Add user to group

In order to perform all these tasks you need to be logged in to Collaborator server. Therefore in each sample below we will first call the `SessionService.authenticate` command to provide user credentials. See [Authentication](#)^[846] topic for details.

9.3.6.1 Manage Reviews and Review Participants

To manage reviews and review participants use the `ReviewService` interface. It provides methods for creating and editing reviews, adding, updating, removing and poking participants, adding review materials, changing review phases, managing comments and conversations and so on.

1. [List reviews assigned to a specified user](#)^[852]
2. [Create new review](#)^[853]
3. [Add/change participants of a review](#)^[854]

List reviews assigned to a specified user

To get a list of reviews we will use the `UserService.getActionItems` command which returns a list of incoming and outgoing [action items](#)^[307] a user is included in.

Request:

```
[  {"command" : "SessionService.authenticate",
    "args":
{"login":"jsmith","ticket":"0123456789abcdef0123456789abcdef"}},
  {"command" : "UserService.getActionItems"}
]
```

Response example:

```
[  { "result" : { } },
  { "result" : { "actionItems" : [
    { "nextActionText" : "Waiting for comments", "text" : "(No action
required) Waiting for comments: Review #10254: \"Fix for case 34534
\"" },
    { "nextActionText" : "Finish creating", "text" : "Finish creating:
Review #10435: \"Documentation review\"" },
```

```
{ "nextActionText" : "Waiting for Defect rework", "text" : "(No
action required) Waiting for Defect rework: Review #10188: \"Message
Templates\"" }
] } }
]
```

Create new review

To create a review use the `ReviewService.createReview` command. It accepts a number of arguments that define the creator (`creator`), review title (`title`), deadline date and time (`deadline`), specify who can access the review (`accessPolicy`) and other parameters. All parameters are optional.

Deadline date and time should be specified in a "YYYY-MM-DDTHH:mm:ssZ" format described in [JSON Syntax and Data Formats](#)⁸⁴⁵. The `accessPolicy` argument may have one of the following constants: `ANYONE`, `GROUP`, `PARTICIPANTS`, `GROUP_AND_PARTICIPANTS`, `GROUP_OR_PARTICIPANTS`.

The request below creates a new review:

```
[
  { "command" : "SessionService.authenticate",
    "args":
    {"login":"jsmith","ticket":"0123456789abcdef0123456789abcdef"}},
  {"command" : "ReviewService.createReview",
    "args" :{
      "creator" : "jsmith",
      "title" : "Check JDK version",
      "deadline" : "2015-02-01T09:00:00Z",
      "accessPolicy" : "PARTICIPANTS",
      "customFields": [
        {"name":"Overview", "value":["Please check the JDK version
that we use."]},
        {"name":"Incident ID", "value":["1321654"]}
      ]
    }
  }
]
```

On success the command returns an identifier of a newly created review.

Response example:

```
[ { "result" : { } },
  { "result" : { "reviewId" : 10463 } }
]
```

NOTE: A newly created review is not yet ready for working on it. To processed, we need to [assign review participants](#)^[854] and [add review materials](#)^[855].

Add/change participants of a review

Web service API offers two commands for assigning participants of the review: `ReviewService.setAssignments` and `ReviewService.updateAssignments`. The `setAssignments` command clears the list of existing review participants (if any) and assigns participants and roles anew. The `updateAssignments` command adds new participants and changes the roles of existing participants.

Both commands have the same set of arguments:

`reviewId` - the ID of the review whose participants we want to add or modify.

`assignments` - an array that defines review participants and their roles.

Each element of the array must be either a `{"user", "role"}` object or a `{"poolGuid", "role"}` object. In the first case the object will denote an individual participant and his role, while in the second it will denote a group of users ([review pool](#)^[863]) that can partake in a review and the role for this group.

The "role" argument can be one of the following constants: `AUTHOR`, `MODERATOR`, `OBSERVER`, `READER`, `REVIEWER`, `TESTER`.

```
[
  { "command" : "SessionService.authenticate",
    "args":
    {"login":"jsmith","ticket":"0123456789abcdef0123456789abcdef"}},
  { "command" : "ReviewService.updateAssignments",
    "args":{"reviewId":"10463",
    "assignments": [
      {"user":"jsmith", "role":"AUTHOR"},
      {"user":"mike", "role":"REVIEWER"},
      {"poolGuid":"1234567890", "role":"OBSERVER"}
    ]}
}
```

]

9.3.6.2 Upload Review Materials

To upload review materials use the `ReviewService.addFiles` command. This command is rather complex and allows different variants of adding materials to a review. The files may reside on your local computer or be stored in a source code management system. Moreover, the command can add files to an existing review or to create a new review.

You will describe the following use-cases:

1. [Adding local files through a /content upload servlet](#) 
2. [Adding local files with a multipart HTTP requests](#) 

Depending on the particular use-case, the syntax of the `addFiles` command and the number of its arguments will vary. For example, to add materials to an existing review you need to specify the "reviewID" argument. If this argument is omitted, the `addFiles` command will create a new review with the attached files.

On success the `addFiles` command returns an ID of the review where the files were added.

Add files to a review

To add files that are stored on a local computer you need to archive them beforehand. The archived files must follow special conventions described below.

Once the archive is created you can send it to a Collaborator server and attach files to a review. There are two ways to do this:

- Use the `/contentupload` servlet to upload the archive and the subsequent JSON request to attach files.
- Send a single multipart request containing both "json" commands and the archive.

Preparing files for upload

Prior to uploading files to the Collaborator server you need to prepare them as follows:

1. Copy the needed files to a temporary folder.
2. Rename each file to its MD5 checksum. In lower-case letters, without any extension. Suppose that we want to upload a file named "listobject.h" having an MD5 checksum of 198575c00a884ae27968e2fcf7d0a26d. Then the file must be renamed to "198575c00a884ae27968e2fcf7d0a26d".
3. Pack the files into a Zip archive. The name of the resulting Zip archive is not important.

Uploading files via /contentupload servlet

Every Collaborator server has a servlet for uploading data to reviews. It resides at the following URL: `yourServer.com/contentupload`

The servlet accepts multipart HTTP requests that contain Zip archives with files. The file upload request must conform to [RFC 1867: Form-based File Upload in HTML](#).

The servlet requires authentication parameters in the request before processing file uploads. Authentication can be provided with the following methods:

- Header: Authorization header that conforms to the Basic Authentication Scheme from [RFC 2617](#).

```
Authorization: Basic bXl1c2VyOm15cGFzcw==
```

- Header cookies: CodeCollaboratorLogin and CodeCollaboratorTicketId. (To obtain a valid CodeCollaboratorTicketId you need to login via web-interface.)

```
Cookie: CodeCollaboratorLogin=jsmith;  
CodeCollaboratorTicketId=0123456789abcdef0123456789;
```

If the upload is successful, the servlet will respond with a 200 (OK) status.

Below is an example of multipart HTTP request to the /contentupload servlet:

```
POST http://yourServer.com/contentupload HTTP/1.1  
Content-Type: multipart/form-data; boundary=-----  
acebdf13572468  
User-Agent: JSON API  
Host: yourServer.com/  
Cookie: CodeCollaboratorLogin=jsmith;  
CodeCollaboratorTicketId=0123456789abcdef0123456789;  
Content-Length: 1394  
  
-----acebdf13572468  
Content-Disposition: form-data; name="file"; filename="localFiles.  
zip"
```

```
Content-Type: application/x-zip-compressed
```

```
<Binary data of the localFiles.zip file>
-----acebdf13572468--
```

Once the archive is uploaded successfully, the server unpacks it. Later on the you need to send a command to add an already uploaded files to reviews. To add files that were uploaded beforehand, use the following syntax of the `addFiles` command:

```
{ "command" : "ReviewService.addFiles",
  "args" : {
    "reviewId" : "<Id>", OPTIONAL
    "changelists" : [{ REQUIRED
      "commitInfo" : {<commitInfo>}, OPTIONAL
      "versions" : [ { REQUIRED
        "md5" : "<md5Checksum>", REQUIRED
        "localPath" : "<LocalPathToFile>", OPTIONAL
        "scmPath" : "<PathToFileInSCM>", OPTIONAL
        "action" : "<ActionType>", OPTIONAL
        "source" : "<SourceType>", OPTIONAL
        "baseVersion" : OPTIONAL
      }, {<version2>}, ..., {<versionN>}]
    }, {<changelist2>}, ..., {<changelistN>}]
  }
}
```

When adding already uploaded files, we should specify their MD5 checksums (`md5`) and either their local paths (`localPath`) or their paths in SCM (`scmPath`). All other arguments are optional. Notice that archive name is not specified, as the archive has already been unpacked.

The example below, attaches an uploaded file to the specified review:

```
[{"command" : "SessionService.authenticate",
  "args" : {"login" : "jsmith", "ticket" :
"0123456789abcdef0123456789abcdef"}},
{"command" : "ReviewService.addFiles",
  "args" : {
```

```
"reviewId" : "10463",
"changelists" : [{
  "versions" : [ { "md5" : "198575c00a884ae27968e2fcf7d0a26d",
"localPath" : "c:\\work\\collab\\files\\listobject.h",
"source" : "LOCAL" } ]
}]
}
}]
```

Uploading files with a multipart request

In this approach both the JSON commands and one or more archives to be attached are sent in the same multipart request.

The JSON request must be sent in a string part named "json" or as part of the query string as "json" parameter. The attached files must be sent in parts whose names coincides with the archive names. See [RFC 1341: The Multipart Content-Type](#) for detailed description of multipart requests.

To add files that are sent within the same HTTP request, use the following syntax of the `addFiles` command:

```
{"command" : "ReviewService.addFiles",
"args" : {
"reviewId" : "<Id>", OPTIONAL
"zipName" : "<zipNameForCommand>", OPTIONAL
"changelists" : [{ REQUIRED
"commitInfo" : {<commitInfo>}, OPTIONAL
"versions" : [ { REQUIRED
"md5" : "<md5Checksum>", REQUIRED
"zipName" : "<zipNameForChangelist>", OPTIONAL
"localPath" : "<LocalPathToFile>", OPTIONAL
"scmPath" : "<PathToFileInSCM>", OPTIONAL
"action" : "<ActionType>", OPTIONAL
"source" : "<SourceType>", OPTIONAL
"baseVersion" : OPTIONAL
}, {<version2>}, ..., {<versionN>}]
}, {<changelist2>}, ..., {<changelistN>}]
```

```
}

```

When adding files with a multipart request, we should specify the names of archive (`zipName`), MD5 checksums of individual files (`md5`) and either their local paths (`localPath`) or their paths in SCM (`scmPath`). The archive name (`zipName`) can be given at the command level or per changelist. The `zipName` arguments are interchangeable, however at least one of them must be specified. All other arguments are optional.

As mentioned above, the attached files must be sent in parts whose names matches the values of `zipName` arguments of the `AddFiles` command:

```
--boundary separator
Content-Disposition: form-data; name="<zipName>";
filename="<zipName>"
Content-Type: application/x-zip-compressed

<Binary data of the archive file>
```

The overall example of a multipart request may look like this:

```
POST http://yourServer.com/services/json/v1 HTTP/1.1
Content-Type: multipart/form-data; boundary=-----
acebdf13572468
User-Agent: JSON API
Host: yourServer.com
Content-Length: 2041

-----acebdf13572468
Content-Disposition: form-data; name="json"
Content-Type: application/json;charset=utf-8

[{"command" : "SessionService.authenticate",
  "args" : {"login" : "jsmith","ticket" :
"0123456789abcdef0123456789abcdef"}},
 {"command" : "ReviewService.addFiles",
  "args" : {
"reviewId" : "10463",
```

```

"changelists" : [{
  "zipName" : "localFiles.zip",
  "versions" : [ { "md5" : "198575c00a884ae27968e2fcf7d0a26d",
"localPath" : "c:\\work\\collab\\files\\listobject.h",
"source" : "LOCAL" } ]
}]
}
}]
-----acebdf13572468
Content-Disposition: form-data; name="localFiles.zip"; filename="
localFiles.zip"
Content-Type: application/x-zip-compressed

<Binary data of the localFiles.zip file>
-----acebdf13572468--

```

9.3.6.3 Manage Users and User Groups

To perform administrative operations over the users of Collaborator server use the `UserService` interface. It has methods for creating, editing and deleting users and user subscriptions.

To perform administrative operations over user groups use the `GroupService` interface. It has methods for creating, editing and deleting groups, adding subgroups, add users to groups, excluding users from groups and so forth.

To call any of the `UserService` or `GroupService` commands the current user (that is a user who requests to run the command) **must have administrator privileges** on the Collaborator server.

Create new user

To create new user, we will call the `UserService.create` command. It has two obligatory parameters: `login` and `password`. Additionally you can enter the users full name (`fullName`), phone number (`phone`), email (`email`) and specify whether it will be an active user (`enabled`) and whether the user will have administrative privileges (`admin`).

```
[ {"command" : "SessionService.authenticate",
```

```

    "args":
{"login":"jsmith","ticket":"0123456789abcdef0123456789abcdef"}},
  {"command" : "UserService.create", "args" : {
    "login" : "alice",
    "password" : "alice",
    "fullName" : "alice alice",
    "phone" : "345345345",
    "email" : "alice@alice.com",
    "enabled" : "true",
    "admin" : "false"}
}
]

```

Add user to a group

To add a user to some existing group, we will call the `GroupService.addUser` command. The command has two parameters: a login of a user to be added (`memberLogin`) and [group identifier](#)^[216] (`guid`).

```

[
  {"command" : "SessionService.authenticate",
    "args":
{"login":"jsmith","ticket":"0123456789abcdef0123456789abcdef"}},
  { "command" : "GroupService.addUser",
    "args" : {
      "memberLogin" : "alice",
      "guid" : "549ce60e-ea35-46fb-9e39-54529a049abf" }
}
]

```

10 Techniques & Best Practices

At SmartBear, we are experts in all kinds of peer review.

In this part of the manual, we cover techniques and best practices in code review and in Collaborator.

Topics covered include:

- [Invite A Colleague](#)^[862]
Describes how to invite a colleague who currently do not have a Collaborator user account.
- [Review Pools](#)^[863]
Explains how to assign a group of users as participant of the review.
- [Multiple Change Changelists](#)^[865]
Describes the specifics of working with changelists that accumulate changes to file versions over time.
- [Optimal Review Size](#)^[865]
Describes which review sizes are optimal for peer review process.
- [Metrics: Definitions](#)^[866]
Which metrics should you collect during reviews? Which metrics are collected automatically by Collaborator? How are they calculated and what exactly do they mean?
- [Metrics: Analysis](#)^[869]
What do you do with raw metrics numbers? How do you collect those which are not collected automatically? What can metrics really tell us? Where might they lead us astray?
- [Tips and Tricks](#)^[871]
Are there any short-cuts to help me get the results I want?
- [Improving Performance](#)^[871]
Describes several ways to improve the speed of Collaborator.

10.1 Invite A Colleague

Overview

A person currently cannot be added as a participant in a Review until they have a Collaborator user account. This is created the first time they login (even with LDAP integration enabled). The "Invite a colleague" feature makes it possible to invite someone to a Review even if they do not currently have a Collaborator user account, though they will have to create one.

Admin Setting

A setting under [Admin -> General -> Access Restrictions](#)^[177] allows administrators to specify a regular expression that must match against email addresses being invited to Review. The regular expression must match the entire email address, by default it is "." which should match all email addresses entered. The administrator can narrow the available addresses by modifying the regular expression.

For example: ".*@mycompany.com" or ".*@mycompany.com|.*@contractor.com". If an administrator want to disable this feature entirely they can simply enter "This feature is disabled", which will not match any email address.

Using the Feature

When the feature is enabled, each comment added in the Web UI (in any phase other than the Planning phase) will be evaluated to see if it includes e-mail addresses that matches the regular expression. If so, the user is presented with a dialog stating:

"Your comment mentioned an email address. Would you like to invite [list of email addresses in comment] to this Review?"

If the user selects "Yes", their default e-mail client will be opened with a standard invitation that they can edit and send.

If the user selects "No", the email address is ignored.

NOTE: In addition to the regular expression mechanism for configuring and disabling this feature, the user may be presented with different dialogues depending on other access control specifications. For example, if participant-based access restrictions are in place, the user will be notified that the invited users will not be able to access this review. If group-based access restrictions are in place, the system cannot know whether the invited individual will be able to access the review, or not. In this case, the user is notified that the invited person may not be able to access the review.

10.2 Review Pools

Using Review Pools

Review Pools allow an Author to select a Group as a participant, for a given Role, in a review. Groups which have been [configured for use as Review Pools](#)^[229] will be displayed in the New Participant dropdown on the Review Summary page.

The screenshot shows a dialog titled "Add a New Participant:". It features a "Participant:" dropdown menu with a search bar containing "Type to filter". Below the search bar, a list of groups is displayed, including "Developers - Core", "Developers - UI", and "Docs Reviewers". To the right of the list is an "ADD" button. Below the "Participant:" dropdown is a "Role:" dropdown menu set to "Author" and a "State:" dropdown menu set to "Active".

Any number of Review Pool selections can be made, each designating a Role of the participants from each group. Selections can be made only during the Planning and Annotating phases. When Planning is complete, the Author moves the review to the Annotating phase to notify Review Pool participants there is a Review for which they may designate themselves as the participant. All members of the selected Review Pool group will receive notifications that they are invited to participant. Email notifications are sent, if configured. Note that Begin Review will also start the Annotating phase if there are pending Review Pool assignments.

Taking a Review Pool Selection

For each Review Pool assignment, the Participants section of the Review Summary page displays a Take button, which is enabled for eligible participants (members of the Review Pool group). The first eligible participant to go to the Review Summary page and select the Take button becomes a participant with the given Role in the Review.

Review Pool	Role	State	Action
	Author	Active	   x104
	Reviewer	Active	  
Developers - UI	Reviewer	Active	  
Developers - UI	Observer	Active	  



The Review remains in Annotating until all pending Review Pool assignments are taken - the Inspection is not allowed to begin until then.

A review in the Annotating phase with pending Review Pool assignments will automatically begin the Inspection phase once the last review pool selection is made, as long as other participant constraints have been met.

Configuring For Review Pools

In order to enable Review Pools, a Collaborator Administrator will need to [configure Groups to be used for Review Pools](#)^[229].

Review Pool Subscriptions

Administrators can also set-up review pool subscriptions. Once a review of particular author is created, or a review contains some particular files, or a review uses some particular template, Collaborator will automatically add a group to this review. At that the number of review participants to be added and their roles are [fully configurable](#)^[218] for each group.

10.3 Multiple Change Changelists

A changelist is a generic SCM concept representing a set of changes in version control. Changelists for some SCM systems like Perforce and Subversion are atomic entities, representing a single unit of changes that occur at the same time. Other SCM systems have changelists that accumulate changes to file versions over time, allowing multiple changes (versions) of any given file within the same changelist. Some examples of this latter type of changelist are ClearCase Activities and PTC Change Packages.

For these multiple-version changelists, the changelist represents an accumulation of changes to each of the source files in it. In most cases, in the context of a review or in thinking about what the changelist represents, users are interested in the difference represented by the accumulation of changes in the changelist, that is, for each source file the difference between the latest version occurring in the changelist and the version content that existed before the first change in the changelist. Collaborator calculates differences based on this, when a multiple-version changelist is uploaded to a review.

This can be confusing in some circumstances. If an added file is part of the changelist, and there are subsequent changes to that file in the changelist, then uploading this changelist for review will result in the latest change to that file appearing as an add in the changelist. In other words, it will have no predecessor. In an SCM system where added files are always version 1.1, a review of a changelist having version 1.5 of a file with no predecessor is incongruent with the versioning of the SCM system. Yet this is exactly what the accumulation of changes to that file in the changelist represent - a sum total of changes that did not exist before the changelist.

While it might be possible to find and upload all versions of each file that occur in a multiple-version changelist and make them available for comparison in Collaborator, in our experience this makes for an unnecessarily complicated review - this is less of a peer review feature and more of a version history browser feature. If a review is to be conducted on successive revisions to a file in this way, the review should be conducted at each iteration of the changelist. Uploading the same changelist to the same review as each successive set of changes is made as part of the rework step of the review will result in all of the versions of each file being available in the it, and each version being available for inspection by the other review participants.

10.4 Optimal Review Size

We sometimes get asked by customers how large their reviews should be. It is a difficult question to answer because it depends a lot on the review culture of the team and the nature of the content being reviewed. Opinions vary widely on what the optimal size should be.

Creating many tiny reviews is not optimal because of there is some static overhead for each review (setting up participants and metadata, and so forth). There is also a mental penalty for "context switching" when a reviewer changes their attention between two different reviews.

Creating a few giant reviews is not optimal because there is a limited amount of time a reviewer can truly concentrate on a review. Our studies have shown the maximum time to be about 90 minutes. If the review is too large to process in 90 minutes then the review is less effective - defects will be missed and time will be wasted as the reviewer's attention wanders.

Based on our research we recommend the following Optimal Size for reviews, with the understanding that one size does not fit all:

- 3 participants
- 15 files, 3 versions each (3 changelists)
- 2 overall defects, 5 file defects
- 30 file conversations
- 8 comments per conversation

Collaborator is designed to give the best experience at this size. However we do try to support a wide range of sizes so that customers can do what works best for them. Note though that reviews that are more than an order of magnitude larger than this Optimal Size will start to perform sluggishly.

See also

- [Best practices for peer code review](#) - a web site article that describes a successful peer review strategy.

10.5 Metrics: Definitions

Collaborator collects a variety of raw metrics automatically. This section defines these metrics; a [later section](#)^[869] discusses what these metrics can tell us.

Lines of Code

The most obvious raw metric is "number of lines of source code". This is "lines" in a text-file context. Often this is abbreviated "LOC".

Collaborator does not distinguish between different kinds of lines. For example, it does not separately track source lines versus comment lines versus whitespace lines.

For code review metrics, often you usually want to use general lines of code and not break it down by type. Often the code comments are just as much a part of the review as the code itself -- check for consistency and ensuring that other developers will be able to understand what is happening and why.

The lines of code metrics (LOC metrics) are calculated only for source code and other text-based files. For other types of review materials (Word, Excel, PDF or Image files) the metrics are not calculated and return 0.

The LOC metrics displayed on the [Review Summary](#)^[332] page include added lines (+), changed lines (●) and removed lines (-). If the Overlay view is selected (default), the LOC metrics are calculated comparing the latest uploaded revision of file against the baseline revision of that file. Here, the baseline revision stands for the revision at the moment the review was created. If the Separate view is selected, the LOC metrics are calculated comparing each individual file revision against its previous revision.

For reviews created by [pull requests](#)^[735], file changes made by merge commits (if any) are only displayed in Separate view and they are not taken into account when calculating overall LOC metrics. Besides, file changes made by merge commits do not affect the overall rework count of a file.

The [Customizable Review Reports](#)^[408] may provide you with more line-related metrics. Additionally to added, changed and removed lines, they can display total number of all lines of all uploaded files (LOC Uploaded), number of reworked lines (sum of added, changed and removed lines) (LOC Reworked) and the difference between number of added and removed lines (LOC Delta).

Keep in mind, that "Ignore Whitespace", "Ignore Sequence Number" and other [Diff Viewer settings](#)^[346] do not affect on how line metrics are calculated. They only affect on how line differences are displayed.

Time in Review

How much time (person-hours) did each person spend doing the review? Collaborator computes this automatically. This raw metric is useful in several other contexts, usually when compared to the amount of file content reviewed.

Developers (rightly) hate using stopwatches to track their activity, but how can Collaborator -- a web server -- automatically compute this number properly?

Our technique for accurately computing person-hours came from an empirical study we did at a mid-sized customer site. The goal was to create a heuristic for predicting on-task person-hours from detailed web logs alone.

We gave all review authors and reviewers physical stop-watches and had them carefully time their use of the tool. Start the stopwatch when they began a review, pause if they break for any reason -- email, bathroom, instant messenger. The times were recorded with each review and brought together in a spreadsheet.

At the same time, we collected detailed logs of web server activity. Who accessed which pages, when, and so forth. Log data could easily be correlated with reviews and people so we could "line up" this amalgamation of server data with the empirical stopwatch times.

Then we sat down to see if we could make a heuristic. We determined two interesting things:

First, a formula did appear. It goes along these lines: If a person hits a web page, then 7 seconds later hits another page, it is clear that the person was on-task on the review for the whole 7 seconds. If a person hits a web page, then 4 hours later hits another page, it is clear that the person was not doing the review for the vast majority of that time. By playing with various threshold values for timings, we created a formula that worked very well -- error on the order of 15%.

Second, it turns out that humans are awful at collecting timing metrics. The stopwatch numbers were all over the map. People constantly forgot to start them and to stop them. Then they would make up numbers that "felt right," but it was clear upon close inspection that their guesses were wrong. Some people intentionally submitted different numbers, thinking this would make them look good (that is, "Look how fast I am at reviewing!").

So the bottom line is: Our automated technique is not only accurate, it is more accurate than actually having reviewers use stopwatches. The intrinsic error of the prediction heuristic is less than the error humans introduce when asked to do this themselves.

Total Person-Time

The total of all recorded time that all the users were looking at review (includes time spent in annotation, planing, inspection and rework phases). **Total Person-Time** is an aggregate value for all users taking part in a review, while **Time in Review** is counted for each separate user.

Reviewer Time and **Author Time** are subsets of Total Person-Time, limited to the time that was spent in the reviewer and author roles, respectively.

Defect Count

How many defects did we find during this review? Because reviewers explicitly create defects during reviews, it is easy for the server to maintain a count of how many defects were found.

Furthermore, the system administrator can establish any number of [custom fields](#)^[235] for each defect, usually in the form of a drop-down list. This can be used to subdivide defects by severity, type, phase-injected, and so on.

File Count

How many files did we review? Usually the [LOC metric](#)^[866] is a better measure of "how much did we review," but sometimes having both LOC and number of files is helpful together.

For example, a review of 100 files, each with a one-line change, is quite different from a review of one file with 100 lines changed. In the former case, this might be a relatively simple refactoring; with tool support, this might require only a brief scan by a human. In the latter case, several methods might have been added or rewritten; this would require much more attention from a reviewer.

Wall-Clock Time, Review Wall-Clock Duration

How much time has passed since the review was created and till the review was completed (or now, if the review is still in progress). This is a useful metric if you want to make sure all reviews are completed in a timely manner.

10.6 Metrics: Analysis

It is fine to collect metrics, but what do they tell us? It is tempting to apply them in many different contexts, but when are metrics telling us something and when are we reading too much into the numbers?

Defect Density

Defect Density is computed by: (number of defects) / (1000 lines of code).

This is the number of defects found, normalized to a unit amount of code. 1000 lines of code, or "kLOC" is often used as a standard base measure. The higher the defect density, the more defects you are uncovering.

It is impossible to give an "expected" value for defect density. Mature, stable code might have defect densities as low as 5 defects/kLOC; new code written by junior developers may have 100-200.

What can defect density tell us?

Let's make an experiment. We take a reviewer and have him inspect many different source files. Source files vary in size from 50 lines to 2000 lines. The reviewer inspects about 200 lines at a time so as not to get tired. We will record the number of defects found for each file.

What would we expect to find? First, longer files ought to have more defects than shorter ones, simply because there is more code. More code means more that could go wrong. Second, some files should contain more defects than others because they are "risky" -- maybe because they are complex, or because their routines are difficult to unit-test, or because their routines are reused by most of the system and therefore must be very accurately specified and implemented.

If we measure defect density here, we handle the first effect by normalizing "number of defects" to the amount of code under review, so now we can sensibly compare small and large files. So the remaining variation in defect density might have a lot to do with the file's "risk" in the system. This is, in fact, the effect we find from experiments in the field.

So defect density can, among other things, determine which files are risky, which in turn might help you plan how much code review, design work, testing, and time to allocate when modifying one of those files.

Now let's make another experiment. We will take a chunk of code with 5 known algorithm bugs and give it to various reviewers. We will see how many of the defects each review can find in 20 minutes. The more defects a reviewer finds, the more effective that reviewer was at finding the defects. This is a simple way to see how effective each reviewer is at reviewing that kind of code.

Of course in real life the nature of the code and the amount of code under review varies greatly, so you cannot just look at the number of defects found in each review -- you naturally expect more defects from a 200-line change than from a 2-line change. Defect density provides this normalization so you can compare reviewers across many reviews.

If you are comparing defect density across many reviews done by a single person, you are measuring the relative "risk" of various files and modules.

Inspection Rate

Inspection Rate is computed by: $(\text{Lines of Code Reviewed}) / (\text{Total Person-Time})$.

This is a measure of how fast we review code. A sensible rate for complex code might be 100 LOC/hour; generally good reviews will be in the range of 200-500 LOC/hour. Anything 800 LOC/hour or higher indicates the reviewer has not really looked at the code -- we have found by experiment that this is too fast to actually read and critique source code.

Some managers insist that their developers try to increase their inspection rate. After all this means "review efficiency" is improving. *This is a fallacy.* In fact, the *slower* the review is, the *better* job the reviewers are doing. Careful work means taking your time.

Instead, use inspection rate to help you predict the amount of time needed to complete some code change. If you know this is roughly a "1000-line change" and your typical inspection rate is 200 LOC/hour, you can budget 5 hours for the code review step in your development.

If anything, a manager might insist on a slower inspection rate, especially on a stable branch, core module, or close to product release when everyone wants to be more careful about what changes in the code.

Inspection Rate (Changed) metric counts only lines of code that were changed (added, removed, or modified).

Inspection Rate (Uploaded) metric counts only lines of code that were uploaded in the review.

Defect Rate

Defect Rate is computed by: $(\text{Number of defects}) / (\text{Total Person-Time})$.

This is the speed at which reviewers uncover defects in code. Typical values range between 5 and 20 defects/hour, possibly less for mature code, but not usually much greater.

The same caveats about encouraging faster or slower inspection rates apply also to defect rates. Read the Inspection Rate section for details.

Metrics Applied

If we have learned one thing about metrics and code review it is: *Every group is different, but most groups are self-consistent*. This means that metrics and trends that apply to one group do not necessarily apply to another, but within a single group metrics are usually fairly consistent.

This between-group difference can be attributed to the myriad of variables that enter into software development: The background, experience, and domain knowledge of the authors and reviewers, programming languages and libraries, development patterns at different stages of a product's life-cycle, project management techniques, local culture, the number of developers on the team, whether the team members are physically together or separate, and so forth.

10.7 Tips and Tricks

This section will describe workarounds and tricks we use for Collaborator.

Picking reviews through the Command-Line Client

When sending files to a review through the Command-Line Client, use "last" instead of the review ID to pick the last review or "ask" to be prompted with choices to pick.

Custom Fields with Date and Times

Collaborator does not have date or time custom fields, but you can closely approximate a date or time by using regular expression validation of single line text fields. For dates, the following regular expression requires a date in the 20th or 21st century that is approximately valid (yes, it accepts 31 days each month):

```
(?:19|20)\d\d-(?:0[1-9]|1[012])-(?:0[1-9]|[12][0-9]|3[01])
```

The following regular expression validates a time on a 24 hour clock:

```
(?:[01][0-9]|2[0-3]):[0-5][0-9]
```

The two could be combined to accept a date and time field. Be sure you set the description of the field to describe exactly the format you are looking for so that users do not have to parse the regular expression to know what to enter.

10.8 Improving Performance

If your Collaborator server is not working as fast as you would like there are a couple of things you can try:

- 1) Use a modern browser. The latest versions of Internet Explorer, Firefox, Chrome, and Safari all render much faster.

- 2) Make your reviews a reasonable size. Collaborator supports a wide range of review sizes, but reviews that are larger than 10x our recommended [optimal size](#)^[865] can become uncomfortably slow.
- 3) Make sure your database is fast. Collaborator spends much of its time accessing the database, so this needs to be as fast as possible. If the database is not located on the same physical server as Collaborator, make the network connection to the database as fast as possible.
- 4) Try a different database. Embedded database is convenient for small environments, but with larger databases (~100k reviews or more) you should use external database: [MySQL](#)^[60], [SQL Server](#)^[63] or [Oracle](#)^[66].
- 5) Tune the server parameters. Try increasing the [maximum heap size](#)^[1092] and/or tweaking the sizes of the various server caches.

11 Appendices

[Appendix A: Known Issues & Errata](#)^[872]

Current known issues in the server and various client components, including integrations with other systems.

[Appendix B: Version History](#)^[876]

Complete version history for each public release of the various components.

[Appendix C: Java VM Options](#)^[1092]

Overview of Java options useful for Collaborator configuration.

[Appendix D: Java Compatibility Matrix](#)^[1102]

Describes which versions of Java environment are required to run different versions of Collaborator.

11.1 Appendix A: Known Issues

These are the major known issues currently known for all Collaborator components.

Many of the issues have workarounds; those are given here as well.

Get notified automatically when a new version is available!

SmartBear announces new publicly-available versions of Collaborator at our forum located at:

<http://community.smartbear.com/t5/Collaborator/Collaborator-Release-Notifications/td-p/97024>

Known Issues with the Collaborator

- Currently, the default SCM configuration chosen on the SCM page of the [Visual Studio Extension's Options dialog](#)^[507] does not synchronize with the SCM system specified via the `collab set scm` command. Avoid calling SCM commands simultaneously from the Visual Studio Extension and from the Command-Line Client.
- If a push or merge request in GitLab affects more than 200 files, the integration will process only first 200 files from the request and add those files to a review. This is caused by the limitation on the GitLab API side.
- Dump for a single review could include remote system data from the interconnected reviews as well.
- The built-in PDF viewer of Windows 8, 8.1 and 10 do not support overlay layers in PDF files. Collaborator uses such layers to render [coordinate comments \(pushpins\)](#)^[382] in PDF versions of review materials for [archived reviews](#)^[153]. Because of this, pushpins will not be displayed if the PDF file from the archive is opened in the built-in PDF viewer of Windows 8, 8.1 and 10. As a workaround, please install the Adobe Acrobat Reader or any other full-featured PDF viewer.
- Excel files with high column counts may cause severe performance degradation when viewed in the Collaborator web application (for example, for review of differences). Depending on the processor and memory resources of the client machine, this may be noticed at varying numbers of column counts. For a typical desktop, experimentally we have noticed that approximately 500 columns is where performance begins to suffer noticeably and 3000 columns is the point at which it becomes infeasible to effectively work with the Excel file in question.
- Double quote characters (") in custom field names may break Oracle reporting views. Custom field names become column headers in the views, and Oracle does not allow double quotes in column names. Because of this, Collaborator removes double quote characters from the names of custom fields when it creates reporting views for Oracle databases. If some custom field names differ only by double quotes this would result in an "ORA-00957: duplicate column name" error in server logs. To resolve the issue, you may either remove one of duplicate column names from the reporting view, or rename the custom fields to avoid coincidence.
- Loading large dump files to Oracle may take up to a full day to complete. This appears to be an issue with Oracle driver and is under investigation.
- On Oracle databases, Collaborator does not search the contents of custom fields by default (since this significantly reduces search performance). Instead, the search results page display additional fields that define in what areas to perform new search. In this panel you can enable searching in custom fields.

- When uploading .doc and .docx files, the 'Track Changes' feature is not supported. If you do not want to see all of the content from all versions, you will need to accept all of the changes in the document before adding it to the review.
- If the installer cannot find a JRE on your system, it will prompt you for the location of a suitable JRE. On systems with multiple JREs installed, it may be necessary to specify to the installer which JRE should be used for Collaborator. On Windows platforms, running the installer with the `-manual` argument will suppress the JRE search and cause the installer to prompt for the JRE location (specifically, java.exe). On *nix platforms, you can specify the JRE location by setting the `INSTALL4J_JAVA_HOME_OVERRIDE` environment variable to the `JAVA_HOME` value.

Known Issues with the Server Component

- When the server is running on Linux systems, there can be issues with unavailable fonts or available fonts with sufficiently different font metrics that can cause the reporting engine to not render content. Workaround: Install the Microsoft True Type fonts (msttcorefonts on Debian-based systems).
- Collaborator server 12.0 and later does not install on Windows Server 2008 unless Oracle JRE is installed beforehand. If no Java is pre-installed, server installer tries to install OpenJDK which does not support Windows Server 2008.
- If your charts are not being displayed, verify that `<collab server install dir>/tomcat/temp` exists and is writable by the user that runs the server.

Known Issues with the Web Client

- Search results may not return all results without noting the truncation. This can happen if many results match the search but are inaccessible to the user.
- Home screen cannot display more than 999 open reviews.
- Custom reports with a large number of active columns or filters; or with long filter text can break the bookmark, SQL, Printable, and CSV links in Internet Explorer. Because the links contain all the filter information, the URL's can exceed the IE's maximum URL length (2083 characters).
Workaround: Use Firefox or Chrome for complex reports
- Character set differences that change the location or number of line breaks can change the way comments get promoted.
Workaround: If necessary, use the auto-detected character set to make comments and mark conversations read.
- Character set differences that change the location or number of line breaks result in metrics that may not be perfectly correct. The metrics for files are computed using the auto-detected character set.

- If there are multiple files with the same filename (but different paths) in a review the automatically linked filenames in review text (custom fields, chat, and so forth) may not link to the intended file.

Known Issues with Anti-Virus Software

- Anti-virus software is known to interfere with launching sub-processes and communicating with SCM clients. If you experience any problems with a Collaborator client hanging or getting unexpected results, and you have anti-virus software running, disable the anti-virus software and try reproducing the problem. If you subsequently contact technical support, let them know that you have anti-virus software running.

Known Issues with the Command-Line Client⁴⁴⁵

- Control Characters in text are replaced with the Unicode Replacement Character. This is most often encountered with smart quotes pasted into changelist descriptions.

Known Issues with the GUI Client⁴³⁵

- Because of technical issue with GTK3, GUI Client on Unix/Linux operating systems may fail to display table data on Add Changelists, Add Commits, Add Transactions and similar pages.
- Git users on Windows systems may need to modify their path to allow the client to detect their SCM. The default Windows system PATH entry defaults to "...git\cmd". Changing this to "...git\bin" should allow the client to properly detect the SCM when the client is launched from the tray notifier.
- If your PTC Integrity server uses IPv6 connection, GUI Client cannot map the server host name. To workaround the issue, you will need to add the IPv6 address of your server to the hosts file on your machine. The hosts file resides at "/etc/environment/hosts" on Unix and at "%SystemRoot%\System32\drivers\etc\hosts" on Windows.

Known Issues with the Eclipse Plug-in⁴⁶⁴

- Conversations View in Eclipse Oxygen does not split long line of text into multiple lines, because of this a horizontal scroll bar can appear if your conversation of checklist item contains long text.
- Collaborator Eclipse Plug-in is shipped with the Google Guava library version 20. Other Eclipse plug-ins may use another versions of this library and in some rare cases this may cause dependency conflicts.

Known Issues with Subversion Integration⁷¹⁰

- Directory entries are ignored - so adding an entire directory does not show up in a review.

- Symlinks are not supported pre-commit - a Symlink uploaded pre-commit will show invalid content in a review.

Known Issues with Team Foundation Server Integration⁶⁵³

- "Unable to determine the source control server" error can occur when adding modified files. There must be a corresponding Team Foundation Server working folder for the directory configured in the GUI client, or the directory specified for the command line client to avoid this error.
- Team Foundation Server integration will not work with non-English installations of Visual Studio.NET. Regional settings for other locales are supported, but installing a non-English Visual Studio prevents correct parsing of `tf.exe` output.

Known Issues with JIRA Integration⁷⁸⁷

- Currently, Collaborator cannot populate values of arbitrary custom fields. If your JIRA server requires certain custom fields to be set during the creation of tickets/items, then Collaborator will be unable to create new tickets/items.
- Due to technical issues, JIRA 7 cannot display the "Review Information" block automatically. As a workaround you can manually make the Review Id, Review Participants, Review Phase and Review Link fields be visible on your JIRA screens.

11.2 Appendix B: Version History

Get notified automatically when a new version is available!

SmartBear announces new publicly-available versions of Collaborator using a forum thread.

If you want to subscribe to the Release Notification thread to get all release notifications, you can do so here:

<http://community.smartbear.com/t5/Collaborator/Collaborator-Release-Notifications/td-p/97024>

Links to individual versions:

- [Version 12](#)⁸⁷⁷
- [Version 11](#)⁸⁸¹
- [Version 10](#)⁹⁰⁷
- [Version 9](#)⁹¹³

- [Version 8](#) ^[923]
- [Version 7](#) ^[945]
- [Version 6](#) ^[964]
- [Version 5](#) ^[988]
- [Version 4](#) ^[1014]
- [Version 2](#) ^[1048]
- [Version 2](#) ^[1067]
- [Version 0/Alpha](#) ^[1087]

11.2.1 Version 12

12.1.12101 - August 19, 2019

New Features

added - Collaborator now caches results of some remote repository API calls (commits, pull request diffs, commit diffs). This will decrease the overall number of calls to repository hosting servers, and reduces chances to hit the server's rate limit. (COLLAB-5913)

Bug Fixes

fixed - Integration issues with on-premises GitLab instances. (COLLAB-6012)

fixed - Errors when converting Office documents to PDF. (COLLAB-5719)

fixed - A database conversion issue when upgrading from v. 11.3.11301 to 12.x related to certain Bitbucket Server configurations. (COLLAB-5915)

fixed - An incorrect loading order of Collaborator modules on some Unix/Linux systems that resulted in the SAML service not starting up. (COLLAB-5510)

12.1.12100 - August 1, 2019

New Features

added - Pagination controls and group search filters to Admin > Groups page. (COLLAB-5679)

added - Remote System Integrations: Decrease number of API calls for getting file content. (COLLAB-5669)

added - To diagnose issues with remote system integrations, administrators can now [enable detailed logging of remote system actions](#) ^[204]. (COLLAB-5667)

added - Filter box was added to [Action Items](#)^[307] page of Web UI. It allows quick filtering of reviews by their title, status, author and so on. (COLLAB-5074)

added - Support for SQL Server 2017 (COLLAB-4284)

Bug Fixes

fixed - Collaborator handles '@' symbol in usernames incorrectly. (COLLAB-5892)

fixed - Issue with processing non-formatted messages in Git log. (COLLAB-5741)

fixed - Cells with "Wrap text" enabled are not being shown correctly. (COLLAB-5723)

fixed - Email messages had incomplete URLs to target reviews. (COLLAB-5717)

fixed - GitHub integration: Getting info about file larger than 1Mb takes a lot of time (COLLAB-5711)

fixed - TFS Integration: Collaborator doesn't indicate deletion if the whole folder was deleted. (COLLAB-5673)

fixed - Collaborator treats folders as files and generates additional files for the "Download" WebUI feature (COLLAB-5672)

fixed - Remote Systems: respond '202 Accepted' to webhook immediately (COLLAB-5668)

12.0.12000 - July 12, 2019

New Features

- **Atlassian Crowd Single Sign-On**

Native support for Crowd OpenID single sign-on is now available. Read [Single Sign-On](#)^[124] to learn more about single sign-on authentication and [Configure Single Sign-On via Crowd OpenID](#)^[134] for detailed instructions on enabling this type of authentication. (COLLAB-4240)

- **Automatically Add Code Owners**

Now Collaborator can process CODEOWNERS files in GitHub and GitLab repositories and will add the respective code owners as participants of Collaborator reviews. (COLLAB-4880)

- **OpenJDK Support**

Collaborator now supports OpenJDK - open-source implementation of Java Development Kit. (COLLAB-4320)

- **Prompt for JDBC Driver**

When configuring [database connection](#)^[77] server installer now asks a path to JDBC driver and copies it to the appropriate location. In previous versions administrators had to copy driver files manually. (COLLAB-5489)

More improvements:

- Repository hosting integrations now have a new option that controls whether to wait for review signature before merging pull request. (COLLAB-4649)
- To diagnose license usage, administrators can now optionally display [a list of currently logged-in users](#)^[169] when a new user fails to login because there are not enough licenses. Besides they can show [a list of active floating-seat users](#)^[174] on the Licensing page of Admin UI. (COLLAB-1150, COLLAB-5723)
- 6 new commands to manage a list of group templates (templates available to group members when creating new reviews) and add child groups from Command-Line Client. (COLLAB-2681)
- The JSESSIONID cookie of Web client have been renamed to JSESSIONID_COLLAB in order to avoid XSRF conflicts with other systems. (COLLAB-5653)
- The Remote System Integrations settings were divided into two sub-categories: Repository Hosting Services and Issue-Tracking Services. (COLLAB-5506)
- Web client now displays loading indicator while performing group synchronization during login (COLLAB-4967)
- Two new options that define whether to use [secure login cookies](#)^[185] and whether to [clear them when the browser is closed](#)^[185]. (COLLAB-3698, COLLAB-3697)

Discontinued Support

- Collaborator server and clients no longer use XML-RPC API (deprecated since Collaborator 9.4).
 - ❗ Old clients are incompatible with Collaborator server 12.0 and later. To work with it, you will need to upgrade your clients to version 12.0 or later. (COLLAB-2983)
- With the release of 12.0 we no longer ship Eclipse and RTC plug-ins built with Java 7. To integrate with Collaborator you will need to upgrade to Eclipse or RTC that use Java 8.

Bug Fixes

fixed - The red flags in the admin section should show up if and only if a user is actively consuming a license. If a user is not consuming a license, then there should be no flag. (COLLAB-5816)

fixed - Synchronize number of active users and the number of consumed licenses. Update last activity even if tab is out of focus. (COLLAB-5813)

fixed - Client performance penalties while loading list of existing reviews if there are a lot of in-progress reviews. (COLLAB-5641)

fixed - Exception on loading review when "logicalVersion" parameter is null. (COLLAB-5636)

fixed - Previous versions of Collaborator were allowing users to access some of Collaborator's pages without consuming a license. An initial fix was introduced in 11502 (but not documented). It is likely that Administrators will see an increase in license consumption due to this fix. (COLLAB-5628)

fixed - The default notification state for the "Send To State²⁹⁵" user preference should be "File Activity Occurs". (COLLAB-5625)

fixed - Perforce: Using the `smartbear.ccollab.upload.ignore.binary.file` option doesn't prevent client from loading version information. (COLLAB-5618)

fixed - Remote Systems: Commits that were merged in from another feature branch could be missing in pull request review. (COLLAB-5604)

fixed - The "`ccollab addchanges new .`" command did not work for Git on Linux. (COLLAB-5603)

fixed - Bitbucket Cloud integration could reach rate limit of API calls. (COLLAB-5595)

fixed - Revise consuming licenses for JSON API calls (COLLAB-5583)

fixed - Support formatting and line breaks in the spreadsheet cells in DiffViewer. (COLLAB-5552)

fixed - Remote repository integrations cannot assign reviewers if non-default set of roles is used on Collaborator side. (COLLAB-5540)

fixed - The "Accepted" icon was dropped for files that were added to changeset but their content remain unchanged. (COLLAB-5273)

fixed - The update site of Eclipse plugin provides an older version of the plugin. (COLLAB-5095)

fixed - When LDAP group sync was disabled, Collaborator was still polling LDAP server for the list of groups. (COLLAB-4968)

fixed - When a review moved to the Rework phase, the "Wait until.." setting was reset to "Wait for Any" ignoring its previous value. (COLLAB-4961)

fixed - Several issues of VHDL syntax highlighting. (COLLAB-4602)

fixed - Eclipse Plug-in ignored the Due By Phase setting of Checklist custom fields. (COLLAB-4572)

fixed - Pressing the Test Connection button for an RTC configuration validates the RTC server connection even when the server has certificate errors. (COLLAB-4490)

fixed - Time spent in the Annotating phase was not included in Time metrics. (COLLAB-4477)

fixed - Exception on creating new review for new branch on Bitbucket server. (COLLAB-4460)

fixed - The LOC values for a modified file added by command line are calculated as if the file is new. (COLLAB-4454)

fixed - Performance issue while editing groups or viewing user list when there are more than 30K users (COLLAB-3911)

fixed - The GUI client cannot reliably work on Linux distributions with GTK+ 3.22. (COLLAB-3082)

fixed - Start and end dates of Content Archiving should be based on when the review was completed instead of when it was created. (COLLAB-3040)

fixed - ClearCase Remote Client: Modern CM API modules require HttpClient 4 (COLLAB-2667)

11.2.2 Version 11

11.5.11504 - July 19, 2019

added - To diagnose license usage, administrators can now optionally display a list of currently logged-in users when a new user fails to login because there are not enough licenses. Besides they can show a list of active floating-seat users on the Licensing page of Admin UI. (COLLAB-1150, COLLAB-5723)

fixed - The red flags in the admin section should show up if and only if a user is actively consuming a license. If a user is not consuming a license, then there should be no flag. (COLLAB-5816)

fixed - Synchronize number of active users and the number of consumed licenses. Update last activity even if tab is out of focus. (COLLAB-5813)

fixed – Previous versions of Collaborator were allowing users to access some of Collaborator's pages without consuming a license. An initial fix was introduced in 11502 (but not documented). It is likely that Administrators will see an increase in license consumption due to this fix. (COLLAB-5628)

11.5.11503 - May 15, 2019

added - JIRA integrations will use API tokens instead of passwords. Atlassian has deprecated password-based authentication and suggests using API tokens. To use JIRA integrations your administrator will need to generate JIRA API token and specify it in issue-tracking configuration. See [Configuring JIRA Integration](#)⁷⁸² for instructions. (COLLAB-5642)

fixed - The ccollab addchanges command failed for Git on *nix platforms (COLLAB-5603)

fixed - While making single review dump cut off data not connected with this review (COLLAB-4539)

fixed - RTC changesets linked to workitem and located in stream are lost during review creation (COLLAB-4397)

fixed - If a user had more than 1000 open reviews, home page failed to show list of reviews on SQL Server 2016 database (COLLAB-4054)

fixed - Do not enable new Automatic links in templates automatically (COLLAB-3926)

fixed - Issues with width of Files column in WEB UI (COLLAB-3361)

11.5.11502 - April 16, 2019

added - [Bitbucket Integration](#)^[735] has migrated to Bitbucket API 2.0. Bitbucket will deprecate their API 1.0 starting from April 29. You will need to upgrade to Collaborator version 11.5.11502 to continue using integration with Bitbucket. (COLLAB-5520)

added - The "Allow to reopen review" option of remote repository integrations was renamed to "Reopen review when" and now allows to control what events will reopen completed reviews. (COLLAB-4830)

fixed - The GUI client picks an incorrect shelveset after the shelvesets are sorted by date (COLLAB-5558)

fixed - In some cases Collaborator did not release license on logout (COLLAB-5529)

fixed - The comment/code change arrows are grayed out when you first open the diff viewer. (COLLAB-5485)

fixed - The update site of Eclipse plugin provides an older version of the plugin (COLLAB-5095)

fixed - NullPointerException on adding diffs from CVS repository (COLLAB-2280)

11.5.11501 - March 26, 2019

added - Update company and product logos in server and clients. (COLLAB-5099)

added - New admin setting that defines the [format of the NameIDPolicy parameter](#)^[131] in SAML authentication requests. (COLLAB-4505)

fixed - Eclipse: Cannot open files in content merge viewers of RDi V9.6 (COLLAB-5278)

fixed - Invalid GUID message displayed on attempt to select a group to which current user does not belong (COLLAB-5266)

fixed - Diff Viewer ignores newline characters when rendering cell contents (COLLAB-4906)

fixed - Renamed/moved files in TFS are not marked as deleted in Collaborator (COLLAB-4893)

fixed - Filter "Show only logged-in users" does not work when there are more than 100 users (COLLAB-4843)

fixed - Collaborator does not send the "phase - changed" notification in certain scenarios (COLLAB-4745)

fixed - Visual Studio plugin reverses the revisions in the DiffViewer (COLLAB-4102)

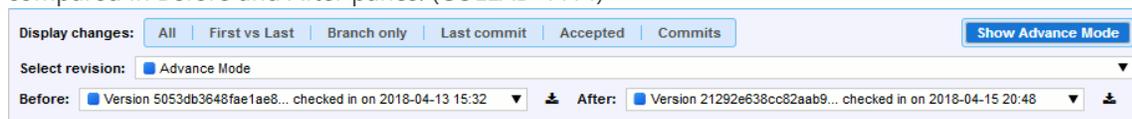
fixed - GUI Client does not sort shelvesets alphabetically (COLLAB-3093)

fixed - DiffViewer: URL link contains '​' character (COLLAB-2675)

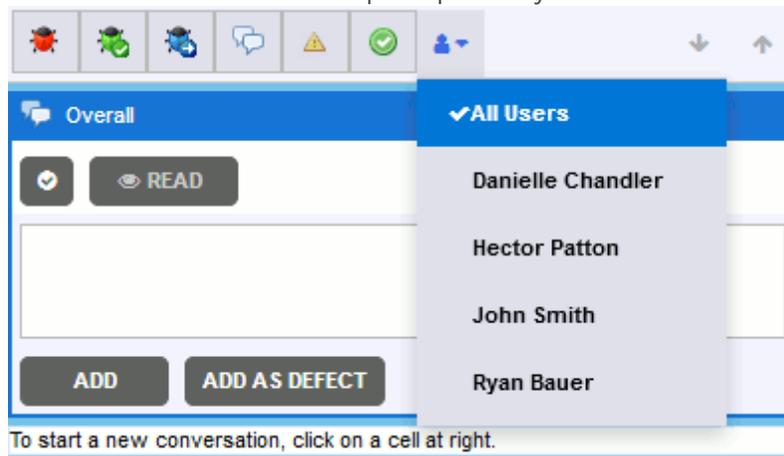
11.5.11500 - March 1, 2019

New Features:

- Now the **Display changes** selector and **Select revision** drop-down are always visible. Additionally, you can enable Advanced mode which allows manual selection of revisions to be compared in Before and After panes. (COLLAB-4414)



- Diff Viewer contents now synchronizes with the Overlay / Separate mode of Review Screen. In Overlay mode of review materials, Diff Viewer will display overall changes made to the file as specified by the *Default Revision Comparison of Diff Viewer*²⁹⁸ setting, while in Separate mode it will display changes made by a particular changeset. (COLLAB-4975)
- Diff Viewer's Chat section now has a new user-list filter that specifies whether to display comments and defects from all participants or just from the selected participant. (COLLAB-1127)



- Existing review participants will be retained upon changing group if they belong to new group. (COLLAB-5246)
- Existing values of custom fields will be retained upon changing review template if the custom field exists in both templates. (COLLAB-3815)
- Adding Git commits from GUI Client, Command-Line Client, Eclipse Plug-in or Visual Studio Extension will also add part of Git log information to build properly ordered list of changes on Collaborator server side. This will ensure that in Review Screen and Diff Viewer Git commits are displayed in the same order as in the Git log. To use this functionality you will need to update both server and clients. (COLLAB-4997, COLLAB-2717, COLLAB-1897)

- Review Screen, Diff Viewer, Eclipse Plug-in and Visual Studio Extension now display Subversion, Perforce, TFS and RTC atomic changelists in chronological order (from older to newer), regardless the order in which they have been uploaded to review. (COLLAB-4002, COLLAB-3980, COLLAB-2717, COLLAB-1897)
- New "Automatically create new groups" setting defines whether to create new groups automatically during LDAP/AD group synchronization or just map users to existing groups. Another new setting "Automatic group creation filter" specifies what exactly groups should be created automatically: if group FQDN matches the specified regular expression it will be created. Otherwise it will be excluded. (COLLAB-4238, COLLAB-4239)
- Ability to use Oracle Text component instead of regular expression query on [Oracle databases](#) ^[66] for full-text search from Web Client. This component is disabled by default, administrators can enable it on the Oracle side or through Collaborator admin UI. (COLLAB-5356)
- New [Default Scale for Documents in Diff Viewer](#) ^[300] user setting which specifies the default zoom level when reviewing documents. (COLLAB-3862)
- New [Default sent to state](#) ^[295] and [Default wait state](#) ^[294] user settings that allow specifying the default notification level for Sent To and Wait actions. Administrators can also specify these settings for the entire group via command-line and JSON API. (COLLAB-2911)

Bug Fixes

- fixed - TrayNotifier was able to login back after logging out manually (COLLAB-5214)
- fixed - Sometimes reviews containing group pool participants and custom participant fields do not open (COLLAB-5157)
- fixed - Upgrading from 11.3 to 11.4 on Oracle database did not clear existing indexes (COLLAB-5122)
- fixed - The "First vs Last" option may work incorrectly for Perforce (COLLAB-5121)
- fixed - Visual Studio Extension: Invalid .vsix certificate (COLLAB-5026)
- fixed - MacOS Client installer for 11.4.401 -11.4.402 was reported as damaged. (COLLAB-5008)
- fixed - Participant custom field validation should ignore values of other participants (COLLAB-5001, COLLAB-5232)
- fixed - Error while parsing LDAP group attributes of binary type (COLLAB-4990)
- fixed - Several issues caused by incorrect data caching in web browsers. (COLLAB-4976)
- fixed - The Accept button is disabled when uploading arbitrary diff (COLLAB-4964)
- fixed - In certain cases, file comments and defects added in "All changes" mode were not displayed in the Review Screen (COLLAB-4949)

- fixed - File renames corrupt review with Bitbucket integration (COLLAB-4947)
- fixed - Need to support TFS server workspaces in addition to local workspaces (COLLAB-4939)
- fixed - Cannot accept file changes if some of them were cherry-picked from another branch (COLLAB-4899)
- fixed - User list not displaying on Oracle 11g, Oracle 12c and MS SQL 2008 (COLLAB-4896)
- fixed - DiffViewer highlights the entire latest uploaded reversion instead of showing the actual differences in "All changes" mode (COLLAB-4889, COLLAB-4953)
- fixed - Unable to export reports to PDF or XLS (COLLAB-4866)
- fixed - In certain cases, DiffViewer did not display all actual changes unless "All changes" mode was selected (COLLAB-4810)
- fixed - Add C language schema for syntax highlighting (COLLAB-4797)
- fixed - Incorrect/empty patterns in highlighting schemas cause serious performance penalties (COLLAB-4720)
- fixed - Clicking on an existing push-pin could create a new chat instead of selecting an existing one. (COLLAB-4693)
- fixed - Collaborator fails to add comments to defect conversations which have [0,0] coordinates (COLLAB-4690)
- fixed - Collaborator fails to move broken pins, but copies them (COLLAB-4688)
- fixed - The "un-clickable" cross sign icon is shown in the "Search" field in Internet Explorer (COLLAB-4676)
- fixed - GitHub, GitLab and Bitbucket webhooks could not access Collaborator server if single sign-on was enabled (COLLAB-4662)
- fixed - Incomplete tool-tip text for "Completing the rework phase" status (COLLAB-4657)
- fixed - Cannot hide the System-wide message in the Diff Viewer (COLLAB-4655)
- fixed - Refresh action after we return back to Review Screen from DiffViewer (COLLAB-4652)
- fixed - The "Go to next location" and "Go to previous location" buttons were enabled even before the PDF page/ image was fully loaded (COLLAB-4639)
- fixed - Exception occur during Reviews by Changelist report generation (COLLAB-4638)
- fixed - Status checks on regex branches are not working (COLLAB-4621)

- fixed - DiffViewer may fail to display file changes if letter case in file-path was changed. (COLLAB-4616)
- fixed - Some issues in VHDL highlighting schema (COLLAB-4602)
- fixed - GitLab integration: Newly added files were not uploaded to review when the master branch was behind the develop branch. (COLLAB-4583)
- fixed - Pull Requests: show changes if they merged in from another feature branch (COLLAB-4525)
- fixed - ClearCase "AddVersion" command uploads only one version even when multiple versions were specified. (COLLAB-4314)
- fixed - Tray Notifier could lock out the user's account in Active Directory if incorrect credentials were specified (COLLAB-4168)
- fixed - The participant custom field should be locked from modifying by other participants (COLLAB-4059)
- fixed - Perforce: Problem with triggering files marked for adding by ensure-diffs-reviewed (COLLAB-3914)
- fixed - GUI Client "Add changes" command for Subversion ignored the selected files at first attempt to upload files (COLLAB-3609)
- fixed - Visual Studio Extension could lock out the user's account if the credentials have been changed on server-side while working in IDE (COLLAB-3371)
- fixed - Diff Viewer: Cannot select text within commented lines (COLLAB-2757)
- fixed - Comment promotion failing to detect correct line in new version (COLLAB-1382)

Discontinued Support

With the release of Collaborator 11.5, GitHub Polling integration becomes deprecated. This type of integration implies polling the GitHub server at regular time intervals to retrieve information about changes in repositories. This approach has certain time lag and has become obsolete now. We highly recommend using webhook-based GitHub integration type instead of GitHub Polling. Transfer prompt will be displayed on the Remote System Integration page of Admin UI.

11.4.11405 - March 15, 2019

added - Ability to use Oracle Text component instead of regular expression query on [Oracle databases](#) for full-text search from Web Client. This component is disabled by default, administrators can enable it on the Oracle side or through Collaborator admin UI. (COLLAB-5356)

fixed - Options for Oracle text search is shown for any database. (COLLAB-5387)

fixed - The SearchSettingsActivity should check if a customer has unsaved changes. (COLLAB-5415)

fixed - Check whether Oracle Text component is available before search. (COLLAB-5425)

fixed - Do not create Oracle CTX indices automatically during DB upgrade or fresh installation. (COLLAB-5420, COLLAB-5442)

fixed - Oracle search settings saving was fixed. (COLLAB-5421)

11.4.11404 - December 3, 2018

added - Implement VM options for pre-defined Oracle search scopes (COLLAB-5015)

fixed - The participant custom field should be locked from modifying by other participants (COLLAB-4059)

fixed - Participant custom field validation should ignore values of other participants (COLLAB-5001)

fixed - User Login Prompt is displayed only in a single line (COLLAB-4988)

fixed - Visual Studio Extension: Invalid .vsix certificate (COLLAB-5026)

11.4.11403 - November 14, 2018

added - A Java VM option to suppress revision order check-up and enable the Accept button for diff uploads. (CC-15927, COLLAB-4964)

fixed - User list not displaying after upgrade to 11.4.11400 on Oracle 11g, Oracle 12c and MS SQL 2008. (CC-15687)

11.4.11402 - October 12, 2018

fixed - Collaborator ignored the content-cache setting in the Tomcat configuration file. (CC-15676)

11.4.11401 - October 10, 2018

fixed - In certain cases, Collaborator failed to export reports in the PDF and Excel formats. (COLLAB-4866)

11.4.11400 - September 26, 2018

New Features

- **Smarter support for pull requests and rebased or squashed commits.** After a review for some pull request was created, you or your teammates continue working with your source control and continue committing changes. It is quite possible that some commits mentioned in the pull request could be rebased or several commits could be squashed into one commit. The new version of Collaborator now tracks all these changes and automatically includes or excludes commits from the review, keeping the review materials actual. This saves your time and helps you concentrate on reviewing, not on maintaining the list of materials up-to-date.
- **Support for Git submodules.** [Repository hosting integrations](#)^[736] can display changes in the submodules of tracked Git repositories.
- **Collaborator Plug-in for Bitbucket Server is no longer needed.** Starting from version 5.4 Bitbucket Server have built-in support for webhooks, so Collaborator can interact with remote repositories without this helper plug-in.
- **Custom fields in checklists.** Now you can use [custom fields](#)^[235] in [checklists](#)^[250] to adjust the review workflow to your needs in a better way.

The screenshot shows the 'Checklist' interface. On the left is a table with columns: Status, Title, User, and Date. The table contains five items, with the second item 'Get approval from developers' by John Smith on 8/2/18, 11:45 AM. On the right is a 'Checklist custom fields' panel with a 'DONE EDITING' button. This panel has two sections, each with a 'Type to filter' dropdown and a 'Notes' field. The first section has a 'No' dropdown and a note 'Consulted with Paul and Carlin.'. The second section has a 'Yes' dropdown and an empty note field.

Status	Title	User	Date
<input type="checkbox"/>	Information is correct	--	--
<input checked="" type="checkbox"/>	Get approval from developers	John Smith	8/2/18, 11:45 AM
<input type="checkbox"/>	Get approval from the subject matter experts	--	--
<input type="checkbox"/>	Changes match the company style guides	--	--
<input type="checkbox"/>	Check spelling and punctuation	--	--

- **Checklist events in the timeline.** The review timeline now includes checklist events like selection or clearing checklist items. This helps you better understand the actions review participants performed during reviewing.
- **Importing group membership from LDAP/AD servers to Collaborator for SSO logins.** If a user logs in to Collaborator using SSO, then Collaborator will search for the user name in your LDAP/Active Directory server and will automatically import groups, to which that user belongs. This feature can significantly save time needed to create user groups. The effect is especially noticeable if you have lots of users in your organization. See ["Synching User Group Membership with LDAP/Active Directory"](#)^[131] for details.
- **Support for non-default Tomcat configurations.** Earlier versions of Collaborator considered that the Collaborator Server URL consists of the host name only and has no additional part in it. So, for example, the Recent Review menu items used links like `/ui#review:id=123` to open reviews. This caused problems, if the Collaborator Server's URL was like `http://<site>/some-additional-path/`: the page's full path was like `http://<site>/some-additional-path/ui#review:id=123`, and the menu commands did not work. Collaborator 11.4.11400 supports additional paths in the Server URL, and the following server URL, for example, works fine now: `http://<my-site>/collab/`.
- **Improved server security.** We have improved internal algorithms in Collaborator Server and eliminated vulnerabilities of the following types:

- Slow HTTP headers (for GET and POST requests)
 - Cross-site request forgery
 - Unprotected directory
 - Autocompletion for sensitive forms
- **Minor releases compatibility.** Earlier, we recommended that you use the Collaborator Server and Client of exactly the same *major.minor.build* versions. We have changed that requirement, and now all matching *major.minor* versions of Servers and Clients can work together, regardless of the *build* version.
 - **Adding URLs to reviews.** You can use the **Upload > URL** command of the Review Materials menu to append URLs to reviews easily.
 - **Git LFS Support for GUI and command-line clients.** Git Large File Storage (LFS) replaces large files with text references to the files and links those to Git repository, while the file contents is stored on another server. Collaborator GUI and command-line clients now can fetch the actual files on local machine by their references and upload those files to Collaborator reviews.
 - **Improved search from command-line.** The `ccollab admin find review` command now can search for the specified text within review titles, user comments and custom fields.

- **Improved search on Oracle database.** On Oracle databases, Collaborator will no longer search the contents of custom fields by default (since this significantly reduces search performance). Instead, the search results page display additional fields that define in what areas to perform new search. In this panel you can enable searching in custom fields.

Search Results for: test

Search text:

Number of search results:

In Reviews:

- Title
- Creator
- Custom fields

In Changelists:

- Comments
- Authors
- SCM identifiers

In Files:

- File names

In Defects:

- Text
- Custom fields

In Comments:

- Conversations

- **Updated Login page** now contains links to the "Terms of Use" and "Privacy Policy" pages.
- **UI improvements:**
 - **Clearer custom fields' view.** Custom fields' descriptions are now displayed under the field labels, not under the field values:

Restrict Access:

Restrict Uploads/Deletions:

Overview:
Brief explanation of changes. *← Description of a custom field*

Product area:
Select a product area like Order Form, Start Screen, Reporting, etc. *← Overall*

- **Hiding Remote Links section.** If you do not use issue-tracker integrations or remote repository integrations, the Remote System Links section of the Review Summary Screen does not make much sense. Now administrators can control whether to display or hide this section via review template settings.
- **User Lists.** Added pagination controls and user search filters to Admin | Users page.
- **Clearer UI.** Version 11.4.14000 uses a slightly larger distance between paragraphs and sections, making it easier to read text in the General Info and Release Materials sections on the review screen.
- **Shorter commit messages.** The Changelist info section of Review Summary screen now displays only the first 70 chars of commit message by default and an ellipses button which shows the entire message.
- **Clearer reports.** Earlier, if some reviewer found an issue and clicked "Send to Rework", Collaborator displayed the "Send to Rework" string for that reviewer in reports. This might cause confusion in cases, when your workflow and Collaborator settings allow reviewers to complete a review even if some other reviewer sent it to rework. To avoid confusion in reports, in version 11.4.14000 we have changed the "Send to Rework" string to "Approved (by workflow)" in reports.

Bug Fixes

- fixed - Sometimes, the most recent commit was not added to review because of too short pull-request delay of Bitbucket integration. The default delay value was increased, and became configurable via [VM option](#)^[1092]. (CC-14194)
- fixed - After upgrading from a legacy Collaborator version, Diff Viewer does not open for some reviews. (COLLAB-4673)
- fixed - Collaborator fails to load document in the Diff Viewer if pushpins are invalid. (COLLAB-4659)
- fixed - If .doc, .docx, .pdf file types are added to the "Binary file types" list, Collaborator fails to open the files in the Diff Viewer and shows the "Cannot read property" error. (COLLAB-4648)
- fixed - Optimize Jira API calls while getting ticket summary and status (COLLAB-4629)
- fixed - The "Existing authentication configuration" setting was disabled in installer wizard. (COLLAB-4618)
- fixed - Review creation date could change while modifying other review fields (COLLAB-4556)
- fixed - When JIRA projects had coincident names (like, MYPRJ1 and PRJ1), Collaborator could append extra links to JIRA tickets to reviews. (COLLAB-4550, COLLAB-4321)

- fixed - The jackson-databind component was updated (COLLAB-4546)
- fixed - The Customizable Defect Reports did not return any results if the "Report Access" setting was set to "Respect permissions" (COLLAB-4543)
- fixed - Uninformative error message was displayed by Eclipse plugin when uploading files while Collaborator server connection was not configured yet. (COLLAB-4481)
- fixed - The Review Materials list displayed commits in different orders in the Overlay and Separate modes. (COLLAB-4394)
- fixed - the gated check-in trigger now supports TFS 2017 and 2018 (COLLAB-4392)
- fixed - The contents of review screen sections in Web UI were hard to read in edit mode. (COLLAB-4372)
- fixed - When the revision displayed in After pane was predating the revision displayed in Before pane, the Accept button was disabled without any explanation. Now the Diff Viewer shows a tooltip that explains why the button is disabled. (COLLAB-4366)
- fixed - GitHub comments were attached to wrong source lines in reviews. (COLLAB-4345)
- fixed - Issued could occur on Collaborator server deployed into a non-root location of Tomcat (COLLAB-4309)
- fixed - The user name was not displayed in footers of administrator and reports pages (COLLAB-4307)
- fixed - Custom Fields' descriptions were appended to content's field (COLLAB-4305)
- fixed - Update GitLab API. Old API became deprecated and integration stop working. (COLLAB-4301)
- fixed - In certain cases, Collaborator failed adding a user from a group to a review. (COLLAB-4272)
- fixed - In certain cases, an error occurred when you scrolled the DiffViewer window with keys. (COLLAB-4266)
- fixed - The "User List" report generated empty CSV file (COLLAB-4259)
- fixed - Collaborator fails to upload the .doc/.docx file that aren't checked out in ClearCase via the "Add Activities" mode of GUI client. (COLLAB-4244)
- fixed - Sometimes coordinate comment pairs on Before and After panes were positioned incorrectly. (COLLAB-4243)
- fixed - File subscriptions now can include repository name in file path (COLLAB-4227)

- fixed - The caption of the Defects section did not change according to the value specified in the "Defects Label (plural)" option. (COLLAB-4204)
- fixed - Temporary files were cleaned up only when Collaborator server was stopped. (COLLAB-4195)
- fixed - For mono type fonts Diff Viewer had problems with alignment of changed lines. (COLLAB-4190)
- fixed - Report results did not wrap review ID into hyperlinks to those reviews. (COLLAB-4188)
- fixed - The Defect-Custom-Fields' default values were not selected when creating defects (COLLAB-4177)
- fixed - The "User Login Prompt" was not displayed on the Login page. (COLLAB-4169)
- fixed - If the Due By Phase setting is selected for custom field, it should force users to specify a value even when the Validator setting is blank. (COLLAB-4166)
- fixed - Connections established by JIRA or [repository hosting service](#)^[735] integrations (except for GitLab) now respect [proxy settings](#)^[86] if they are specified for Collaborator server. (COLLAB-4085)
- fixed - The Accepted check-mark was not cleared when uploading a new revision of the file. (COLLAB-4025)
- fixed - Reviews created on pull requests could display incorrect differences after the original branch was merged and subsequent file revisions were uploaded. (COLLAB-3982)
- fixed - Sometimes, in reviews created on pull requests comments were displayed at wrong lines (COLLAB-3981)
- fixed - The Participants category of the Review Summary page doesn't show the Sent to Rework group and its users if the Group by State option is set. (COLLAB-3974)
- fixed - The Action Items list does not display the participant's role for users that were added via review subscriptions. (COLLAB-3950)
- fixed - Collaborator built into Visual Studio did not allow review participants to edit participant custom fields of other review participants. (COLLAB-3888)
- fixed - Some of the JSON API methods could run without the user authentication. (COLLAB-3857)
- fixed - Bitbucket Server integration could create two reviews for the same pull request. (COLLAB-3849)
- fixed - When opening a file with only single change, Diff Viewer could spontaneously switch from Expert to Simple view mode. (COLLAB-3840)

- fixed - Deleted files in the TFS changeset were not marked as "deleted" in the Review Materials section (COLLAB-3801)
- fixed - If some changes have been made both in feature branch and in upstream branch (for example, by cherry-picking), Bitbucket Server integration now mimics the behaviour of the original Bitbucket Server and ignores those simultaneous changes in Branch Only mode of DiffViewer. (COLLAB-3717)
- fixed - ClearCase integration created reviews in some custom way and didn't calculate LOC metrics. (COLLAB-3671)
- fixed - Checklist items now can contain up to 1024 characters (COLLAB-3649)
- fixed - The Login page does not prevent the browser from saving the user name and password. (COLLAB-3582)
- fixed - Updates to pull request does not reopen Collaborator review, potentially blocking merge (COLLAB-3560, COLLAB-3219)
- fixed - The Accept button was absent in Visual Studio's Diff Viewer unless at least one comment was added. (COLLAB-3485)
- fixed - GitLab integration failed to fetch subgroups and associated projects if the group name was specified (COLLAB-3232)
- fixed - Performance issues in Users page of Administrator settings when displaying more than 30K users. (COLLAB-3110)
- fixed - If commits containing changes to a file were uploaded as part of the diff range and then additional commits were uploaded to the same review and contain reverting the changes to the file, the file still appeared in the modified state in the Collaborator review (COLLAB-2737)
- fixed - Multiple tray icons could be displayed on Windows 10 (COLLAB-2691)
- fixed - The "accepted/chatting " check-mark automatically changed to "accepted" for user who has uploaded the changes (COLLAB-1488)
- fixed - When file name was matching a pattern specified for Automatic links, Collaborator applied Automatic links rather than file links (COLLAB-1415)
- fixed - The "Go to next/previous location" buttons became available before the document page was fully loaded and stuck Diff Viewer. (COLLAB-899)

11.3.11302 - March 28, 2019

- fixed - In some cases Collaborator did not release license on logout (COLLAB-5529)

11.3.11301 - May 16, 2018

fixed - Defect-Custom-Fields' default values are not selected when creating defects (COLLAB-4177)

fixed - User Login Prompt is not shown on the "Login" page (COLLAB-4169)

fixed - Collaborator Community Edition Shows a "This version of the product doesn't support external authentication" message (COLLAB-4161)

11.3.11300 - April 24, 2018

added - **Modern WebUI.** User interface of Web client^[286] have been significantly improved. Home Screen, Review Summary Screen, Diff Viewer and other pages were reworked to produce nicer look and feel and produce greater usability (COLLAB-3193)

added - **WebUI themes.** Several pre-defined UI themes that control the visual style of Web client^[286]. Administrators may specify the default WebUI theme^[174] for the entire server, while regular users can select their own preferred WebUI theme^[296] in User Preferences. (COLLAB-3316)

added - **Simplified revision selection in Diff Viewer.** New mode provides easier way to select which revisions should be compared in Diff Viewer^[344]. (COLLAB-3301)

added - **Creating bugs in JIRA issue-tracker.** Now, you can create tickets in your JIRA issue-tracker^[778] directly from the Collaborator reviews. (COLLAB-2908)

added - **Automatic user and group synchronization with LDAP and Active Directory.**^[220] Administrators now can configure user and group mapping between Collaborator and the LDAP directory or Active Directory. In this case, Collaborator will retrieve user properties (name, phone, email, and so forth) and their membership in groups when the users login. If the user or group does not exist on server, Collaborator will create it automatically. (COLLAB-1238)

added - **RTC support in Visual Studio Extension.** Now you can create reviews for RTC changesets and work items directly from Visual Studio (COLLAB-2610)

added - **Document review enhancements.** Collaborator now supports reviewing Microsoft PowerPoint presentations^[363], Microsoft Visio graphics^[366], as well as documents, spreadsheets and presentations in OpenDocument format. (COLLAB-3227)

Important: Document reviews (except for text-based and image files) is only supported on 64-bit Collaborator servers. On 32-bit platforms, Collaborator may fail to process the documents due to insufficient memory.

added - **Wildcard and regexp support in branch names.** The "Branches to track" and the "Ignore pushes for branches" settings of repository hosting configurations^[748] now accept the "*" wildcard to match all branches and regular expression to match specific branch name patterns. (COLLAB-3203)

added - Command-line and JSON API commands to manage group subscriptions (COLLAB-2800)

added - Validate support for Java 9 (COLLAB-3186)

added - New `--notification-level` parameter of the `ccollab admin user edit` and `ccollab admin group edit` commands allows managing e-mail notifications on user and group levels. (COLLAB-3111)

added - Validate support for Microsoft SQL Server 2016 (COLLAB-2683)

added - Email notification template for the review deadline change event (COLLAB-2521)

added - Validate support for Windows Server 2016 (COLLAB-2460)

added - Search-as-you-type functionality for [drop-down list](#)^[244] custom fields. That is, you may type-in first few letters of item name to narrow down the list of available items. (COLLAB-1833)

fixed - Cross-site scripting vulnerability of Log-in page (COLLAB-3696)

fixed - Excel: Need to support colors and text formatting (COLLAB-3624, COLLAB-2352)

fixed - Perforce addchangelist new throws error if "Overview" custom field is disabled. (COLLAB-3606)

fixed - Add warning to Eclipse when changing templates (COLLAB-3600)

fixed - Need to implement additional logic for deleted files in history (COLLAB-3577)

fixed - Remote Integrations: changes lost while processing merge commit with specific history (COLLAB-3563)

fixed - Cannot add materials from Visual Studio plugin when using collection URL with a space in the name (COLLAB-3554)

fixed - Team Edition: Full reporting functionality (COLLAB-3447)

fixed - Truly disable news with `-Dsmartbear.news.disable=true` (COLLAB-3434)

fixed - Fix SSO Assertions, etc for NASA (COLLAB-3381)

fixed - Chat links do not recognize filenames correctly (COLLAB-3360)

fixed - Typo in Visual Studio plugin "chagesets" (COLLAB-3356)

fixed - Eclipse client cannot open a perspective (COLLAB-3343)

fixed - Java 9: We ignore Java 9 on machine (COLLAB-3287)

fixed - The "Respect permissions" value of "Report access" setting was ignored (COLLAB-3281)

- fixed - Put the defect ID between the bug icon and the defect description (COLLAB-3280)
- fixed - Re-position screen when adding defect so Add Defect box does not get clipped (COLLAB-3277)
- fixed - The completed Review is not shown in "Completed" in the Home Page (COLLAB-3248, COLLAB-3183)
- fixed - Diff Viewer displayed collapsed references in documents as expanded (COLLAB-3202)
- fixed - Insecure request redirect (COLLAB-3160)
- fixed - Visual Studio plug-in: We should use only one user for searching TFS shelvesets (COLLAB-3112, COLLAB-3531)
- fixed - Perforce: Content triggers should ignore BOM in files (COLLAB-3074)
- fixed - Handle uncaught JavaScript errors (COLLAB-3072)
- fixed - Diff Viewer: Word file which contains charts cannot be opened (COLLAB-3036)
- fixed - Cannot add changelist because of configpath issue in PTC MKS integrity (COLLAB-2992)
- fixed - GUI Client crashes on Linux (COLLAB-2979)
- fixed - Diff Viewer is not displaying the line numbers correctly. (COLLAB-2963)
- fixed - Server can still set malformed V6_CLIENT_LOGIN_TICKET_HEADER (COLLAB-2962)
- fixed - Eclipse plugin does not work if Subversive plugin is installed (COLLAB-2948)
- fixed - Syntax Highlighting: The "New Pattern" command modifies existing pattern (COLLAB-2927)
- fixed - JSON API: Problem with processing document conversion errors (COLLAB-2878)
- fixed - Permanent descriptions for custom fields (COLLAB-2867)
- fixed - Sometimes comments are marked as read in Diff Viewer and as unread in Review Summary. (COLLAB-2835)
- fixed - Tray Notifier requires an access to the cacerts file to establish HTTPS connections (COLLAB-2756)
- fixed - "Untitled Review" Notification sent by the system to author/creator of the review (COLLAB-2744)
- fixed - Reports: 'CSV' retrieves data which does not belong to a report (COLLAB-2734)
- fixed - Minimizing Diff Viewer window should not hide its buttons (COLLAB-2656)

fixed - File subscriber who does not belong to a group is added to a review having "Group Based" access restriction. (COLLAB-2587)

fixed - Review Custom Fields: Drop-down series limited by 51200 symbols (COLLAB-2552)

fixed - Defect custom fields are not aligned and resizable (COLLAB-2547)

fixed - Automatic links of URLs do not convert trailing slashes (COLLAB-2530)

fixed - User receives notification when P4V creates a review even with 'Minimal' notification level. (COLLAB-2514)

fixed - javax.net.ssl.SSLHandshakeException if you connect to https collaborator server (COLLAB-2508)

fixed - Improper "Review complete" notification because "Accepted" comments were treated as unread comments. (COLLAB-2457)

fixed - iCal Everyone: Validator for Start/End date/time should be added (COLLAB-2448)

fixed - Spreadsheets: Merged cells are unreadable in Diff Viewer (COLLAB-2088)

fixed - Collaborator cannot convert certain types of images embedded into Word document (COLLAB-1858)

fixed - Eclipse 4.5: Mouse scrolling does not work in editor windows due to Focus change (COLLAB-1290)

fixed - Now reviewers in "waiting" state will receive notifications of other participant/author activity during the Rework phase, by default. (in previous versions they did not). New VM option was added that controls whether "waiting" reviewers will get notifications in this case or not. (COLLAB-1063)

Discontinued Support

With the release of Collaborator 11.3, we will no longer support Microsoft Internet Explorer versions 8.x. and 9.x. Besides, the Eclipse Plug-in will no longer support integration via the Subversive plug-in versions 3.x.

11.2.11201 - November 24, 2017

added - [In-product chat](#) . To help trial users get started with the product faster and shorten the learning period, we added a new Chat panel to Collaborator. Trial users can speak with SmartBear engineers here. To start a conversation, click the Chat button in the bottom-right corner of Collaborator Web Interface and enter your message. (COLLAB-3399)

fixed - Fixed integration with GitLab v10.1.1 (COLLAB-3424)

fixed - Fix BitBucket integration for non-standard domain root/context path (COLLAB-3421)

fixed - Fix upgrade issue with bad pushpin data (COLLAB-3350)

11.2.11200 - October 10, 2017

added - Native SAMLv2 support for the web interface is now available. Read [Single Sign-On](#)^[124] to learn more about single sign-on authentication and [Configuring SSO via SAML](#)^[126] for detailed instructions on enabling SAML single sign-on. (COLLAB-1795)

added - [TFS Work Items Integration](#)^[778]. Now Collaborator can update reviews with links to Team Foundation Server work items associated with reviewed changesets/shelvesets. And vice versa, it can update TFS work items with links to reviews on corresponding changeset/shelveset. (COLLAB-3119)

added - Visual Studio Extension now share SCM configurations with GUI Client and command-line client. You can create new configurations and modify existing SCM configurations in the [Options dialog](#)^[507]. (COLLAB-3032)

added - The Getting Started wizard is now displayed when you open the Collaborator View window and the Visual Studio Extension is not yet configured. (COLLAB-2995)

added - The Remote System Links section was added to the [Review Summary Screen](#)^[529] of Visual Studio Extension and to the [Review Editor](#)^[477] of Eclipse Plug-in. This section lists all pull requests, direct pushes and issue-tracking items associated with the review, as well as the current status of those items. (COLLAB-2958, COLLAB-2959)

added - Visual Studio Extension now uses the C# TFS SDK to interact with Team Foundation Server. You can now [retrieve a list of changesets and shelvesets](#)^[519] and select them visually, rather than entering changeset IDs by hand. (COLLAB-2607, COLLAB-2608)

added - Support for Microsoft SQL Server 2016 (COLLAB-2683)

added - Debug logger was added to Visual Studio Extension (COLLAB-3050)

fixed - RTC plugin for Visual Studio created corrupted links to reviews (COLLAB-3185)

fixed - Review Pools did not receive email notifications when minimum number of participants was reached (COLLAB-3170)

fixed - The Select Team Project drop-down list of GUI Client was not sorted (COLLAB-3169)

fixed - Reviews were not created for the Bitbucket cloud repositories when the repository owner was a team (COLLAB-3163)

fixed - Disabled review templates are still available for selection in Eclipse (COLLAB-3142)

fixed - 'My Role' was not shown for 'Completed' reviews on home page (COLLAB-3128)

fixed - Web client displays a blank page after saving defect custom fields (COLLAB-3113)

fixed - Typo in Review Detail Report (COLLAB-3052)

fixed - Defect Log section contains two similar 'Date' columns (COLLAB-3035)

fixed - Visual Studio extension did not show the user name if the "Full name" field was not filled. (COLLAB-2981)

fixed - Bitbucket pull requests accumulate irrelevant build statuses from multiple reviews. (COLLAB-2915)

fixed - The "Save" button was disabled on the "Review custom fields" page in the Collaborator Team edition. (COLLAB-2762)

fixed - The "Orientation" and "Display order settings" were not saved (COLLAB-2711)

fixed - Member of review pool should have access to a review (COLLAB-2686)

fixed - Text wrapping issue in comments on the DiffViewer (COLLAB-2636)

fixed - Chat panel sometimes disappears in DiffViewer (COLLAB-1972)

Discontinued Support

With the release of Collaborator 11.2, we will no longer support the SOAP API. It was deprecated in version 9.4 and has now been removed.

11.1.11103 - November 24, 2017

fixed - Fix upgrade issue with bad pushpin data (COLLAB-3350)

fixed - Fix open redirects (COLLAB-3350)

11.1.11101 - August 13, 2017

fixed - DiffViewer: Highlighting is not in line with a content (COLLAB-3024)

11.1.11100 - August 1, 2017

fixed - During server upgrade, the installation wizard now verifies Java Database Connectivity (JDBC) drivers that your server uses to connect to MySQL, SQL Server or Oracle databases. If these are legacy JDBC drivers, the wizard removes them. In this case you may need to download and install new drivers as described in [Database Installation](#) sections. (COLLAB-2467)

added - [Template Subscriptions](#) - Users can automatically become participants in reviews having a particular template. (COLLAB-2377)

added - [Author-based subscriptions](#)^[219] and [file subscriptions](#)^[219] for Review Pools - You can now subscribe a review pool group to reviews of some particular author as well as to reviews where some particular files are reviewed. (COLLAB-1537, COLLAB-2838)

added - Ability to [archive](#)^[273] review materials that are no longer used in active reviews. This will allow to periodically reduce the size of server's content cache folder which stores all review materials. (COLLAB-1228)

added - You may now create a new review by copying any of existing reviews. This approach allows to retain some data (participant list, custom fields values, review materials) from the original review. See [Copying Previous Review](#)^[333] for details. (COLLAB-2312)

added - [JIRA Integration](#)^[778] now allows to associate issues with reviews and vice versa, hyperlink mentioned issues, move or mirror defects from Collaborator to your issue-tracking system. Previous implementation of JIRA integration, which allowed creating reviews from JIRA tickets' linked commits or using JIRA as notification channel, remains functional but was renamed to [JIRA Legacy Integration](#)^[787]. (COLLAB-2594)

added - new [Remote System Links](#)^[323] section to the Review Summary Screen. This section lists all pull requests, direct pushes and issue-tracking items associated with the review, as well as the current statuses of those items. (COLLAB-2794)

added - Support for Team Foundation Server 2017 (COLLAB-2696)

added - Collaborator Visual Studio Extension now supports for Visual Studio 2017 (COLLAB-2695)

added - Collaborator GUI and command-line clients now use TFS SDK to interact with Team Foundation Server integrations. For GUI Client this made possible to [retrieve a list of changesets](#)^[659] and select them visually, rather than entering changeset IDs by hand. (COLLAB-2606, COLLAB-2609)

added - The logic of "Visible Phase" and "Due by Phase" [custom field](#)^[235] options was re-adjusted to meet some of our customer use-cases. (COLLAB-2462)

added - Web Client now displays date and time values in "yyyy-MM-dd hh:mm" format. However, the default date and time format can be changed via [user preferences](#)^[295]. (COLLAB-792)

added - [RTC client plug-in](#)^[637] now supports RTC servers versions from 4.x to 6.03. Previously, because of RTC API changes in RTC 6.0.1, for RTC 4.x-6.0 servers you had to use one version of plug-in and another version for RTC 6.0.1 servers. (COLLAB-2579)

added - Now administrators can create a [dump with all reviews of some particular user](#)^[164] (COLLAB-2637)

fixed - GitHub, GitLab, Bitbucket Cloud: "File not found" exception occur when merging a branch where some file have been deleted in its' parent branch (COLLAB-2815)

fixed - GitHub: pull request comment not reflected in review (COLLAB-2805)

fixed - GitLab, Bitbucket Cloud: make possible to use repo clone URL in remote systems (COLLAB-2781)

fixed - Disable password autocomplete on login form (COLLAB-2723)

fixed - GitLab: Comments not added to a review (COLLAB-2718)

fixed - Git's "The file will have its original line endings in your working directory." message is not ignored (COLLAB-2707)

fixed - Oracle: Slow search in CLOBs (COLLAB-2692)

fixed - The "Respect permissions" value of "Report access" setting was ignored (COLLAB-2687)

fixed - Poking a user in Annotating phase makes that Review invisible to that user under my reviews from the Collaborator Homepage (COLLAB-2679)

fixed - Bitbucket Server commit may contain no more than 25 files, Bitbucket Cloud commit may contain no more than 10 files (COLLAB-2662)

fixed - Redesign addchangelist flow for Perforce, remove redundant use of "p4 change" command (COLLAB-2654)

fixed - Visual Studio Extension does not support line comments for .cshtml files (COLLAB-2633)

fixed - Cannot upload .doc and .docx files if they are added to the "Binary file" list (COLLAB-2597)

fixed - Cannot restore dump file with huge .xml files in it (COLLAB-2593)

fixed - Perforce: the update-changelist trigger does not use the most recent review for description (COLLAB-2583)

fixed - Large Oracle database may cause Home Screen performance issue while loading action items (COLLAB-2578)

fixed - PDF's in Diff Viewer blurry at 1000% Magnification (COLLAB-2565)

fixed - The "ccollab admin wget" command-line command allows to archive reviews for users who have no access to this review (COLLAB-2540)

fixed - There's no option to drop the --devpath argument usage while in PTC integration (COLLAB-2526)

fixed - The [Supported Character Sets] link does not work (COLLAB-2501)

fixed - The default review template value for groups is not updated (COLLAB-2499)

fixed - Reviews can move to completed by clicking Wait button first (COLLAB-2461)

- fixed - A file uploaded to Collaborator should have the same filename when it is downloaded from the DiffViewer (COLLAB-2435)
- fixed - Author should be notified if no materials are attached when begins a review (COLLAB-2335)
- fixed - Disabling Collaborator news feed causes SEVERE error entries in the error.log file (COLLAB-2332)
- fixed - Link to Collaborator review from RTC workitems is broken (COLLAB-2328)
- fixed - Email notifications does not contain SSO-compatible URLs (COLLAB-2323)
- fixed - Changing group in review resets all information (COLLAB-2300)
- fixed - The "None" item in the Default review template drop-down list does not make sense (COLLAB-2293)
- fixed - Deleting the JIRA Project custom field does not delete the field's items (COLLAB-2279)
- fixed - Incorrect order of files displayed in the Diff Viewer (COLLAB-2167)
- fixed - "Add Perforce diffs" command incorrectly marks files as deleted/added (COLLAB-2027)
- fixed - "Save to ZIP" creates "0" size report (COLLAB-1978)
- fixed - Eclipse: Collaborator perspective hangs up (COLLAB-1938)
- fixed - Command-line commands fail to find users with numerical logins (COLLAB-1877)
- fixed - RTC: Wrong order for loading collab server jar files by Tomcat 8 (COLLAB-1855)
- fixed - ccollab admin review-xml command does not return the deadline value (COLLAB-1848)
- fixed - Moving review to another phase does not change "Author" state (COLLAB-1794)
- fixed - Incorrect locations of pushpin defects in CSV Reports (COLLAB-1768)
- fixed - P4DashGParser cannot parse changelists with huge descriptions (COLLAB-1688)
- fixed - When non-standard role configuration is used, reviewers may need to approve the same review twice (COLLAB-1673)
- fixed - Participant state was shown as "Approved" even if he has sent a review to rework (COLLAB-1436)
- fixed - Participant drop down does not show full list of users when this list is too long (COLLAB-1205)
- fixed - Better resolution for documents in DiffViewer (COLLAB-709)

Discontinued Support

With the release of Collaborator 11.1, we will no longer support uploading URL's as review materials.

11.0.11000 - March 7, 2017

* FIRST RELEASE OF v11.0! *

New Features

- **GitHub, GitLab and Bitbucket**

In this release we are introducing support for GitHub, GitLab and Bitbucket. Our integration support allows for users to easily create Collaborator reviews whenever a pull request is initiated. In addition to creating the review, Collaborator can merge the pull request or close its branch once the Collaborator review is completed. Finally, we've made it easier to add repositories by basing their management off of webhooks.

See [Repository Hosting Service Integrations](#)^[735]

- **Custom Syntax Highlighting Schemes**

Collaborator has always supported syntax highlighting for a number of languages. However, this latest release adds the ability to create custom syntax highlighting schemes. This change now allows Collaborator to support syntax highlighting for any language. To learn how to create custom syntax highlighting schemes, read [Syntax Highlighting](#)^[277].

- **Document Review Improvements**

In Collaborator 11.0, users can now Pan, Zoom and Scroll using their mouse. The addition of these features makes reviewing both documents and images easier and more intuitive. [Diff Viewer](#)^[342] was reworked to support these mouse actions.

- **Hide Files Under Review**

Often times changelists include files that do not necessarily need to be reviewed. Though they do not need to be reviewed, they are still part of an atomic changelist and cannot be deleted from the review. Hide Files allows users to selectively determine which files are displayed on the Review Summary screen. Read, [Hiding Files From Review](#)^[337] to learn how to use this feature.

More improvements:

- Collaborator now support file paths up to 1024 characters long. Earlier versions have file path limitation of 255 characters. (COLLAB-1459)
- "Triggers > Executable" and "Triggers > Parameters" fields now can be up to 1024 and 2048 characters long, respectively. (COLLAB-1692)

- Upgrade pdfbox library to 2.0.4 (COLLAB-2115)
- A new VM option¹⁰⁹⁹ that instructs Collaborator to use LIKE predicate instead of REGEXP_LIKE predicate in queries to Oracle database. REGEXP_LIKE predicate works slower and may cause performance issues on large Oracle databases. (COLLAB-2543)

Discontinued Support

With the release of Collaborator 11.0, we will no longer be supporting Collaborator versions 9.x and older.

Bug Fixes

- fixed - Remove "abandon" DB options added as part of the upgrade to Tomcat 8 (COLLAB-2545)
- fixed - Tomcat 8 is scanning all files in the content-cache, causing extended server start times (COLLAB-2544)
- fixed - Running ccollab admin group sync causes NPE in 10.2 (COLLAB-2430)
- fixed - Impossible to save state for "Restrict Access to Review" option (COLLAB-2340)
- fixed - Problem with navigating between Review Materials and Diff Viewer (COLLAB-2317)
- fixed - JSON API should create only one changeset when multiple files changed (COLLAB-2313)
- fixed - "Newline" replaced with '#13;#10;' after migration (COLLAB-2304)
- fixed - Multi-select custom fields do not list all selected values (COLLAB-2242)
- fixed - External Diff Launcher crashes with "java.lang.NoClassDefFoundError" (COLLAB-2236)
- fixed - Long defect text and multiple defect custom fields can push the General Info page's bounds out of the browser's window (COLLAB-2210)
- fixed - "ccollab addchangelist ask" cannot authenticate (COLLAB-2194)
- fixed - Remove redundant log error message from RemoteSystemTrigger (COLLAB-2179)
- fixed - CLI 'ccollab addfiles' sends notification to 'Author' (COLLAB-2176)
- fixed - Typo "You are pocked" in VS Extension (COLLAB-2173)
- fixed - Github: Upgrade to 10.1 produces exception when completing review (COLLAB-2151)
- fixed - RTC: Link between RTC and Collab Review (COLLAB-2140)
- fixed - 'Admin > General > Select Group Prompt:' should be depreciated (COLLAB-2003)

- fixed - Client installer fail to install CCRC jars (COLLAB-1991)
- fixed - Collaborator does not clean store-*.zip temporary files (COLLAB-1970)
- fixed - Improper diff variable values for PTC (COLLAB-1966)
- fixed - addgitdiffs added "(none)" Author to "Review materials section" (COLLAB-1947)
- fixed - Multiple authors do not receive notifications (COLLAB-1890)
- fixed - "Delete" button is still enabled after files are uploaded as separate changelists/upload processes. (COLLAB-1869)
- fixed - Detailed report does not retrieve conversation (COLLAB-1868)
- fixed - VS Extension: Use the command line client instead of the GUI client (COLLAB-1862)
- fixed - Collab GUI client cannot connect to server via HTTP proxy (COLLAB-1840)
- fixed - ccollab admin review-xml wrong metrics (COLLAB-1681)
- fixed - DiffViewer: Performance issue in case "wrap lines" unchecked and enabled "Synchronize Scrolling" (COLLAB-1595)
- fixed - Author is not notified when review is completed in case of minimal notification level (COLLAB-1561)
- fixed - Detailed Report: Add a new report to Defect Log section (COLLAB-1543)
- fixed - RTC: Separate view shows changelist(s) twice (COLLAB-1533)
- fixed - Do not allow to duplicate Group Name (COLLAB-1493)
- fixed - Improve messaging to user that an upload has failed (COLLAB-1456)
- fixed - Subscriptions mode does not work correct (COLLAB-1444)
- fixed - LOC does not correctly consider after the changes (delete or change lines). (COLLAB-1416)
- fixed - Customizable Review Reports retrieve wrong LOCs (Changed, removed, added, modified) (COLLAB-1315)
- fixed - Reviewer receives notifications when in "Active" state (COLLAB-1270)
- fixed - Long review title pushes edit buttons off the screen to the right (COLLAB-1267)
- fixed - Eclipse: Inconsistent behavior of "Delete"/"Cancel"/"Reopen" review button in Eclipse. (COLLAB-1186)
- fixed - LOC (Changed) is not calculated in "Detailed Report" (COLLAB-1184)

- fixed - LOC not matching between review materials, diff viewer and reports (COLLAB-650)

11.2.3 Version 10

10.2.10200 - December 23th, 2016

- added - Server Branding^[156] - Now Collaborator Enterprise server can display a custom company logotypes on Login, Home and Review Summary screens. Just enable the respective options and upload image files with your company logo. (COLLAB-1713)
- added - Support for Calendar notifications^[335] - You can send an iCalendar invitations to review participants. Calendar notifications may be useful for scheduling formal meetings on review. (COLLAB-1842)
- added - Deadline notifications^[270] - New type of notifications that inform about reviews approaching deadline. (COLLAB-2260)
- added - New ccollab admin find review command that allows users to search Custom Field data from command-line (COLLAB-2259)
- added - Updates in end-user license agreement (EULA) (COLLAB-2113)
- fixed - "Allow duplicate group names" impacts on "group sync" (COLLAB-1980)
- fixed - NPE when change "Allow Create Review to" == "Group Members only" (COLLAB-2282)
- fixed - Visual Studio Extension could crash the IDE when the solution files contain the characters that are not allowed in path names. (COLLAB-2156)

10.1.10101 - November 14th, 2016

- fixed - Remove date stamp from News feed (COLLAB-1996)
- fixed - GitHub integration may reach API calls rate limit and freeze till it is reset (COLLAB-2106)
- fixed - Installer fails to set admin user in ROOT.xml (COLLAB-2137)
- fixed - Fix Defect related graph in Savings Report (COLLAB-2153)
- fixed - Collaborator does not count an author in the participant list in custom templates (COLLAB-2166)
- fixed - An error may occur while upgrading server database to 10.1.10100 (COLLAB-2187)

- fixed - Collaborator does not display "Visible Phase" and "Due by Phase" options for the custom fields (COLLAB-2186, COLLAB-2188)

10.1.10100 - October 4th, 2016

- added - [Bitbucket Integration](#)^[735] - Now you can use Collaborator to review changes on Bitbucket Cloud server (COLLAB-1509)
- added - [Advanced User Permissions](#)^[211] - You may grant certain users with elevated permissions, so that they become able to perform some of administrative tasks: manage and create user groups, manage templates, custom fields, checklists, roles, automatic links (COLLAB-1229)
- added - [Savings Report](#)^[275] - New type of report that displays how much money you have saved by using Collaborator compared to non-code reviewed process (COLLAB-1951)
- added - Admin Settings have been restructured and divided into several tabs to group related items and reduce the amount of scrolling (COLLAB-1943, COLLAB-1945)
- added - Template management: default review template (COLLAB-1859)
- added - New Diagnostic function to clear up the bad pushpin data in comment and defect table (COLLAB-1813)
- added - Support for PGP signed commits in Git (COLLAB-1831)
- added - SSL implementation in JSON (client-side API handling) (COLLAB-1492)
- added - new JSON (`ReviewService.getPinCoordinates`) and CLI commands (`ccollab pinCoordinates`) for obtaining pushpin locations and numbers (COLLAB-1759)
- added - JIRA integration: Add support for creating empty reviews (COLLAB-1979)
- added - JIRA integration: Support FishEye servers that are not at the domain root (COLLAB-1876)
- added - GitHub integration: Ability to track branches like 'prefix/name' (COLLAB-2020)
- added - GitHub integration: Options to close pull request and/or delete feature branch when the corresponding review completes (COLLAB-1047)
- added - GitHub integration: checking for empty pull requests (COLLAB-1954)
- added - VS Extension: Support HTTPS connections (COLLAB-11748)

- added - VS Extension: Support "Dark" theme (COLLAB-1860)
- added - VS Extension: Support e-signatures (COLLAB-1815)
- added - RTC: Select which change set to add (COLLAB-996)
- fixed - GitHub Enterprise: SSL issue (COLLAB-2090)
- fixed - ClearCase Remote Client integration issues (COLLAB-2034)
- fixed - Obfuscating LDAP/database password issues (COLLAB-1988)
- fixed - Unix's GUI client cannot work on pure 32-bit systems (COLLAB-1956)
- fixed - Fun Fact logic on Home page was refactored (COLLAB-1940)
- fixed - Unable to create review if the 'Restrict Access to Review' setting was set to 'Participants only' (COLLAB-1937)
- fixed - VS Extension: Incorrect review state was displayed (COLLAB-1936)
- fixed - Comments/Conversation model refactoring (COLLAB-1871)
- fixed - VS Extension: Use the command line client instead of the GUI client (COLLAB-1862)
- fixed - Command "`ccollab admin user create`" throws `InternalError` if user login already exists (COLLAB-1797)
- fixed - Property "`com.smartbear.ccollab.license.noperiodicupdate`" does not function (COLLAB-1779)
- fixed - Disabled user can perform review via CLI (COLAB-1763)
- fixed - No Content-Type header in responses to UI requests (COLLAB-1706)
- fixed - PTC change packages do not include all changed files (COLLAB-1566)
- fixed - Problem with Perforce environments where both `P4CONFIG` and `P4ENVIRO` are defined (COLLAB-1545)
- fixed - Exception occurs if enter incorrect password during GUI client installation (COLLAB-1544)
- fixed - Cannot upload changelist to a review unless you are a participant (COLLAB-1407)

10.0.10001 - June 28th, 2016

- fixed - security issue in JSON API (`SessionService.getLoginTicket`). Affected versions are 9.5.9500, 9.5.9501 and 10.0.10000; all users of affected versions are urged to update to 9.5.9502/10.0.10001 as appropriate. The team would like to thank Enrique Tobis for the notice.

- fixed - Connection to GitHub Enterprise using SSL (COLLAB-1866)

10.0.10000 - June 8, 2016

* FIRST RELEASE OF v10.0! *

New Features

- Using a brand new [Collaborator extension for Microsoft Visual Studio](#)⁵⁰³, you can create and participate in Collaborator reviews directly from within the Visual Studio IDE. The extension installs into the Community, Professional and Enterprise editions of Visual Studio 2015 and 2013. The extension uses a stand-alone installer that is available for download from our web site:

. <http://support.smartbear.com/downloads/collaborator/>

- SmartBear now offers **three Collaborator editions** making it more suitable and affordable for teams of different sizes:
 - Collaborator Community (formerly named CodeReviewer) is intended for small developer teams,
 - Collaborator Team is for medium teams, and
 - Collaborator Enterprise is for large enterprise-level companies.

For complete information on differences between the editions, see the [comparison page](#)³.

• Improved GitHub support:

- Collaborator now allows viewing the whole changes history in uploaded files. You can use the Diff Viewer to look through the GitHub change lists to find out the upload history and browse differences between all versions. See [User Preferences](#)²⁹¹ to learn about different modes of the Diff Viewer.
- If you encounter any issues while working with GitHub, you can now check the log to find out the GitHub version and API endpoint information for current connection and use it for troubleshooting.

- Reviews created for push requests now have a link to the appropriate commit. In earlier versions of the product, only "pull request" reviews had such a link.
- **Enhanced Rational Team Concert support:**
 - Added support for **Rational Team Concert 6.0.1**.
 - The Collaborator plugin for Eclipse adds two [new context menu items](#)⁶¹⁸ to the Work Items view. They help you easily add files and folders associated with a work item and its child items to a review.
 - Now you can also have reviews created automatically on WorkItem status change, and attach changelists to them later.
- **Support for gated check-ins in Team Foundation Server**. Collaborator 10.0 offers two triggers that help you ensure that a review is started or completed for each changelist. See [Gated Check-in Triggers](#)⁶⁵⁹ for details.
- **Easier navigation in Diff Viewer**. In earlier versions of the product, scrolling worked only within the current page of PDF and Word documents. To switch between pages, you had to use buttons at the bottom of Diff Viewer. Now, scrolling works throughout the entire document which makes navigation faster and easier a lot.
- More improvements:
 - You can view and edit reviews' **checklists in Eclipse** now.
 - Added support for **Subversion 1.9.3**.
 - Now it is possible to obtain the list of Collaborator users and groups through API.
 - Added new [--pref-dir](#)⁴⁵⁵ global option which allows to specify a custom location of Collaborator [configuration files](#)⁴³⁴.
 - Users who are using a deprecated `--use-legacy-api` command-line argument will be notified about this at the review creation time.

Discontinued Support

The Collaborator GUI Client no longer supports the TLS v1.0 protocol.

Bug Fixes

- fixed - Collaborator Server did not delete some data on reviews when a user deleted these reviews (COLLAB-585)
- fixed - Collaborator displayed an incorrect message when a user trying viewing a file that had been deleted from a review (COLLAB-648)
- fixed - An exception occurred in ccollab.exe when the --user command-line argument was specified and the Collaborator Server used SSL connections (COLLAB-732)
- fixed - If a user uploaded several Rational Team Concert changesets and one of them was empty, the entire upload failed (COLLAB-813)
- fixed - ccollab permits login with an incorrect password, if earlier logins were successful (COLLAB-1140, COLLAB-1676)
- fixed - Collaborator formed an incorrect link for adding a bug to an external issue tracker (COLLAB-1212)
- fixed - An exception occurred when files from JGit 4 were added to a review (COLLAB-1252)
- fixed - The Review screen did not display Unicode symbols correctly (COLLAB-1304)
- fixed - The ccollab addhgdiffs command did not work (COLLAB-1308)
- fixed - Collaborator's Diff Viewer failed detecting certain changes in files and did not highlight them (COLLAB-1474)
- fixed - The Diff Viewer did not render some PDF files correctly (COLLAB-1525)
- fixed - GitHub integration: the Diff Viewer's list of revisions could differ from the list of uploaded versions (COLLAB-1425)
- fixed - GitHub integration: if you created a pull request and a review after merging change from the master branch to your branch, the review also included the "merged" files from the master branch (COLLAB-1506)
- fixed - If you uploaded the same changeset or a shelveset from Team Foundation System 2015 twice, Collaborator saw files in them as different files (COLLAB-1572)
- fixed - The Collaborator GUI Client installer copied TFS support libraries to a wrong directory. This caused certain issues with adding shelvesets to reviews (COLLAB-1672)
- fixed - The drag-and-drop file functionality did not work in Internet Explorer 10 and 11 (COLLAB-1296)

- fixed - An attempt to upload files to a review page open in Internet Explorer 9-11 could make the review page inactive (COLLAB-1619)
- fixed - Upgrading Collaborator to a newer version changed the SSL port number in server settings (COLLAB-1626)
- fixed - Some actions with Perforce changelists required administrator permissions (COLLAB-1627)
- fixed - Collaborator did not support Unicode symbols in review dumps (COLLAB-1632)
- fixed - In certain cases, ccollab.exe did not display the debug window (COLLAB-1662)
- fixed - The Diff Viewer dialog did not display unsupported file types correctly (COLLAB-1801)
- fixed - In certain cases, users could see a blank screen when logging in to Collaborator (COLLAB-1718)
- fixed - Scm config was html escaped while saving new scm in database (COLLAB-1812)
- fixed - Addon for Perforce Visual Tool could open GUI client instead of "Add Changelist to Review" dialog (COLLAB-1550)
- fixed - Add defect state to the Detailed Report (COLLAB-1404)
- fixed - Typo in the result of "ccollab admin review create" (COLLAB-1554)

11.2.4 Version 9

9.5.9502 - June 28th, 2016

- fixed - security issue in JSON API (SessionService.getLoginTicket). Affected versions are 9.5.9500, 9.5.9501 and 10.0.10000; all users of affected versions are urged to update to 9.5.9502/10.0.10001 as appropriate. The team would like to thank Enrique Tobis for the notice.

9.5.9501 - April 1st, 2016

- added - configurable polling interval for GitHub integration (COLLAB-1320)
- added - link to GitHub Pull Request in reviews created from them (COLLAB-1389)
- added - enhance diff viewer support for COBOL files (COLLAB-1528)
- fixed - spurious reviews created when GitHub and JIRA integrations simultaneously configured (dependency issue affecting JIRA triggers) (COLLAB-1600)

- fixed - legacy xmlrpc API support broken in 9.5 (COLLAB-1598)
- fixed - NullPointerException when editing non-existent review via command line (COLLAB-1557)
- fixed - PDF file not rendered properly in diff viewer (requires 3rd party library update) (COLLAB-1525)
- fixed - ensure that duplicate GitHub remote system configurations are not allowed (COLLAB-1377, COLLAB-1603)
- fixed - allow multi-line values to be passed for custom fields from the command line (COLLAB-1239)
- fixed - 9.5.9500 breaks client compatibility with some SCMs requiring native libs (e.g. TFS) (COLLAB-1618)
- fixed - Error while uploading .docx files to review materials (COLLAB-1589)

9.5.9500 - March 8, 2016

- added - Integration with [Single Sign-On servers](#)¹²⁴ (COLLAB-361)
- added - JIRA integration was improved to comply with JIRA 7 API (COLLAB-1402)
- fixed - Updated Apache Tomcat server to version 8.0.28 to resolve a number of performance and security issues (COLLAB-583)
- fixed - DiffViewer: Previous diff showing in HTML code for review sourced from JIRA (COLLAB-1477)
- fixed - ccollab admin review edit command for custom field changes group to "All Users" (COLLAB-1451)
- fixed - ccollab adddiffs does not work because of JSON API issue (COLLAB-1450)
- fixed - Doubled pushpins with wrong locations between uploaded material's versions (COLLAB-1446)
- fixed - StringIndexOutOfBoundsException being thrown from GitHub event handler (COLLAB-1440)
- fixed - Wrong child group reflection in participant drop-down (COLLAB-1434)
- fixed - "ccollab admin review edit --deadline" successfully executed with '0' in the admin settings of the UI (COLLAB-1426)
- fixed - Server cannot be upgraded to 9401 because of pushpin issue (COLLAB-1421)
- fixed - MKSAPI.JAR contains an unsupported version of Apache HttpClient (COLLAB-1420)

- fixed - Client cannot parse the "p4 -G change -o" output if it contains Perforce's additional messages (COLLAB-1414)
- fixed - IllegalStateException raised when running a diagnostic (COLLAB-1403)
- fixed - Participant's filter does not correctly show an account with a blank space in the "Full name" field (COLLAB-1397)
- fixed - Review custom fields of Multi Select type are not highlighted (COLLAB-1374)
- fixed - "ccollab admin review finish ask" does not work properly (COLLAB-1363)
- fixed - Cannot execute addchangelist if password is omitted (COLLAB-1340)
- fixed - CMVC, StarTeam, Surround, VSS and Vault support with older clients is broken on the server (COLLAB-1334)
- fixed - JSON API: UserService: login values are case insensitive (COLLAB-1327)
- fixed - Add "HTTPOnly" marker in the browsers session cookie (COLLAB-1243)
- fixed - Add "Secure" marker in the browsers session cookie (COLLAB-1242)
- fixed - "--restrict-access" parameter does not work with JSON API (COLLAB-1214)
- fixed - Wrong groupId="1" in review then creating review via GUI Client (COLLAB-1143)
- fixed - "Edit" button is grayed for uncompleted reviews (COLLAB-629)

9.4.9401 - December 16, 2015

- fixed - Unable to open file in diff viewer that was added to review by MS Word add-in (COLLAB-1393)
- fixed - improvements to GitHub pull request handling (COLLAB-1401)
- added - Digital signatures on Windows installers updated
- added - Windows and OSX installers use bundled JRE if none available (COLLAB-1392)

9.4.9400 - December 8, 2015

- added - Rejected and Cancelled reviews can also be [archived to Zip](#) ¹⁵³¹ (COLLAB-1323)
- added - Support for Rational Team Concert 6.0 (COLLAB-999)

- added - Use CSRF tokens during web transactions to prevent cross-site request forgery (COLLAB-1241)
- added - Administrators can specify a list of file types restricted for upload¹⁸⁶ (to avoid malicious file uploads) (COLLAB-1234)
- added - Filter user-input to avoid cross-site scripting vulnerability (COLLAB-1233)
- added - Commands to administer remote system integrations via Command-Line Client (COLLAB-1306)
- added - File upload security improvement. (COLLAB-1102) Web clients, by default, use an HTML5-based component for file uploads instead of the older Adobe Flash method.
- added - GitHub integration: New "Ignore pushes for branches" setting to skip review creation for raw pushes to the specified branches.
- fixed - GitHub integration: Polling thread stops if a comment exists on the pull request before Collab processes it (COLLAB-1373)
- fixed - GitHub integration creates multiple reviews with a single push to master (COLLAB-1352)
- fixed - Critical error when upgrading from 9.0 if database misses version data for some comments (COLLAB-1338)
- fixed - JSON API: UserService: login values are case insensitive (COLLAB-1327)
- fixed - Cannot click on a pushpin and have it select the conversation (COLLAB-1310)
- fixed - GitHub integration is pulling extra commits into reviews (COLLAB-1299)
- fixed - GitHub integration commits in the diff viewer show wrong timestamp (COLLAB-1298)
- fixed - Some groups are missing from the pick-list of new reviews (COLLAB-1273)
- fixed - Use TLSv1.2 protocol on Java 1.6 clients (COLLAB-1213)
- fixed - Incorrect time stamp is displayed in DiffViewer for ClearCase Activity in 9200 Client (COLLAB-1174)
- fixed - Updated Apache PDFBox library to version 1.8.10 to resolve a number of PDF-related document handling issues (COLLAB-1091)
- fixed - Eclipse client dependency for JGit makes it difficult to install into RTC Eclipse client (COLLAB-962)
- fixed - DiffViewer does not show upload number correctly when uploading git diffs multiple times (COLLAB-885)

- fixed - The --non-interactive option is ignored when SSL certificate cannot be validated (COLLAB-357)
- deprecated - Print To Review virtual printer driver - Collaborator now offers the ability to attach [Word](#)^[355], [Excel](#)^[359] and [PDF](#)^[372] documents directly to a review. Additionally, you can install Collaborator add-ins for [Word](#) and [PowerPoint](#).
- deprecated - SOAP API - Collaborator introduced a new JSON API in January 2015 and the limited SOAP API is no longer needed.
- deprecated - XML-RPC API - Collaborator's XML-RPC API is no longer needed because of the introduction of the JSON API.
- deprecated - Visual Studio Add-in - We are currently working on a new add-in that will support Visual Studio 2013 and 2015 (and, hopefully, provide a much better user experience than the existing one).

9.3.9300 - October 13, 2015

- added - Completed reviews can now be [archived to Zip](#)^[153]. (COLLAB-1105)
- added - The style of [coordinate comments and defects](#)^[382] (pushpins) have been changed.

4

Now the pushpins display an integer number in their head :  The number corresponds to the order in which that pushpin was added to the document page or image. (COLLAB-1179)

Note: During the upgrade to Collaborator 9.3 all **in-progress** reviews have been updated and their pushpins (if any) were numbered. Converting only in-progress reviews during the upgrade, ensures that upgrading the server to 9.3 does not take too long. To append ordinal numbers to pushpins in all completed reviews, your administrators can use the respective command in the Diagnostic Utility. (This however may take some time to accomplish.)

- added - Collaborator News panel in the [WebUI](#)^[267]. (COLLAB-1104) This panel displays news, release announcements, webinar invitations and other information from the SmartBear.
- added - [AES-256 encryption](#)^[100] for database and LDAP passwords. (COLLAB-1077)
- added - Send notification to the administrator when a user access was denied due to [license limit](#)^[88]. (COLLAB-985)
- added - Support for Oracle 12c database. (COLLAB-1121)
- added - Support for Microsoft Team Foundation Server 2015. (COLLAB-1144)
- added - Support for Microsoft Windows 10 (both server and client components of Collaborator). (COLLAB-1095)
- added - Support for Microsoft Edge browser in Web Client. (COLLAB-1096)
- fixed - Changes of document(s) uploaded to a review were not highlighted. (COLLAB-1145)

- fixed - JIRA Configuration did not remove the trailing slash from Server URI. (COLLAB-1138)
- fixed - Git's "The file will have its original line endings in your working directory." message was not ignored. (COLLAB-1107)
- fixed - Collaborator did not apply the ASCII expansion to Perforce wildcards. (COLLAB-1103)
- fixed - JSON API was not implemented for the "ccollab admin review-xml" command. (COLLAB-1084)
- fixed - Customer's completed reviews showed the "overdue" status. (COLLAB-1066)
- fixed - The `smartbear.ccollab.upload.ignore.binary.file` property was ignored by JSON APIs. (COLLAB-998)
- fixed - Private or non-SCM files prevented review uploads from Eclipse Plug-in. (COLLAB-945)
- fixed - The location data for defects within documents was displayed incorrectly in the Defect report. (919)
- fixed - Some users could log in even if all floating licenses was consumed. (COLLAB-694)
- fixed - The filters of the Diff Viewer's chat panel did not function properly. (COLLAB-710)
- fixed - The Before and After drop-down lists of the Diff Viewer displayed file ids rather than commit ids for GitHub files.
- fixed - Diff Viewer navigates between files alphabetically even when File View is set to "Compressed Tree". (COLLAB-389)

9.2.9200 - July 9, 2015

- added - [JIRA integration](#)⁷⁸⁷
- added - [GitHub integration](#)⁷³⁵
- added - [Electronic signatures](#)¹⁸³ can now be configured on templates basis (COLLAB-633)
- added (open source, beta): IntelliJ IDEA plugin (<https://github.com/SmartBear/idea-collaborator-plugin>)
- added - Eclipse Plug-in, GUI Client, and Command-Line Client all now use the JSON API completely and by default (to get old behavior specify `--use-legacy-api` option with Command-Line Client)
- fixed - fixed HostGUID handling by JSON API; primarily affecting Perforce environments (COLLAB-1053)
- fixed - Table naming issue in Oracle-based environments (COLLAB-1041)

- fixed - Defect marking in Eclipse conversation tab stops changing colors (COLLAB-1035)
- fixed - Action item list not refreshing after defect creation in Eclipse plugin (COLLAB-1034)
- fixed - Respect a Perforce changelist's comment when submitting it to Collaborator (COLLAB-1021)
- fixed - Diff viewer should handle empty and broken files (COLLAB-1005)
- fixed - Collab tray notifier UnsupportedOperationException error (COLLAB-1003)
- fixed - NullPointerException when ccollab addchangeslist is run with Perforce (COLLAB-966)
- fixed - Eclipse client could not create line defects (COLLAB-979)
- fixed - Failure to create new review in GUI client when debug was turned on (COLLAB-964)
- fixed - Always allow listed authors to upload content to a review, regardless of restrictions (COLLAB-959)
- fixed - Unclear GUI client error message during "test connection" if a 9.x client is used with a < 9.0 server (COLLAB-955)
- fixed - Improved client support for copy-participants operation (COLLAB-954)
- fixed - Improved client support for saving defect id on creation/editing (for "last" argument) (COLLAB-953)
- fixed - Made checking mandatory custom fields consistent for defect commands in CLI in both legacy and JSON API modes (COLLAB-952,1069,1070)
- fixed - Mandatory review custom field was not working for annotating phase (COLLAB-948)
- fixed - Mandatory review custom field was not made obvious with the typical red label for mandatory fields (COLLAB-947)
- fixed - Incorrect "send to completed" button and associated description for author in a "formal inspection" template review (COLLAB-937)
- fixed - Clarified docs and enhanced behavior of assignReviewPool API call (COLLAB-923)
- fixed - Made sure that review phase "Rework" always identifies as such w/ trigger substitution variables \${review.phase}/\${review.phase.previous} (COLLAB-918)
- fixed - Cannot delete .docx documents from review materials (COLLAB-878)
- fixed - addcvsdiffs does not work w/ -N cvs option; use -skipN option to addcvsdiffs if needed (COLLAB-738)
- fixed - Verify that we can run on JRE 8 (COLLAB-682)

- fixed - Perforce update-changelist trigger fails when workspace has the "Host" field specified (COLLAB-667)
- fixed - Uploading a new version of a file changed chat icons from acceptance to chat icon (COLLAB-226)

9.1.9101 - April 15, 2015

- added - New "First uploaded vs. Last uploaded" option for the Diff Viewer Default Version Comparison ²⁹⁸ setting (COLLAB-841)
- added - JSON API: Allow defects and comments to be queried by review/user (COLLAB-840)
- added - JSON API protocol implementation for trigger commands (COLLAB-799)
- added - Allow pre-configuration of scale parameters during server installation (COLLAB-884)
- fixed - Download Client Installers button points to version 8 download page (COLLAB-910)
- fixed - Infinite Loading message when clicking Next button in diff viewer (COLLAB-888)
- fixed - Mandatory review subscriptions prevent review from moving to completed phase (COLLAB-797)
- fixed - Browser launching is broken in all *nix operating systems, including mac for all client apps (COLLAB-603)
- fixed - Author receives "Respond to comments" email when all review pool slots are taken and review begins (COLLAB-601)
- fixed - AccuRev addchanges fails when getting item transaction (COLLAB-503)
- fixed - Blank default start menu folder name for client install (COLLAB-917)
- fixed - addhgdiffs command with JSON causes NullPointerException (COLLAB-886)
- fixed - addfiles command does not allow to load "local" files when SCM set to "perforce" (COLLAB-867)

9.1.9100 - March 25, 2015

- added - Most Command-Line Client commands (except for triggers) now support the `--use-json-api` global option.
- added - Support for JSON API in GUI Client. Now this API is the default for GUI Client (COLLAB-779)

- added - Support for JSON API in Eclipse Plug-in (COLLAB-855)
- added - Add participant state to the Detailed Report (COLLAB-804)
- added - Track user file activity from the Review Detail Reports (COLLAB-743)
- added - The caption of the Approve button now changes depending on the next phase (COLLAB-564)
- added - Add Collaborator to the list of web browser's search engines⁴⁰² (COLLAB-821)
- added - Support for Microsoft Internet Explorer 11 browser in Web Client. (COLLAB-818)
- fixed - Restrict upload if restrict access is set to "Yes" (COLLAB-849)
- fixed - Running the ccollab admin review create command with the --use-json-api option requires the template ID (COLLAB-848)
- fixed - Command line output for admin user create is confusing (COLLAB-833)
- fixed - ccollab logout fails on Linux (COLLAB-832)
- fixed - Eclipse client will not connect to 9.0 server (COLLAB-829)
- fixed - JSON API with addchangelist and invalid login ticket dies, instead of prompting for password (COLLAB-819)
- fixed - Reverted file are not removed from the review (COLLAB-567)
- fixed - Git/Eclipse: Cannot add multiple commits (COLLAB-811)
- fixed - RTC work item approvals do not get updated when a review is deleted in Collaborator (COLLAB-839)
- fixed - Word document-handling memory consumption issues (COLLAB-539)
- fixed - Perforce syncusers command issues; refactoring to fully support --use-json-api (COLLAB-801)

9.0.9001 - February 3, 2015

- added - JSON API: review deletion, adding urls to review, dismiss commit todo, move review to annotate (COLLAB-760)
- added - JSON API: findByGuid and getMembers added to GroupService (COLLAB-789)
- added - JSON API: findByGuid and findByLogin to UserService (COLLAB-790)

- added - JSON API: findByld and getParticipants to ReviewService (COLLAB-788)
- fixed - JSON API: fixed admin group create (COLLAB-771)
- fixed - JSON API: fixed missing Action categories (COLLAB-715)
- fixed - review pool notifications should send even if review has started (COLLAB-741)
- added - added ability to stop users from deleting review pools via vmoptions (COLLAB-780)
- fixed - handling of first git commit (COLLAB-769)
- fixed - emailing everyone now includes all members of assigned review pools (COLLAB-742)
- fixed - changed review title (COLLAB-767)
- fixed - MKS products now referred to as PTC in UI after company acquisition (COLLAB-753)
- fixed - Eclipse plugin client author field autofills (COLLAB-758)
- fixed - review xml now includes review pool data (COLLAB-580)

9.0.9000 - January 20, 2015

* FIRST RELEASE OF v9.0! *

Major features:

- [JSON API web service](#)^[842] - a fast and effective way to exchange data between your application and Collaborator server.
- Git integration with Collaborator Eclipse Plug-in
- Command-line APIs were refactored.
- Support for Visual Studio 2013, SQL Server 2014, SVN 1.8.
- [beta] Ability to move comments in [MS Word documents \(.doc and .docx\)](#)^[368], [PDFs](#)^[375] and [images](#)^[372]. Supported in Chrome and Firefox only.
- added — Command-Line Client now has the `--use-json-api` global option. If this option is specified, the Collaborator server will use a faster JSON API to execute commands.

- added — Display full path in a tooltip for truncated file path at top of diff viewer (COLLAB-452)
- fixed — Server-side debugging contains plain text passwords (COLLAB-699)
- fixed — Cannot approve a review due to unread comments, but there are no unread comments (COLLAB-721)
- fixed — CVS does not upload all the file as "cvs diff" (COLLAB-299)
- fixed — Child group loses its child relationship when modified by group admin (COLLAB-683)
- fixed — Spaces removed after PDF conversion (COLLAB-686)
- fixed — Schema check misidentifies standard Oracle triggers (COLLAB-557)
- fixed — Inviting a colleague sends an invalid link to the review (COLLAB-652)
- fixed — broken I/O behavior around password prompts (COLLAB-735)
- fixed — Changing review template wipes file-subscription's participants (COLLAB-534)
- fixed — Populated mandatory review custom field prevents review from changing phases (COLLAB-720)
- fixed — Square bracket in custom field name breaks database views in MS SQL (COLLAB-547)
- fixed — Unable to login after upgrade from v.8100.008: Logging install4j errors and ErrorCode404Handler info entries (COLLAB-56)

11.2.5 Version 8

8.5.8502 - November 11, 2014

- fixed — Coordinate locators limited to 1 million across the whole server (COLLAB-631)
- fixed — Web UI Slow loading additional lines of code when p4protects is enabled (COLLAB-634)
- added — Support for Subversive in Eclipse Luna (COLLAB-514)
- fixed — Notification Table Cleanup Task does not work (COLLAB-590)
- fixed — Action Item list retrieval is unacceptably slow (COLLAB-608)
- fixed — Add pending changelist for Perforce fails (COLLAB-656)
- fixed — Error parsing variables added as key: value in p4 set (COLLAB-651)
- fixed — Improve user message for ensure-diffs-reviewed errors (COLLAB-609)

- fixed — Disable "Delete" button when "Restrict Uploads to Review:" is set to Yes (COLLAB-661)
- fixed — Modifying and saving a local file from the diff viewer in Eclipse does not save the file to disk (COLLAB-626)
- fixed — Redact accidental inclusion of plaintext password from command-line debug log (COLLAB-616)
- fixed — Eclipse: error with svnkit 1.7+ (COLLAB-545)
- fixed — enhanced error messages from ensure-diffs-reviewed (COLLAB-609)
- fixed — clarified initial configuration screen on product installation (COLLAB-660)
- fixed — improve error messaging when git HEAD revision can not be found (COLLAB-640)
- discontinued support — we have stopped supporting the following outdated and rarely used SCMs: IBM CMVC, Borland StarTeam, Seapine Surround SCM, SourceGear Vault and Microsoft Visual Source Safe.
- Installers are now digitally signed on applicable platforms (Windows, OSX).

8.5.8501 - September 30, 2014

- feature — Allow obfuscation of LDAP passwords in ROOT.xml (COLLAB-330)
- fixed — addgitdiffs does not generate LOC metrics (COLLAB-597)
- fixed — Issue of converting pdf files with empty pages at the end (COLLAB-576)
- fixed — Mac Installer cannot find Java JRE (COLLAB-577)
- fixed — Orphaned row in assignment table breaks group admin page (COLLAB-572)
- fixed — Client Installer - Ubuntu- Installer does not create links to executables (COLLAB-559)
- fixed — Discarded MKS change packages showing in GUI client (COLLAB-252)
- fixed — PDF conversion error (COLLAB-594)

8.5.8500 - August 26, 2014

- feature — Collaborator Server now can run on MySQL version 4.1, 5.0, 5.1, 5.4, 5.5 and 5.6. (COLLAB-305)
- feature — Added syntax highlighting for XML and XAML files (COLLAB-494)

- fixed — p4 addchangelist uses too much memory when checking file integrations on some cases (COLLAB-454)
- fixed — Discarded MKS change packages showing in GUI client (COLLAB-252)
- fixed — ensure-diffs-reviewed selects contained diffs as possible conflicts (COLLAB-515)
- fixed — Prevent the uploading of certain binary files based on [Admin settings](#)^[187] and [Collaborator Client configuration](#)^[1100] (COLLAB-448)
- fixed — smartbear.ccollab.upload.truncate.size no longer works (COLLAB-440)
- fixed — Numbered/lettered bullet list adds extra spaces in diff viewer (COLLAB-469)
- fixed — Problem with php file on diff viewer due to syntax coloring display setting (COLLAB-477)
- fixed — Removed hardcoded timeout (30s) for triggers, timeout is configurable via VM option now (COLLAB-442)
- fixed — Participant custom fields cannot be modified in the completed phase (COLLAB-439)
- fixed — Defect and comment timestamp is not displayed in the Web UI on the non-compact view (COLLAB-436)
- fixed — Regression - We do not support parentless git commits on 8405, but it was supported on Collab 6507 (COLLAB-445)
- fixed — DOM error when clicking next file (COLLAB-487)
- fixed — Exception when clicking review from action items (COLLAB-486)
- fixed — Slow diff viewer refresh performance for Excel spreadsheets (COLLAB-460)
- fixed — Apparent unresponsiveness when interacting with comments in the diff viewer (COLLAB-460)
- fixed — Select Custom field with its values changed causes issue on reviews with the old values selected (COLLAB-473)
- fixed — Wrong file name and extension for review file from mercurial (COLLAB-489)
- fixed — Participant list gets truncated after 10k users (COLLAB-77)
- fixed — No action items for review pool participants (COLLAB-507)
- fixed — p4 - broken symbolic links cause issues with ensure-reviewed triggers (COLLAB-457)
- fixed — Document Diff viewer throws exception before document is finished converting (COLLAB-498)

- fixed — Support MKS Integrity 10 (COLLAB-411)
- fixed — Document conversion failure when restricted fonts are included (COLLAB-316)
- fixed — ClearCase \main\LATEST does not work anymore (COLLAB-535)
- fixed — Eclipse - Support for Subversive in Eclipse Luna (COLLAB-514)
- fixed — Update mysql jdbc driver, 5.1.6->5.1.31 (COLLAB-305)
- fixed — Review Pools: Can move a review forward without one (COLLAB-500)
- fixed — ClearCase "local" keyword does not work in Client (COLLAB-556)

8.4.8406 - June 17, 2014

- feature — Added new status for AccuRev incl/excl (COLLAB-269)
- feature — Added new setting to user roles configuration: "Minimum number required to finish review". It defines a minimum number of approval required in order to complete the review.
- fixed — Document converts incorrectly with extra lines (COLLAB-358)
- fixed — Include offending diff output on ensure-diffs-reviewed response (COLLAB-349)
- fixed — Link button in reports is saving URL's that are too large (COLLAB-435)
- fixed — Change default from 'Any Activity' to 'File Activity' (COLLAB-344)
- fixed — ensure-diffs-reviewed fails when there are shared changes between collab and the scm (COLLAB-406)
- fixed — New version of Chrome (and IE9) does not auto-scroll while typing in long diff comments (COLLAB-186)
- fixed — Workflow around Review Pools is not ideal (COLLAB-262)
- fixed — NPE in admin batch execution of adding a git changelist (COLLAB-397)
- fixed — Excel files cannot be viewed in IE8 (COLLAB-368)
- fixed — Populated and expanded defect custom fields hidden from view (COLLAB-418)
- fixed — ClearCase supports relative branch path in "AddVersions" (COLLAB-398); ClearCase should recover the input version information when error occurs (COLLAB-399); ClearCase AddVersion should provide an option to allow if unchanged CHECKOUT files are loaded (COLLAB-400), Show All Files > Branch Name not working properly (COLLAB-421), Review #10161

- fixed — Fixed Database Integrity errors and checks on the Assignment and FileMetrics tables (COLLAB-293)
- fixed — make initialization error page clearer (COLLAB-366)
- fixed — ClearCase > Add Versions > Show All Files > Branch Name not working properly (COLLAB-421)
- fixed — ClearCase supports relative branch path in "AddVersions"(COLLAB-398); ClearCase should recover the input version information when error occurs (COLLAB-399); ClearCase AddVersion should provide an option to allow if unchanged CHECKOUT files are loaded (COLLAB-400)
- fixed — Suppress stacktrace output for document conversion failure (COLLAB-331)
- fixed — Diff Viewer - Display order of after before in bottom detail pane (COLLAB-131)
- fixed — Extra spaces show up in diff viewer in IE11 (COLLAB-362)
- fixed — Perforce Server integration. Adding changelists from server bypasses user access (COLLAB-359)
- fixed — Cannot sort Defect ID column on the defect log of the review summary page (COLLAB-356)
- fixed — addfiles sends an email for each file (COLLAB-303)
- fixed — scmFindOrCreate does not send all info to the server (COLLAB-378)
- fixed — RTC - Incorrect "Pending" label on the "Add to Review" dialog (Case COLLAB-324)
- fixed — The external URL admin setting is reset when the server starts with no DB connection (COLLAB-392)
- fixed — Environment P4CLIENT overrides command's P4CLIENT on p4v (Windows) (COLLAB-369)
- fixed — Make git ignore warning: lines on stderr from commands
- fixed — AccuRev - Incorrect conversion of changelist date (COLLAB-388)
- fixed — Change default from 'Any Activity' to 'File Activity' (COLLAB-344)
- fixed — Fail to load in the dump file which contains the specific character (COLLAB-372)

8.4.8405 - May 13, 2014

- fixed — Improved performance of chat message/defect rendering for large reviews (COLLAB-313)

- fixed — Solved issue where addfiles command improperly calculated LOC metrics for non-SCM files (COLLAB-373)
- added — Made comment locations clickable in search results (COLLAB-294)

8.4.8404 - May 6, 2014

- fixed — Minimum client version set as "0" in server vs client version error message (COLLAB-308)
- fixed — License logging does not work and need to record license denials in the license.log file (COLLAB-335 & COLLAB-348)
- fixed — Notifications - Back in Inspection Phase email sent at the wrong time (COLLAB-281)
- fixed — Cannot add to existing review with Collaborator and SVN or Git (COLLAB-317)
- fixed — Replace the loading indicator (COLLAB-310)
- fixed — Non-SCM files, documents and spreadsheets are calculating LOC metrics when they should not (COLLAB-140)
- fixed — Problem with compare/sort on 1.7+ JREs (COLLAB-338)
- fixed — ClearCase Addversion fails when there is only one input version (COLLAB-353)
- fixed — License logging does not work and need to record license denials in the license.log file (COLLAB-335 & COLLAB-348)
- fixed — Calculation for number of comments in review detail report includes "accepted" comments (COLLAB-312)
- fixed — Failed uploads result in a missing path in VersionData (COLLAB-337)
- fixed — Calculation for number of comments in review detail report includes "accepted" comments (COLLAB-312)
- fixed — WebUI displays (no comment) when there is not a comment (COLLAB-346)
- fixed — Open the diff viewer with the upload in which the defect was created as the "after" version (COLLAB-133)
- fixed — Collaborator sends a notification email for each uploaded file (ClearCase) whether the file changed or not (COLLAB-325)
- fixed — First cut at resolving client date issues (COLLAB-320)
- fixed — Diff viewer gives no clear indication that reworked files are new (COLLAB-253)

- fixed — Home Displays user has no Action Items on home page before it really determines if the user has Action Items (COLLAB-136)
- fixed — RTC - Changelists are uploaded in wrong order (COLLAB-53)
- fixed — Materials section. Some of the materials disappear when switching between overlay and separate (COLLAB-49)
- fixed — RTC - Changing Work Item state re-uploads unmodified files (COLLAB-289)
- fixed — RTC - Add context menu to add delivered change sets to a review from the History view (COLLAB-307)
- fixed — Group Admins cant set the 'All Users' flag of a group to true (COLLAB-212)
- fixed — Send author inspection notice to users with notification preference set to MINIMAL (COLLAB-268)

8.4.8403 - March 25, 2014

- added — ability to obscure database passwords in ROOT.xml (COLLAB-261)
- added — admin has ability to limit subscriber role (COLLAB-57)
- fixed — Eliminated duplicate logins when trailing spaces are included (COLLAB-69)
- fixed — Fixed issue with Previous/Next diff filter (COLLAB-78)
- fixed — Authors are now notified if they are not the creator of the review (COLLAB-85)
- fixed — Memory issue with AccuRev loading (COLLAB-126)
- fixed — Issue with non-participants having certain edit permissions (COLLAB-135)
- fixed — Issue with user selecting a new template and getting error (COLLAB-142)
- fixed — Database integrity diagnostic JoinReviewChangelist error after failed web upload in IE (COLLAB-148)
- fixed — UI issue with General Info area being overwritten (COLLAB-157)
- fixed — Footer incorrect (COLLAB-166)
- fixed — Issue with Group members creating a review that includes non-Group members as the reviewer. Can't check off items in checklist (COLLAB-167)
- fixed — Lack of warning when mandatory participant is removed from a review (COLLAB-174)
- fixed — Exception error with review pools (COLLAB-176)

- fixed — P4 passwords showing in Web UI debug logs (COLLAB-178)
- fixed — ClearCase issue with addversions if there are changes in subdirectory (COLLAB-181)
- fixed — Issue with plugins newer than the server version of Eclipse (COLLAB-183)
- fixed — Get email/full name data upon account creation (COLLAB-205)
- fixed — Field not cleared after creating a group (COLLAB-210)
- fixed — Style issue in the diff viewer – breaks if the conversation is resized (COLLAB-216)
- fixed — Ensure diffs reviewed does not automatically detect merged changes (COLLAB-218)
- fixed — Raise notification subject line to 256 characters (COLLAB-222)
- fixed — List Review Stalled notification template using Review Stalled Author template (COLLAB-227)
- fixed — Fields not cleaned after creating user (COLLAB-234)
- fixed — Reviews not appearing in action items for author (COLLAB-236)
- fixed — Setting "Review template" to the same template in the command line wipes out participants (COLLAB-239)
- fixed — Unable to remove group admins using group sync (COLLAB-240)
- fixed — Review general information: Admin can see only groups where he is a member of. (COLLAB-245)
- fixed — Make all searches case insensitive (COLLAB-247)
- fixed — Memory issue with SCM.Uploadchangeset() with Subversion (COLLAB-250)
- fixed — Action item arrow is red even though no action can be done (COLLAB-254)
- fixed — Review Creator cannot edit General Info (COLLAB-271)
- fixed — GIT issue if there is a file named HEAD in the directory (COLLAB-275)
- fixed — P4 addchangelists broken for certain versions (COLLAB-286)
- fixed — Add option to allow uploading other user's perform pending changelists (COLLAB-287)
- fixed — "AddChanges" fails in CVS (COLLAB-290)
- fixed — RTC: "Save change set links and Comments" follow up is now triggered. (COLLAB-54)

- fixed — RTC: No new reviews are generated if Work Items are linked to rejected or cancelled review (COLLAB-204)
- fixed — RTC - All changesets are not uploaded if one is empty (COLLAB-279)
- fixed — RTC: "Add to Review" to be available for changesets in RTC that have been delivered (COLLAB-208)
- fixed — Clearcase: Adding changes via addchanges from parent directories cause the changes to be added as "uploaded files" (COLLAB-238)
- fixed — ClearCase addversions/addchanges fails when using relative path for Windows (COLLAB-298)

8.4.8402 - March 6, 2014

- fixed — Oracle support hotfix (COLLAB-257)

8.4.8401 - February 19, 2014

- added — ****Accepted**** messages now shown on review reports (COLLAB-38)
- added — Added comment link in search results screen (COLLAB-42)
- fixed — Calendar week starts on Monday instead of Sunday (COLLAB-15)
- fixed — Single-Review dumps contain LabelLocation records for all reviews (COLLAB-27)
- fixed — PDF Conversion causes long query warnings (COLLAB-23)
- fixed — Vertical Tab control code breaks Review-XML parser (COLLAB-25)
- fixed — Checklist records not cleaned up when Review is deleted (COLLAB-29)
- fixed — Config only dumps sometimes will not load due to false positive on Duplicate Meta-Data (COLLAB-30)
- fixed — DOCX upload never completes (COLLAB-40)
- fixed — Deleting Admin email now generates error instead of going to first run initialization screen (COLLAB-41)
- fixed — Hourly time calculations in reports stop at 24 hours instead of 30 hours now before rolling into days (COLLAB-55)
- fixed — Notification errors in some cases in Collab.log (COLLAB-24)
- fixed — Adding a review pool group to two different parent groups breaks participants list (COLLAB-76)

- fixed — MS Office graphics objects do not render in diff viewer (COLLAB-79)
- fixed — Broken keyboard shortcuts in Diff Viewer (COLLAB-90)
- fixed — Changing template in completed review causes a hang (COLLAB-112)
- fixed — Diff convos scrolled off screen when you click them (COLLAB-122)
- fixed — Could not select the participant from specific group (COLLAB-124)
- fixed — Loading AccuRev history used too much memory (COLLAB-126)
- fixed — Overview text box is now larger (COLLAB-127)
- fixed — ClearCase 'Local' does not work in 'addversions' command (COLLAB-130)
- fixed — DB import fails with "java.io.IOException: Data format error: Character reference "&#" (COLLAB-134)
- fixed — Cannot display timeline of deleted reviews (COLLAB-145)
- fixed — Perforce client-ownership check does not respect case-sensitivity setting (COLLAB-152)
- fixed — MS SQL Server 2012 - unable to import system dump files (COLLAB-168)
- fixed — Review deadline is showing dummy data on the Reports (COLLAB-170)
- fixed — RTC - Reopening a review does not change the Work Item approval status (COLLAB-175)
- fixed — RTC - Cannot upload change sets when the number of changes is hidden in the RTC client (COLLAB-187)
- fixed — Option to filter users when adding them to groups does not work properly (COLLAB-192)
- fixed — CodeReviewer webpage showing when clicking Help from Collaborator (COLLAB-194)

8.3.8301 - December 10, 2013

- added — Major performance boost for files with many convos (Case 66490)
- added — Delete work item assignments when a reviewer is removed from a review (Case 76684)
- added — RTC - automatic Work Item approvals (Case 71231)
- added — Respect max rows in printable and csv report versions (Case 76670).

- added — Invite emails mentioned in comment to Review (Case 76479)
- added — RTC - Add Collaborator reviewers as Work Item assignments (Case 73575)
- fixed — Checklist - If you enter two CL items with same name, you simply get kicked to a new screen with an error, lose work (Case 76056).
- fixed — 8.3 Triggers failing on locked clients on 2011.1 (Case 71642)
- fixed — Fixed server memory leak w/ large uploaded files. (Case 76672)
- fixed — 8.3 - Group Synch XML Functionality (Case 76644)
- fixed — Recognize emails with '+' (Case 76652)
- fixed — 8.3: Uploaded file chat message may link 'wrong' version of the file (Case 74198)
- fixed — Remove user agent XSS vulnerability (Case 76661)
- fixed — Search button gradient (Case 75989)
- fixed — Fix alignment of "Next Steps" and "Search" buttons (Case 76656)
- fixed — Explain existing Review load in 'Add to Review' wizard (Case 76651)
- fixed — Deadlines change automatically with timezones (Case 76640)
- fixed — 8.3 - Capturing connection errors deeper than one level(Case 76643)
- fixed — TEE clients were breaking when trying to get the properties or content of a deleted file (SF Case 8309)
- fixed — Support Directory in ClearCase(Case 69826, Review#9789)
- fixed — AddDiffs relative tag causing issues to arise in some cases when trying to add comments/defects in the diff viewer (SF case 8413)
- fixed — roles who are not allowed to modify the general information section of a review can now check/uncheck checklist items and modify participant custom fields (case 76610)
- fixed — deadline column not sortable on home page (case 76192)

8.2.8202 - October 29, 2013

- added — Support <http://www.opensearch.org> (Case 75699)
- added — Decouple "eval formulas" detail toggle and option (Case 75243)
- added — "Home" link on the dashboard refreshes action items (Case 75323)

- added — Support for Excel ".xslm" file format (Case 75461)
- added — Sign/decline reviews in Eclipse (Case 74648)
- added — Command-line scripting commands for signatures (Case 74648)
- added — Add "Signature Status" to review list reports (Case 74649)
- added — View for reporting on Electronic Signatures (Case 74649)
- added — Create Views in embedded database (Case 74150)
- added — Show signature status in 'collab admin review-xml' (Case 74649)
- added — Show signature status in Review Detail Report (Case 74649)
- added — "Signed/Pending signature/Declined by" filter to reports (Case 74649)
- fixed — Reduced memory usage, improving server performance. Should reduce OOM errors with large document reviews. (Case 75814)
- fixed — Eclipse plugin: fail to create new review. (Case 76312)
- fixed — Display more detail about web upload errors (Case 75990)
- fixed — Reduce db queries for Review Summary page (Case 76239)
- fixed — Search cannot find drop-down custom fields in Embedded database (Case 75833)
- fixed — Show "N/A" instead of "null" when deadlines disabled (Case 76000)
- fixed — Grey disabled list options in IE8 (Case 75998)
- fixed — Load "existing reviews" in GUI just-in-time (Case 75606)
- fixed — Link community section to active forum (Case 75668)
- fixed — Better error message converting old Excel files (Case 75317)
- fixed — Reordering Excel sheets shows bogus modifications (Case 75937)
- fixed — Checklist - Add more line items functionality (Case 75209).
- fixed — RTC - Reviews are created for work items with no changesets (Case 74785)
- fixed — Add possibility to add group admins in group sync and fix documentation for group sync command (Case 75608)
- fixed — RTC - Cannot upload new changes from Work Item when previous review is deleted (Case 72633)

- fixed — Command-line help displays args in wrong order (Case 75743)
- fixed — Synergy - Make Windows-only parameter -n optional (Case 75851)
- fixed — Text diff options do not work after changing "Wrap Lines" (Case 75614)
- fixed — RTC: Reviews are generated for the work item creator and not the owner (Case 73064)
- fixed — Preserve review pool status for groups in group-sync when the review pool flag is not given again (Case 75562)
- fixed — Materials with the same name from different components are munged together (Case 75454)
- fixed — Only showing one tab in Spreadsheet diff (Case 75369)
- fixed — Changelist names and descriptions are wrong (Case 75061).
- fixed — Electronic Signature enabled, signatory not included in review participants (Case 75512)
- fixed — Changelist names and descriptions are wrong (Case 75061).
- fixed — Link downloads wrong version in diff viewer (Case 75738)
- fixed — Make web UI buttons look less "flat" (Case 75319)
- fixed — Review Summary page scrolls when checklist clicked (Case 75148)
- fixed — Overview shows participant count of previous review (Case 74904)
- fixed — Zoom image diff correctly on window resize (Case 75371)
- fixed — Make web UI buttons less "flat" (Case 75319)
- fixed — Better error message on old Excel formats (Case 75317)
- fixed — Show participant signature status in Eclipse (Case 74648)
- fixed — checklists with spaces make review-xml malformed (Case 75491).
- fixed — Retain leading whitespace in comments (Case 74970).
- fixed — Checklist - Add more line items functionality (Case 75209).
- fixed — Triggers failing on locked clients on 2011.1 (Case 71642)
- fixed — Suppress "encode illegal character" warning (Case 74809)
- fixed — "View As" label sometimes misaligned (Case 75170)

- fixed — Re-layout custom field sections on show/hide (Case 74406)
- fixed — RTC - Error uploading deleted file when file already exists on review and has comments (Case 75251)
- fixed — Unused column in admin/users view (Case 74884).
- fixed — Unused column in admin/users view (Case 74884).
- fixed — Navigate to next/prev diff in spreadsheets (Case 74961)
- fixed — Materials sections columns collapse in "compressed" mode (Case 74469)
- fixed — Commit Comments not displayed for ClearCase(Case 75806)
- fixed — Commit Comments not displayed for ClearCase(Case 75806)
- fixed — Problem in 8.2 when adding a changelist and a folder was modified but not moved (case 75556)
- fixed — comment text wrapping problems(Case 75598).
- fixed — Error uploading changelist in subversion when NodeKind was invalid (case 75444)
- fixed — Support a version-extended base filename for Clearcase Addversions(Case 69562, fix unit test)
- fixed — Eclipse - Review Pools do not show up in list of addable participants in Eclipse(Case 70282, fix unit test)
- fixed — reviews sometimes showing up multiple times in action items after a template change (case 75216)
- fixed — 8.2.8200 had upgrade issues with Oracle backed servers (case 75426)
- fixed — Allow upload of multiple changelists in web UI (Case 71476)
- fixed — can now add TFS shelvesets with a leading or trailing space (case 73868)
- fixed — Users are now allowed to accept if they have opened a defect in a chat thread and users can no longer accept the same thread multiple times in a row (case 72236)
- fixed — creating custom fields no longer automatically adds them to a template (case 74089)
- fixed — Participant status no longer switches to 'Approved' upon review cancellation or rejection, the status stays as it was (case 73163)
- fixed — Support a version-extended base filename for Clearcase Addversions(Case 69562, Review #9462)

- fixed — you can no longer set the maximum value for the length of a custom field to be less than the minimum value (case 74440)
- fixed — invalid subscriptions are no longer allowed to be created, added diagnostic to remove invalid subscriptions already in place (case 68450)
- fixed — Support a version-extended base filename for Clearcase Addversions(Case 69562)
- fixed — Eclipse - Review Pools do not show up in list of addable participants in Eclipse(Case 70282)

8.2.8201 - August 28, 2013

- fixed — Corrected a field name that prevented Oracle databases from starting with 8.2.8200 (Case 75426)

8.2.8200 - August 27, 2013

- added — Excel Support
- added — Checklist Support
- added — Make custom fields mandatory by a phase in the review (Case 71847)
- added — RTC - Implement switch to add reviewers to review from work item assignments (Case 73574)
- added — Git support to "ensure-reviewed" and "ensure-review-started" triggers (Case 68627)
- added — RTC - Indicate which work item types under which states should trigger generating/ updating review (Case 73572)
- added — Installer includes Active Directory authentication option (Case 73443)
- added — RTC - Allow multiple Collaborator servers per RTC server (Case 73571)
- added — Verify Database Schema now run at server start (Case 69166)
- added — Diagnostics now add their results to the log file. (Case 69166)
- fixed — BOTH - Perforce: Error when submitting a deleted symlink (Case 74037).
- fixed — Clicking file convo location links with spaces do not focus&scroll convo in diff viewer (Case 71652).
- fixed — Collaborator: Community section should be disabled by default (Case 74924)
- fixed — "Next Steps" shows too many buttons in Planning with review pools (Case 70425)
- fixed — Custom Defect Field Description Placement (Case 70746)

- fixed — Problem opening reviews due to invalid role ID (Case 70705)
- fixed — master - Review Summary - View separate - Status shows 'Initial' on all changelists (Case 70703).
- fixed — master - Can add user to review even when user does not have access (Case 73065)
- fixed — 'local' modifier is broken for perforce addversions (Case 73758)
- fixed — Defect Custom Fields Ignore Default Value Params (Case 74591).
- fixed — Master - workflow should stay in Rework until Author kicks it out (Case 65518)
- fixed — Master - Group and Template inputs can only display 25 elements (Case 73546).
- fixed — Supportability: Set default lazy-upgrade value to '1' instead of blank (Case 74602).
- fixed — Changelists rolled up under 'View as: Separate' (Case 74174)
- fixed — no padding around community section. (Case 74288)
- fixed — do not block web UI while triggers running (Case 69159)
- fixed — Triggers run after database transaction complete (Case 74260)
- fixed — Possible deadlock promoting convos on documents (Case 73356)
- fixed — Add pref to disable decorating workspace files (Case 72153)
- fixed — Error opening diff viewer in Eclipse 4.3 Kepler (Case 74171)
- fixed — Cannot open diff viewer in Eclipse 4.x (Case 70492)
- fixed — Validate Automatic Link regex works in Javascript (Case 73901)
- fixed — Handle Automatic Link errors (Case 73901)
- fixed — Incorrect Quoting in ExternalDiffLauncher (Case 72222)
- fixed — Action items do not have urls if "external URL" not specified (Case 70688)
- fixed — Error uploading files with HTTPS and Proxy (Case 73807)
- fixed — Hide "take review pool" icon for non-pool participants (Case 72882)
- fixed — Cannot reject review with certain "reasons" (Case 73549)
- fixed — Both - Upload P4 shelved files from Web UI uploads empty diffs when there are pending files in the changelist. (Case 70421)
- fixed — P4 Passwords are output in plaintext by DebugCommandRunner (Case 73062)

- fixed — Web debug log stack traces not deobfuscated correctly (Case 73595)
- fixed — directory contents after a directory move not being shown when adding subversion revisions, initial commit. (Case 73161)
- fixed — Review Summary - View separate - Status shows "Initial" on all changelists (Case 70703)
- fixed — Page keeps reloading if fails "single server" check (Case 73467)
- fixed — Subversion triggers respect "Restrict Access" rules (Case 72912)
- fixed — Perforce triggers respect "Restrict Access" rules (Case 72912)
- fixed — Report on Review access restrictions (Case 73202)
- fixed — do not log scary warning about client log file (Case 67725)
- fixed — Uploading .pdf, .doc, and .docx files leaks memory. (Case 72595)
- fixed — Stuck at dancing bear if try to go "back" (Case 72007)
- fixed — Improved rendering speed for large text diffs (Case 72135)
- fixed — Disable "Email Everyone" when no one to email (Case 72710)
- fixed — Action items error when Review Pool user cannot access Review (Case 73200)
- fixed — Check Permissions for Report & Version access (Case 73040)
- fixed — Community section has misleading text when cannot show online version (Case 72940)
- fixed — Error leaving Review in Phase with invisible PCF (Case 74333)
- fixed — Defect log entries should open latest version of file (Case 73748)
- fixed — Defaults for custom fields are now stored properly so changes in a default do not change the history of reviews. (case 73999)
- fixed — Addchanges from the GUI client now works with SVN 1.8 (case 73980)
- fixed — CCRC 8.0 plugin support (Case 72806)
- fixed — review-xml now does not show metrics section if user does not have access to reports (case 70738)
- fixed — review, version, and changelist data accessible even when there is no user by navigating to data/urls. Initial commit (case 70738)
- fixed — Edit participant custom fields on Review Summary page (Case 72275)

- fixed — review-xml now does not show metrics section if user does not have access to reports (case 70738)
- fixed — review, version, and changelist data accessible even when there is no user by navigating to data/urls. Initial commit (case 70738)
- fixed — Review summary error with review pools and restrict access (Case 73201)

8.1.8100 - May 29, 2013

- Initial release of CodeReviewer and CodeReviewer Pro
- added — daily automatic backups for HSQLDB (Case 70617)
- added — FREE, PRO, Collaborator: Community page (Case 71082)
- fixed — "Recent Participants" links not displayed in Eclipse (Case 72881)
- fixed — Recent participants section not showing recent participants when 'All Users' Group is selected (Case 72022)
- fixed — Confusing version information for added files (Case 70637)
- fixed — Before and After not displaying correctly (Case 72263)
- fixed — Typing in comment box slow on IE8 (Case 72402)
- fixed — No markers displayed on PDF file when lots of defects are added (Case 72551)
- fixed — Prevent Cross-site-scripting attacks by correctly escaping parameters before re-displaying on some pages (Case 72282)
- fixed — Prevent cross-frame-scripting attacks by adding header X-FRAME-OPTIONS: SAMEORIGIN to HTTP Responses (Case 72283)
- fixed — Typing in comment box slow on IE8 (Case 72402)
- fixed — Document Review - Pushpins in wrong location (Case 70455)
- fixed — FREE: Free version links to support phone and email(Case 72904)
- fixed — FREE: Admin page "Additional Features" list is difficult to read(Case 72794)
- fixed — CodeReviewer - GUIClient shows all SCM instead of git and SVN only.(Case 72734)
- fixed — CodeReviewer: The "My Activity" button needs to be disabled.(Case 72736)
- fixed — CodeReviewer - Version Control: available features that should not be.(Case 72702)

- fixed — DiffViewer throws exception when Empty Document file(.docx) in version 0 (Case 72191)
- fixed — review not changing state to approved after reviewers were moved to observers (case 72023)
- fixed — Error Viewing PDF Documents After Upgrade(blank page pdf) (Case 70154)
- fixed — corrupted VSS diffs hang client (case 71910)
- fixed — TFS gated build changesets generate 'Missing changeset date' error (case 71790)
- fixed — NoClassDefFoundError creating TFS shelvesets (cases 71641, 71771)
- fixed — do not npe if changelist is missing (cases 71068, 71767)
- fixed — multiple issues when communicating with newer Subclipse clients using SVN 1.7 (case 70330)

8.0.8003 - April 15, 2013

- added — Detect OpenJDK (Case 71563)
- fixed — Review: Materials and Participant Section break after user takes review pool. (Case 71711)
- fixed — NPE when adding a review pool and mandatory subscriptions are enabled (case 71395)
- fixed — GUI client runs out of window handles (case 70850, case 71368)
- fixed — Increase default PermGen space to alleviate OutOfMemory errors (Case 70849)
- fixed — warn when participants cannot access review (Case 70794)
- fixed — Hidden mandatory custom field error trying to Begin Review (Case 71719)
- fixed — Renaming Root.xml does not work in 8.0 (Case 71591)
- fixed — Error uploading .docx to review (Case 66861, Case 70376)
- fixed — Could not Begin Review when there is invisible custom field selected (Case 71451)
- fixed — phase view does not include new 7.0 phases (case 70869)
- fixed — Issue with "Done Editing" (Case 71033)
- fixed — CCRC 8.0 and CCRC getVersions support(Case 66839)

- fixed — client installer effectively freezes when installing p4 tools under certain conditions (Case 70975)
- fixed — disable review pools in "participants" drop-down if not allowed to add (Case 70424)
- fixed — Review Materials Section: Columns are not lining up (Case 70046)
- fixed — HCF with no valid values causes error (Case 71184)
- fixed — Errors when adding a changeset that contains an "evil twin" scenario (Case 71298)
- fixed — Could begin Review even when the required custom Fields has no value yet (Case 70976)
- fixed — Drop-down series custom field name overflows column (Case 71032)
- fixed — better error message for Moved Temporarily / Moved Permanently errors while accessing /contentupload (Case 70157)
- fixed — do not prompt user to enable debug mode (Case 69595)
- fixed — custom fields replicate when navigating from home screen and reviews (Case 70968)
- fixed — Update changelist trigger needs to run as change-submit (Case 70793)
- fixed — Problem adding this Word document to a review (Case 69591)
- fixed — Line numbers overlapping in diff viewer (Case 70302)
- fixed — Action Item missing link if External URL not configured (Case 70688)
- fixed — Fully reset search box when going to next file (Case 70831)
- fixed — Use "Enter" to navigate to next search result (Case 70319)
- fixed — do not scroll to center when clicking convo (Case 69780)
- fixed — Truncate phone number with ellipsis if too long (Case 70393)
- fixed — Better tolerance for missing or corrupted documents (Case 69706)
- fixed — Error using Group-based access restrictions when Review not associated with Group (Case 70530)
- fixed — Cannot submit error report from login or "upgrade db" views (Case 70573)
- fixed — Update browser window title when review title changes (Case 70207)
- fixed — Make Drop-down series custom fields horizontal (Case 70218)
- fixed — Problem adding this Word document to a review (Case 69591)

- fixed — Line numbers overlapping in diff viewer (Case 70302)
- fixed — Review Subs - Able to remove Mandatory do not Enforce subs from reviews (Case 70404)
- fixed — Stack overflow caused by circular dependency on version history (Case 70562)

8.0.8001 - March 5, 2013

- NEW — Merged CodeCollaborator and PeerReview Complete as Collaborator!
- added — The Review Summary screen has now replaced the old create and edit review screens (Case 62189)
- added — You can now search .doc and .docx files in the diff viewer
- added — Review pools: groups of users that can be assigned to 'take' a participatory position in a review
- added — Add revert control to fields on Review General Information in edit mode (Case 69589)
- added — Edit Review: Add updating spinner next to each field and update revert control image (Case 69796)
- fixed — Removed RPM installer support (Case 69471)
- fixed — Edit participant issues with disabled templates (Case 70280)
- fixed — Edit review - template selection - will not save change if template names are same (Case 70284)
- fixed — Defect HCF custom field area has strange red bar (Case 70105)
- fixed — Group select too short (Case 70187)
- fixed — "Done Editing" participants button does not work after going to file (Case 70061)
- fixed — Line up the Files and Defect boxes under the left edge of the Cancel button (Case 70172)
- fixed — Error sorting table by clicking header (Case 69987)
- fixed — Auto-save causes cursor to jump on text fields (Case 70063)
- fixed — The Edit buttons for general info and participants section do not line up (Case 69894)
- fixed — Better tolerance for missing or corrupted documents (Case 69706)
- fixed — Review Summary - No warning when changing review templates (Case 69805)

- fixed — Eclipse & RTC - Find and replace CodeCollaborator & PeerReview Complete logos and icons (Case 69813)
- fixed — Error refreshing diff viewer after changing versions (Case 69892)
- fixed — Bogus "pending updates" warning after editing title (Case 69662)
- fixed — "Download Diff" button returns backwards diff (Case 69869)
- fixed — Log warnings about missing document fonts (Case 69799)
- fixed — Page up/down should scroll the diff viewer (Case 66640)
- fixed — Error when clicking through diff viewer before file fully loaded (Case 69637)
- fixed — Edit button in participant section needs to respect whyNotAllowedToModifyReview (Case 69534)
- fixed — Edit review general info: validation issue with groups when the group select is not visible (Case 69765)
- fixed — Parts of the general info edit drop-downs not clickable (Case 69664)
- fixed — Calculate Download/Upload menu positions dynamically (Case 69593)
- fixed — Autocomplete URL with default protocol when Attaching URL's (Case 69663)
- fixed — "Directory Found not in Git Repo" when "git" not in PATH (Case 69434)
- fixed — Remove bogus 'lastCommentCreationDate' log warning (Case 69412)
- fixed — 'Missing changeset Items' error parsing TFS changeset (Case 67093)
- fixed — Review Summary - Hierarchical custom fields are not hierarchical anymore(Case 69986)
- fixed — Begin Review should be disabled when General Info wait for input of the required fields(Case 69927, Review# 8846)
- fixed — Review title cannot be null or over 255 characters long(Case 69850, Review #8819)
- fixed — Document CollabFormAuthenticator's new functionality (Case 69887)
- fixed — Review should not move to next phase if still in edit mode for either the general info section or the participants section(Case 69913)
- fixed — Better error when uploading a URL/changelist to a completed review(Case 69851)
- fixed — Template list contains disabled ReviewTemplates(Case 69787, Review #)
- fixed — Author subscription user dropdown not working(Case 69783)

- fixed — "There is no current object" and other document problems (Case 69591)
- fixed — Admin Review Templates - cannot create a new template(Case 69792)
- fixed — Admin - More intuitive UI for Review Template edits(Case 69011, Review #8687)
- fixed — Client - always use configured URL to contact the server(Case 68993, Review#8698)
- fixed — Fixed — Client - always use configured URL to contact the server(Case 68993)
- fixed — Increased supportability for various SCMs by removing the word 'optional' when users are inputting the source path in the GUI client (case 61880)
- fixed — NPE in p4 implementation when a filepath is expected to be a symlink and it is not (case 64001)
- fixed — Missing or wrong changelist "external diff" button (Case 68873)
- fixed — Admin - More intuitive UI for Review Template edits(Case 69011)
- fixed — When in "Side by Side", "After" and "Before" drop-down text do not change properly (Case 68917)
- fixed — Adding shelvesets from Team Explorer now has expected behavior (case 67093)

11.2.6 Version 7

7.3.7304 - July 2, 2013

- fixed --- Incorrect Quoting in ExternalDiffLauncher (Case 72222)
- fixed --- Action items do not have urls if "external URL" not specified (Case 70688)
- fixed --- Error uploading files with HTTPS and Proxy (Case 73807)
- fixed --- Both - Upload P4 shelved files from Web UI uploads empty diffs when there are pending files in the changelist. (Case 70421)
- fixed --- P4 Passwords are output in plaintext by DebugCommandRunner (Case 73062)
- fixed --- Web debug log stack traces not deobfuscated correctly (Case 73595)
- fixed --- Page keeps reloading if fails "single server" check (Case 73467)
- fixed --- Subversion triggers respect "Restrict Access" rules (Case 72912)
- fixed --- Perforce triggers respect "Restrict Access" rules (Case 72912)
- fixed --- Report on Review access restrictions (Case 73202)

- fixed --- do not log scary warning about client log file (Case 67725)
- fixed --- Uploading .pdf, .doc, and .docx files leaks memory. (Case 72595)
- fixed --- Stuck at dancing bear if try to go "back" (Case 72007)
- fixed --- Check Permissions for Report & Version access (Case 73040)
- fixed --- Typing in comment box slow on IE8 (Case 72402)
- fixed --- Errors when adding a changeset that contains an "evil twin" scenario (Case 71298)
- fixed --- better error message for Moved Temporarily / Moved Permanently errors while accessing /contentupload (Case 70157)
- fixed --- do not prompt user to enable debug mode (Case 69595)
- fixed --- Update changelist trigger needs to run as change-submit (Case 70793)
- fixed --- Problem adding this Word document to a review (Case 69591)
- fixed --- Line numbers overlapping in diff viewer (Case 70302)
- fixed --- do not scroll to center when clicking convo (Case 69780)
- fixed --- Error using Group-based access restrictions when Review not associated with Group (Case 70530)
- fixed --- Cannot submit error report from login or "upgrade db" views (Case 70573)
- fixed --- Error sorting table by clicking header (Case 69987)
- fixed --- Better tolerance for missing or corrupted documents (Case 69706)
- fixed --- Error refreshing diff viewer after changing versions (Case 69892)
- fixed --- "Download Diff" button returns backwards diff (Case 69869)
- fixed --- Log warnings about missing document fonts (Case 69799)
- fixed --- "Directory Found not in Git Repo" when "git" not in PATH (Case 69434)
- fixed --- Remove bogus 'lastCommentCreationDate' log warning (Case 69412)
- fixed --- 'Missing changeset Items' error parsing TFS changeset (Case 67093)
- fixed --- 'Missing changeset Items' error parsing TFS changeset (Case 67093)
- fixed --- review-xml now does not show metrics section if user does not have access to reports (Case 70738)

- fixed --- review, version, and changelist data accessible even when there is no user by navigating to data/urls. Initial commit (Case 70738)
- fixed --- corrupted VSS diffs hang client (Case 71910)
- fixed --- TFS gated build changesets generate 'Missing changeset date' error (Case 71790)
- fixed --- NoClassDefFoundError creating TFS shelvesets (Cases 71641, 71771)
- fixed --- do not npe if changelist is missing (Cases 71068, 71767)
- fixed --- phase view does not include new 7.0 phases (Case 70869)
- fixed --- multiple issues when communicating with newer Subclipse clients using SVN 1.7 (Case 70330)
- fixed --- "There is no current object" and other document problems (Case 69591)
- fixed --- Increased supportability for various SCMs by removing the word 'optional' when users are inputting the source path in the GUI client (Case 61880)
- fixed --- Missing or wrong changelist "external diff" button (Case 68873)
- fixed --- When in "Side by Side", "After" and "Before" drop-down text do not change properly (Case 68917)
- fixed --- adding shelvesets from Team Explorer now has expected behavior (Case 67093)

7.3.7303 - January 18, 2013

- added --- Syntax highlighting for .hss, .ss and .ts files
- added --- Syntax highlighting for ECMA script (.es) files
- fixed --- Files showing wrong upload order (Case 66561)
- fixed --- Generic error popup when not allowed to access review (Case 67902)
- fixed --- missing spaces on review summary page (Case 67496)
- fixed --- RTC: Uploading a merged changeset results in incorrect version diff (Case 67862)
- fixed --- Flat vs compressed tree (Case 62144)
- fixed --- Next/Prev file button troubles in new version (Case 68084)
- fixed --- Compact view causes word wrap in chat panel to not work (Case 68589)
- fixed --- Error editing partially reworked changelist in separate view (Case 68506)

- fixed --- better error handling for ReviewAccessException (Case 68200)
- fixed --- Stuck at dancing bear after leaving diff viewer (Case 67949)
- fixed --- Chat icons not showing in materials section (Case 68184)
- fixed --- Materials section does not refresh correctly after review event (Case 68382)
- fixed --- Diff Viewer - Prev/Next buttons do not see next diffs when a comment is made on the first diff(Case 67680)
- fixed --- Conversation toolbar disappears when you select different line during defect creation (Case 67931)
- fixed --- Change user agent matcher in Browser.java to match new Gecko version string (Case 67979)
- fixed --- Errors after leaving diff viewer before diff is loaded (Case 67949)
- fixed --- Use ticket instead of user/pass if user/pass is passed in (Case 67749)
- fixed --- Cannot get electronic signatures to consistently work (Case 66367)
- fixed --- Enabling electronic signatures adds completed reviews to action items (Case 68587)
- fixed --- Not using External URL in some places (Case 68153)
- fixed --- Diff Viewer - Next/Prev Line keyboard shortcuts do not work (Case 68218)
- fixed --- Diff viewer Add Comment and Add As Defect buttons should be disabled if create not allowed (case 68373)
- fixed --- Add "external name" to custom defect list reports (Case 56067)
- fixed --- Error showing new version in diff viewer (Case 68219)
- fixed --- Diff Viewer - Prev/Next buttons do not see next diffs when a comment is made on the first diff (Case 67680)
- fixed --- AddVersion(Clearcase) from command line does not work in 7.3 (Case 67726)
- fixed --- Loading port monitor dll from install directory (case 67338)

7.3.7302 - November 21, 2012

- fixed --- Add time zone info to dates in UTC reports (Case 67610)
- fixed --- Unread comments improved for accessibility features (Case 67648)
- fixed --- Clicking 'Create Bug in Bug Tracker' should open in a new tab (Case 65863)

- fixed --- Able to modify roles without error (Case 67348)
- fixed --- Allow some copy/paste functionality in text diff viewer (Case 65946)
- fixed --- Blended reviews (Case 67514)
- fixed --- Handling for symlinks in perforce (Case 67550)
- fixed --- UI limit expanded beyond 10,000 users (Case 66400)
- fixed --- diff viewer now shows side-by-side diffs of identically versioned text files (Case 65933)
- fixed --- Print To Review no longer clips left margin (Case 66562)
- fixed --- Debug logging no longer creates infinitely huge log files in temp (Case 65617)
- fixed --- Scrolling on Firefox improved (Case 67051)
- fixed --- Synchronized locking code to avoid overlapping file lock (Case 66667)
- fixed --- "Show More Lines" button behavior corrected when used with wrap lines (Case 67052)
- fixed --- Password showing in GUI client in plaintext (Case 66089)
- fixed --- Oracle upgrade issues resolved (Case 67040)
- fixed --- User_lastactivity updates while user idles on the home screen (Case 66986)
- fixed --- Corrected NPE with action items if the user had no items(Case 65565)
- fixed --- Changed log level from 'warn' to 'error' for some DB migration issues (Case 64473)
- fixed --- Updated 'addardiffs' command documentation to cover AccuRev limitations (Case 66130)
- fixed --- Catch error from P4 when files are not opened for edit (Case 66901)
- fixed --- Corrected AccuRev error when file system root is inaccessible (Case 66503)
- fixed --- Resize comment box as you type (Case 65616)

7.3.7301 - October 26, 2012

- Added --- Compact view options for Review Summary and Diff Viewer pages.
- Added --- Improved content information on collapsed sections of Review Summary page
- Added --- Authenticated SMTP support

- Added --- Easy, in-application upgrade path from CodeCollaborator to PeerReview Complete
- Added --- Support for Visual Studio 2012 and Windows 8
- fixed --- Oracle upgrade issue from 7222 to 723 (Case 67040)
- fixed --- Reduced load on database from diff viewer (Case 65373)
- fixed --- Reject review reason is no longer a custom field (Case 61600)
- fixed --- Surround 'Unexpected empty version for path' error handling (Case 66261)
- fixed --- Several IE bugs in diff viewer (Case 65579)
- fixed --- git addchanges now works with unchanged, managed files (Case 66417)
- fixed --- Accurev error handling when file system root is inaccessible (Case 66503)
- fixed --- Changing version in Eclipse compare editor no longer breaks connection (Case 65305)
- fixed --- Deleted files no longer show reverted icons in Review Materials section (Case 65580)
- fixed --- Reduced DB contention when updating user activity (Case 66273)
- fixed --- Support .DOC and .DOCX uppercase extension names (Case 66112)
- fixed --- Clearcase Server Integration (Case 64295)
- fixed --- Integration to CCRC with a Bad Password no longer causes lockout (Case 65551)
- fixed --- Pipe symbols in custom fields now work correctly (Case 66161)
- fixed --- Review Summary screen now displays while still loading materials
- fixed --- Auto-adding of unversioned directories now supported on newer subclipse clients
- fixed --- Eliminated a 'jump' in chat when working with defects (Case 65350)
- fixed --- Non-participant comments no longer highlighted until read (Case 65102)
- fixed --- Improved TFS date parsing by adding he_IL locale
- fixed --- Diff viewer refreshing when no longer visible (Case 66082)
- fixed --- Support for Synergy web mode (Case 63794)
- fixed --- TFS date parsing no longer fails for English India locale (Case 65220)
- fixed --- Handle null state passed by P4Version (Case 64548)

- fixed --- Resolve null pointer exception (Case 64653)
- fixed --- P4V and add pending changelist commands now grab shelved changes (Case 64460)
- fixed --- ClassCastException calling protects command (Case 63322)
- fixed --- P4 Error "Unicode clients require unicode enabled server is now resolved automatically (Case 64450)
- fixed --- Upgrade doc conversion utility (Case 64799)
- fixed --- AccuRev diff error "9002" or "9005" (Cases 65481, 65568, 65482)
- fixed --- Error uploading files with proxy to server not at root (Case 65078)
- fixed --- Clients now able to work on systems that do not support file locking (Case 65567)
- fixed --- Correct problems running multiple commands at one time (Case 56660)
- fixed --- Add template as one of the fields that can be added to a custom report (Case 64403)
- fixed --- Concurrent modification exception from Eclipse client (Case 65498)
- fixed --- Hide SVN "Require Client Cert Password" option on server (Case 65483)

7.2.7237 - August 16, 2012

- Added --- PDF document diff support! (PeerReview Complete, only)
- Added --- Multiple file upload support for IE from review summary page.
- Added --- Support additional file extensions for Gosu and xml file types (case 64942)
- Added --- "Synchronize Scrolling" option in non-wrapped side-by-side diff
- Added --- Added functionality to upload multiple files that works in IE (using Flash)
- Added --- Added another "mark all read" button at top of diff convos (Case 64110)
- Updated --- [Known issues](#)⁸⁷² for this release have been updated clearing out some of the beta notes and adding new information.
- fixed --- PrintToReview will now print documents for doc-diff that are more than 1 page (Case 65443, Case 65361)
- fixed --- ClassCastException calling protects command (case 63322)
- fixed --- Resolved null pointer exception on ensure-diffs-reviewed (Case 64653)

- fixed --- subclipse addfiles throwing nullpointer in some instances if auto add is enabled
- fixed --- make IE use standards mode, even on intranet sites (Case 65013)
- fixed --- Problems with running multiple commands at one time.(Case 56660)
- fixed --- better handling of web UI upload errors (Case 65036)
- fixed --- cursor position reset labeling new convo in IE (Case 65068)
- fixed --- error after switching to new version of file via popup (Case 64853)
- fixed --- pressing <enter> in login fields no longer tries to log in twice
- fixed --- Grabbing values set by P4CONFIG into the client connection except the ones we override (Case 64262)
- fixed --- Disable login button while waiting for login response
- fixed --- New users will not get created twice (Case 64356)
- fixed --- review details page now hidden if the user does not have access to reports (case 64940)
- fixed --- do not show system message in diff viewer (part 2 of Case 65013)
- fixed --- do not linkify javascript: and other unsafe URL's
- fixed --- trust admin-configured Automatic Links (Case 65011)
- fixed --- fixed issue trying to add a file with haveRev #none to a review (Case 64653)
- fixed --- StarTeam format diffs not auto-detected by 'ccollab adddiffs' (case 63719)
- fixed --- p4 submitoptions other than submitunchanged could not handle edit-less changelists (case 64897)
- fixed --- P4 Error "Unicode clients require unicode enabled server" is now resolved automatically (Case 64450)
- fixed --- Allow adding yourself to a review
- fixed --- Show better UI for license errors
- fixed --- add ability to enter license code when upgrading(Case 63831)
- fixed --- Preserve p4 jobs data in update-changelist trigger (Case 64252)
- fixed --- Making a comment with no label will no longer break the review screen (Case 64738)
- fixed --- Addhgdiffs no longer throws a null pointer if not inside hg repo

- fixed --- Error with defect custom field of type Drop-down Series (Case 64773)
- fixed --- Change "Character Encoding" option form radio group to select box
- fixed --- Chat History and Review Materials sections not displayed (case 64534)
- fixed --- Line number linkifying does not function(Case 57351)
- fixed --- StarTeam current diff revision should be specified by -cfdg (case 64255)
- fixed --- support cvs 1.12.9 date format (case 64129)
- fixed --- Added files in Surround committed changelists are blank (case 64149)
- fixed --- Setting system clock back no longer prevents login or logout (Case 64526)
- fixed --- old urls not pointing at new resource locations (Case 63149)
- fixed --- Installing RTC Eclipse plugin: Make HCF compatible with 6.5 plugin clients (Case 64232)
- fixed --- Home screen filter bug (Case 63804)
- fixed --- annotation dialog and defect text detail appear over login screen
- fixed --- modal error dialog does not "grey out" rest of screen
- fixed --- show "new version available" popup in diff viewer (Case 64268)
- fixed --- always list all available versions in diff viewer drop-down
- fixed --- git diff neglected deletes (Case 61431)
- fixed --- automatically refresh to work around race condition for fresh servers(Case 63598)
- fixed --- error clicking in diff viewer after adding more context (Case 65479)
- fixed --- subversion filenames with embedded at symbols (case 63425)
- fixed --- Cannot load obfuscated dumps (Case 63339)
- fixed --- Diff setting "latest accepted revision" seems to be broken (Case 62421)
- fixed --- Fix web mode parameter -s for Synergy (Case 63794)
- fixed --- allow global options to "ccollabtray" (for example, "ccollabtray --debug)
- fixed --- save zip of all log files when running ccollabgui in debug mode (Case 61874)
- fixed --- Line number linkifying does not function (Case 57351)

- fixed --- tweak appearance of diff viewer header (Case 64543)
- fixed --- requested file subscriptions now working
- fixed --- Action Items: Outgoing filter is not filtering outgoing(Case 64213 and Case 63804)
- fixed --- Support path which is both file and folder in web UI (Case 64265)
- fixed --- On the Review Summary page: selecting any "You are waiting and will be notified when" radio button: no longer causes IE7 screen to shake (Case 64243)
- fixed --- Selecting 'no file content' on a review dump no longer results in a zip that contains files (Case 64487)
- fixed --- The custom defect fields of a new defect no longer populate with the values of the previously created defect.(Case 63320)
- fixed --- lines wrap in text diff with "wrap lines" disabled (Case 64229)
- fixed --- text highlighting in single file no longer jumps around and highlights multiple line numbers (Case 63808)
- fixed --- do not skip changed lines when comparing a file version with itself (Case 64076)
- fixed --- popup a warning and fallback if local storage quota exceeded (Case 64270)
- fixed --- Support "email all" with Outlook 2003 and 2007 (Case 63212)
- fixed --- Diff Viewer: Pushpins show over version drop down (Case 64317)
- fixed --- Send debug log message appears behind drag and drop screen. User cannot send debug log (Case 63883)
- fixed --- use admin-configured support email address (Case 61909)
- fixed --- Cannot rename custom fields. (Case 64109)
- fixed --- New pushpins not visible in the other version if on same page but off screen (Case 64312)
- fixed --- do not offer to reset password if using LDAP authentication (Case 64167)
- fixed --- making selected marker visible when hiding the rest (Case 64250)
- fixed --- Added files in Surround committed changelists are blank (case 64149)
- fixed --- Displaying Review Materials for large reviews is now faster. (Case 64090)
- fixed --- Participants section does not use up available width on FireFox (Case 64089)
- fixed --- navigate document diffs with prev/next button

7.2.7218 - June 25, 2012

- PeerReview Complete 2012 - Official release!
- Added --- [Diff Viewer](#)^[339] completely overhauled with new and improved display and navigation options.
- Added --- [Electronic signatures](#)^[333] (PRC only)
- Added --- [.doc and .docx diff support](#)^[355] with comment promotion (PRC only)
- Added --- More detailed performance logging in debug mode for web UI
- Added --- Image over-under Diff view (Case 62865)
- Added -- Page Width and Full Page zoom options. Zoom options now a ListBox (Case 61239)
- fixed --- Diff Viewer no longer produces exceptions with images in IE8 (Case 64346)
- fixed --- Doc diffs display correctly in IE (Case 64210)
- fixed --- Consecutive Git commits should not be seen as a rebase
- fixed --- Eliminated error when clicking 'External Diff' (Case 64120)
- fixed --- CcollabGui client hangs forever on mac when closing when changes added to review from P4V (Case 63049)
- fixed --- latest rebase should not trump latest accepted for LATEST_ACCEPTED preference (case 62421)
- fixed --- preserve scroll when going back to review summary from diff
- fixed --- Syntax highlighting failure means php file will not display in Code Collaborator (Case 63930)
- fixed --- Overlapping icons in defect log section (Case 63686)
- fixed --- Check type of dragged item in order to determine overlay display (Case 63882)
- fixed --- Subclipse NPE on file with Subversion missing status (case 63812)
- fixed --- mercurial auto detect always returns true if .hg exists on the path ignoring errors
- fixed --- Fix for move/delete and move/added (Case 62688)
- fixed --- Chat panel will not place focus on selected comment if it is located toward the top or bottom of the panel (Case 63891)

- fixed --- Modified check for fileapi support asking for specific functions supported (Case 63753)
- fixed --- Corrected version Descriptions to avoid 'latest upload' error (Case 63923)
- fixed --- Subclipse NPE on file with Subversion missing status (case 63812)
- fixed --- respect "display order" pref in diff viewer, refactoring (Case 63611)
- fixed --- Document diffs carry over to PDF and Image diff viewers
- fixed --- Error selecting modified lines in side-by-side (Case 63809)
- fixed --- no error popup for unexpected server errors
- fixed --- duplicate text diff context if user clicks too quickly
- fixed --- Fixed issues with the tooltip creation and with tooltips disappearing when going to next/prev files (Case 63625)
- fixed --- Subversive integration does not upload deleted files
- fixed --- Changing labels for Over/Under transparency control (Case 63585)
- fixed --- always expand selected convo (Case 63591)
- fixed --- Fix for glitchy behavior in the drag and drop div when you hover content over the 'Drop files here' legend. (Case 63576)
- fixed --- Reviews can be created from Eclipse when using a proxy on the Eclipse network connection settings (Case 62217)
- fixed --- add "--p4client" to "ccollab ensure-content-reviewed" doc (Case 63413)
- fixed --- improved cache performance when loading Review Overview
- fixed --- improved performance of DiffCache, used when loading reviews
- fixed --- do not wrap defect edit buttons

7.2.7208 - May 29, 2012

- PeerReview Complete 2012 Beta
- Added --- New diff viewer
- Added --- Initial support for doc/docx diffs

7.1.7111 - May 11, 2012

- fixed --- list reports are now displayed when selected (Case 63480)

7.1.7110 - May 7, 2012

- Added --- new user pref for saving overlay/separate display (Case 62262)
- Added --- drag/drop support for reviews
- Updated --- Performance improvements for new UI
- Updated --- Changed review summary screen to support collapsible sections (Not in IE7)
- Updated --- Diff viewer chat panel is now condensed and easier to use
- fixed --- Updated font in diff viewer chat panel (Case 63281)
- fixed --- Still display "Flat" as a view option from the prefs->Display tab (Case 63270)
- fixed --- Typo in web UI "form" -> "from" (Case 63256)
- fixed --- Drag and Drop div is visible in IE7 (Case 63263)
- fixed --- Disabled collapsible sections in IE7 (Case 63032)
- fixed --- Hierarchical custom fields now work for defects(Case 62193)
- fixed --- Pushpin placement has been corrected (Case 61491)
- fixed --- The highlight for the selected chat (Chat blue borders) is now displayed properly (Case 63195, Case 63207)
- fixed --- Change chat comment text to 10pt font(Case 63199)
- fixed --- Users should be able to add themselves to reviews if they are a member of the associated group (Case 63013)
- fixed --- subclipse 1.8 throwing null pointer exception when attempting add to review (case 62794)
- fixed --- Show comment input fields only for the active conversation.(Case 63094)
- fixed --- Refresh review summary page when diff viewer changes
- fixed --- "Submit error" UI should display the created case number (Case 63031)
- fixed --- Participant setting Group By None should be saved(Case 62533)
- fixed --- Links are no longer removed from the chat log when the overlay vs separate widget is clicked (Case 62792)
- fixed --- Fixed participant headers alignment for all supported browsers and reduced vertical space used by the file table (Case 63020)

- fixed --- Make login page work with browser "Remember Password" functionality (Case 61024)
- fixed --- Update CCRC .jar filename in manual (case 63047)
- fixed --- Conversation selection in diff viewer steals clicks (Case 62243)
- fixed --- Error pops up when opening review (Case 62982)
- fixed --- http proxies do not like /contentupload (case 61786)
- fixed --- As a user the separate vs overlay slider is confusing when there is only one changelist.(Case 62583)
- fixed --- Add header tags to important sections of the page (Case 62691)
- fixed --- Replace sprites with image elements for meaningful images (Case 62575)
- fixed --- performance improvements for diffcache misses. (Case 62893)
- fixed --- Support MKS variant branches in sandbox (case 62577)
- fixed --- RTC server side plugin missing dependency in feature.xml (case 62670)
- fixed --- Rework status now displays correctly in both overlay and separate views (Case 61955)
- fixed --- preserve scroll position of active element when page updates
- fixed --- Improve performance of GWT pages (Case 62142)
- fixed --- Root context not respected from links on report page (Case 61943)
- fixed --- addchangelist now parses git log messages with timezones greater than UTC (Case 62442)
- fixed --- IE7 issued warning on every page load over HTTPS (Case 62228)
- fixed --- CollabExternalDiff viewer breaking if the version/changelist ID contained invalid filename characters (case 62184)
- fixed --- filtering outgoing by author (case 62148)
- fixed --- 7.x clients once again respect SSL/proxy settings. (Case 62248)
- fixed --- Improve response time of the SimpleTable widget with deferred rendering (Case 62142)
- fixed --- better tooltip for 'Add and Include Defect' button, and use fix Label/Text inconsistency in defect log (cases 62285, 62532)

- fixed --- browse command now correctly only opens browser when specifically called
- fixed --- Class Cast exception while checking if the default changelist was empty (Case 62079)
- fixed --- Ignoring trailing strings after perform year.release-number string in order to retrieve support for shelveset correctly (Case 61812)
- fixed --- Added specific client to fstat and resolved commands when executing from a different client (case 61752)
- fixed --- Web UI inaccessible over SSL VPN such as Juniper IVE based SA (Case 62508)
- fixed --- Added dismiss button when review is completed and marked for commit. (Case 62261)
- fixed --- Root context not respected from links on report page (Case 61943)
- fixed --- external diff viewer not working on OSX (case 56192)
- fixed --- Grabbing p4 charset options correctly in command runner (Case 62349)
- fixed --- Highlight whole row of unread conversation in materials section
- fixed --- author should be able to begin review from Annotating phase (case 62401)
- fixed --- Download Latest Client Installer Link in dashboard view (Case 62007)
- fixed --- Added text to clarify which waiting option is selected. Fixed bug that showed wrong selection when browsing through different reviews (Case 62266)
- fixed --- Handle Line wrapping (Case 61829)
- fixed --- reduce download size of Review Summary page by ~65% for large Reviews
- fixed --- Fix accessibility issue: add "alt" property to images (Case 62154)
- fixed --- Disabling filters for action items and adding loading indicator when the table is yet loading (Case 62232)
- fixed --- Perform "renumber changelists" script hangs (Case 62206)
- fixed --- Reports page SQL and CSV links now working in IE browsers (case 61805)
- fixed --- Changed check for unchanged files so it only checks if the client has any open files (Case 61949)
- fixed --- edits now work on change-content-trigger (Case 61958)
- fixed --- links in redacted comments now look more redacted (Case 61840)
- fixed --- Hidden error popups block "init database" screen in debug mode (Case 61636)

- fixed --- Review summary page performance improvements (Case 61501)
- fixed --- Line wrapping corrected in diff viewer (Case 61829)
- fixed --- Ignoring trailing strings after performe year.release-number string in order to retrieve support for shelvesets correctly (Case 61812)

7.0.7027 - March 19, 2012

- fixed --- replaced accessibility tag information (Case 62154)
- fixed --- http proxies should now work with /contentupload (Case 61786)
- fixed --- renames causing TimeBuilder to error. (Case 62317, 62359)
- fixed --- Performe "renumber changelists" script hangs (Case 62206)
- fixed --- Fixed typo in approve message (Case 62224)
- fixed --- No Admin phone number causes Menu options still in V6 format to disapper (case 61914)
- fixed --- Support Surround dates with '.' separators (case 62034)
- fixed --- Archive Content Cache should go away (Case 61901)
- fixed --- Added specific client to fstat and resolved commands when executing from a different client (case 61752)
- fixed --- Ignoring trailing strings after performe year.release-number string in order to retrieve support for shelvesets correctly (Case 61812)
- fixed --- Typo in CC licensing message (Case 61582)
- fixed --- 7.0 UI: "An unexpected error occurred" should not be presented for user errors (case 61605)
- fixed --- Approving a review when unread comments are loaded causes an error (case 61660)
- fixed --- RTC plugin failed to create review with long title (case 61740)

7.0.7024 - February 17, 2012

- added --- UI tweaks for diff viewer chat panel (Requirements 101488)
- fixed --- Menu headers are now correctly aligned and "Home" image (Case 61820)
- fixed --- Added links to several manual pages for added GIT information (61679)
- fixed --- RTC plugin failed to create review with long title (case 61740)

- fixed --- Approve button is disabled when there is nothing more to do. (case 61710)
- fixed --- Error with svn 1.7 when user does not have access to repo root (case 61682)
- fixed --- User is erroneously prompted to configure full name if full name and login name match (Case 61639)
- fixed --- Display better error message in web popup
- fixed --- Installer appears to hang when DB port is set to empty (Case 61692)
- fixed --- Show better error message if database misconfigured (Case 61657)
- fixed --- Commit from TFS reviews in a single changeset (case 61723)
- fixed --- Diff Compare Dropdown Is Broken (case 61549)
- fixed --- User has 'You have not configured' action item if full name matches login name (Case 61639)
- fixed --- Login names with spaces in them get munged oddly on logout (Case 61329).
- fixed --- We do not have a reject review button in Eclipse plugin (Case 61432)
- fixed --- Changelists displayed in wrong order by automatic refresh (case 61411)
- fixed --- Show "Loading" indicator while loading large reviews
- fixed --- Messaging and documentation describing incompatibility with MKS on 64-bit Windows JRE (cases 60680, 60968, 61326, 61333)
- fixed --- Debug Logging is not capturable on the Initialize DB screen (Case 61352)
- fixed --- Changing phase of authors that upload files after review has been started (Cases 60947, 60720)
- fixed --- Reduce server load of refreshing Review Summary page
- fixed --- The review summary shows the materials in one order but the diff viewer considers the materials in a different order. (case 61465)
- fixed --- Minimally sized GUI screen does not show Existing Reviews field (Case 61018)
- fixed --- addgitdiffs fails with Unexpected Exception (NPE) when not used in a git repository (Case 61424)
- fixed --- Log "long query" warnings on prepared statements
- fixed --- New Server Fails to get License w/o feedback (Case 61023)

- fixed --- Eclipse plugin allows you to begin review without setting a mandatory custom field (Case 56850)
- fixed --- Support Surround one-line changelist history records (case 61311)
- fixed --- Ignore StarTeam 'no revision of file' errors (case 61212)
- fixed --- File Extension issue on Print to Review attached files (Case 61316)
- fixed --- Another minor display issue with Custom Field (Case 60946)
- fixed --- Command 'admin review finish' displays previous phase name (Case 61327)
- fixed --- Mandatory subscriptions allowing changing of roles and sending multiple notifications on attempts to remove mandatory users (case 60176)
- fixed --- do not clobber 'External URL' on startup (Case 61435)
- fixed --- Improper cache headers require manual refresh (Case 61435)
- fixed --- Support Surround one-line changelist history records (case 61311)
- fixed --- Display shorter timestamps in chat, with detail on hover
- fixed --- Suppress extra defect expando header outline (Case 61412)
- fixed --- Use configured git-exe path (case 61385)
- fixed --- Rework counter showing incorrect values (case 60943)
- fixed --- NPE when adding empty changeset to review with RTC (Case 61255)
- fixed --- Removing duplicate versions from the timeline (case 60337)

7.0.7022 – 7.0 Initial release! January 31, 2012

* FIRST RELEASE OF v7.0! *

Major features:

- A fully revised and streamlined user interface
- Hierarchal custom fields
- Support for Perforce shelve sets
- Support for Git changelists

- Support for ClearCase plugin using CodeCollaborator Eclipse plugin
- Option to provide users with option to reject a review
- Ability to log debug information from Eclipse plugin

- added --- automatically list local (not in upstream) git commits in GUI
- added --- gitaddbranch to automatically add diff of what is in a branch that is not upstream as one squashed diff
- added --- review security option to allow participants and group members (inclusive) access to reviews
- added --- added Defect log to the review summary page
- added ---remember Participants section "Group by" settings
- fixed --- now correctly parse SVN server certification error messaging (case 60790)
- fixed --- support ClearCase Zulu format date strings (case 60137)
- fixed --- now correctly parse svn server certification error messaging (case 60790)
- fixed --- eclipse plugin chooses wrong default previous version (Case 60409)
- fixed --- validate content on client before caching. (Case 60157)
- fixed --- creator can now begin reviews via eclipse or command line even if they are not an author (case 59171)
- fixed --- download Diff does not properly handle (ignore) binary files (Case 59631)
- fixed --- ignore CVS banner in stderr (Cases 59676, 60698)
- fixed --- blank screen when logging in for some users (case 60602)
- fixed --- error with Subversive/JavaHL when no access to repo root (Case 60265)
- fixed --- check version before executing shelve commands (case 60569)
- fixed --- reworked file now shows correct status (Case 60025)
- fixed --- added functionality to delay review loading after executing changes page (Case 58880)
- fixed --- TFS en_CA date now parses correctly (Case 60231)

- fixed --- limit width of "Fun Facts" box (Case 59959)
- fixed --- Get content of non-local resources in Eclipse even if out of sync (Case 60129)
- fixed --- Eclipse plugin update now correctly supports all versions (Case 57778)
- fixed --- null pointer exception in Eclipse client (Case 58849)
- fixed --- different OS's can now add the same file to a review without causing problems due to different line endings (Case 59412)
- fixed --- "Suppress Notification" checkbox stays checked (Case 59164)
- fixed --- OOBE when changelist is empty (Case 61404, Case 61382)
- fixed --- Retain external URL on startup (Case 61453)
- fixed --- Eliminate manual refresh of cached headers (Case 61435)

11.2.7 Version 6

6.5.6510 – July 25, 2012

- added --- Support for additional file extensions for Gosu and xml file types (Case 64942)
- fixed --- Chat History and Review Materials sections display correctly (Case 64534)
- fixed --- Obfuscated dumps can now be imported (Case 63339)
- fixed --- Fix web mode parameter -s for Synergy (Case 63794)
- fixed --- Line number linkification corrected (Case 57351)
- fixed --- Support CVS 1.12.9 date format (case 64129)
- fixed --- Added files in Surround committed changelists are no longer blank (case 64149)
- fixed --- Syntax highlighting failure no longer means php file will not display in Code Collaborator (Case 63930)
- fixed --- Eliminated Subclipse NPE on file with Subversion missing status (case 63812)
- fixed --- TFS implementation correctly parsing Canada locale date (case 63288)
- fixed --- List reports correctly displayed (case 63480)
- fixed --- TEE shelvesets now supported (Case 60306)
- fixed --- 'Page 1 does not exist in this document' message opening Print To Review .pdf (case 61316)

- fixed --- Update CCRC .jar filename in manual (case 63047)
- fixed --- http proxies do not like /contentupload (case 61786)
- fixed --- Performance improvements for diffcache misses. (Case 62893)
- fixed --- CollabExternalDiff viewer works if the version/changelist ID contained invalid filename characters (case 62184)
- fixed --- Browse command works in batch when called with global option no-browser.

6.5.6508 – March 26, 2012

- fixed --- Fixed class cast exception while checking for empty default changelist(62079)
- fixed --- Ignoring trailing strings after perforce year.release-number string in order to retrieve support for shelvesets correctly (Case 61812)
- fixed --- Added specific client to fstat and resolved commands when executing from a different client (case 61752)
- fixed --- Reports page SQL and CSV links not working in IE browsers due to IE URL character limits (case 61805)
- fixed --- Changed check for unchanged files so it only checks if the client has any open files, to avoid error when there is none. Changed submitted version fstat check to include the version number. Added unit tests (Case 61949)
- fixed --- edits do not work on change-content-trigger. Also added test case (Case 61958)
- fixed --- Support Surround dates with '.' separators (case 62034)
- fixed --- renames no longer cause TimeBuilder to error. (Case 62317, 62359)

6.5.6507 – February 17, 2012

- fixed --- SVN 1.7 support when user does not have access to repo root (61682)
- fixed --- Commit from TFS reviews in a single changeset (Case 61723)
- fixed --- Messaging and documentation describing incompatibility with MKS on 64-bit Windows JRE (cases 60680, 60968, 61326, 61333)
- fixed --- Changing phase of authors that upload files after review has been started (Cases 60947, 60720)
- fixed --- Minimally sized GUI screen does not show Existing Reviews field (Case 61018)
- fixed --- New Server Fails to get License w/o feedback (Case 61023)

- fixed --- Another minor display issue with Custom Field (Case 60946)
- fixed --- Support Surround one-line changelist history records (case 61311)
- fixed --- Ignore StarTeam 'no revision of file' errors (case 61212)
- fixed --- rework counter showing incorrect values (case 60943)
- fixed --- NPE when adding empty changeset to review with RTC (Case 61255)
- fixed --- test case for TimelineGenerator fixed (case 60337)
- fixed --- Removing duplicate versions from the timeline (case 60337)
- fixed --- Mandatory subscriptions allowing changing of roles and sending multiple notifications on attempts to remove mandatory users (case 60176)
- fixed --- Erroneous Concurrency Exception during DB init. (Case 60682)
- fixed --- Now correctly parse svn server certification error messaging (case 60790)
- fixed --- Problem disabling admin account
- fixed --- Support ClearCase Zulu format date strings (case 60137)
- fixed --- Can no longer change the role of a user who is in a review due to mandatory subscription
- fixed --- Error parsing regional (Canada) date(Case 60137), Review # 6095.
- fixed --- Eclipse plugin chooses wrong default previous version. (Case 60409)
- fixed --- PeerReview client installer copies CCRC .jar files to wrong location
- fixed --- Validate content on client before caching. (Case 60157)
- fixed --- Svn URL's are now properly encoded if there are special characters within a filename

6.5.6505 – December 21, 2011

- added --- SVN 1.7 support (Case 59698)
- added --- Updated Eclipse support
- fixed --- Ignore CVS banner in stderr (Case 59676, 60698)
- fixed --- Blank screen when logging in for some users (Case 60602)
- fixed --- Error with Subversion/JavaHL when no access to repo root (Case 60265)

- fixed --- Updated documentation for null return in IP4Conn (Case 60569)
- fixed --- Check version before executing shelve commands (Case 60569)
- fixed --- Reworked files no longer show status as reverted (Case 60025)
- fixed --- Properly support old style p4 renames (Case 60294)
- fixed --- Add to Review P4V integration no longer populates add to existing review (Case 58880)
- fixed --- Conversations added to Review Summary now update correctly
- fixed --- TFS en_CA data parses correctly (Case 60231)
- fixed --- Get content of non-local resources in Eclipse even when out of sync (Case 60129)
- fixed --- More logging exceptions are without stacktraces (Case 60041)
- fixed --- Eclipse plug-in versions now appear correctly (Case 57778)
- fixed --- Ignore warnings about EOL-style from Git (Case 60112)
- fixed --- Eclipse client no longer produces NPE when trying to load comments (Case 58849)
- fixed --- Suppress Notification checkbox stays checked (Case 59164)

6.5.6503 – October 25, 2011

- added --- Users can now ignore 'accepted' comments in comment count (Case 59072)
- fixed --- Adding the same file from different operating systems no longer breaks a review (Case 59412)
- fixed --- Support adding files from ClearCase view-private directories (Case 58637, 59735)
- fixed --- Corrected a parsing error in pending tasks (Case 57096)
- fixed --- Rework counter showing incorrect values (Case 59553)
- fixed --- VSS reviews will no longer hang (Case 59048)
- fixed --- Line parser out-of-bounds exception corrected.
- fixed --- P4 diffs correctly identifies before/after paths (Case 59166)
- fixed --- Support ISO formatted TFS dates (Case 59242)
- fixed --- Authors can no longer be disabled for reviews (Case 58629)

- fixed --- Browse now takes the user to the review materials page instead of new review page if a review exists (Case 58501)
- fixed --- Bad URL's no longer break the review material page (Case 57559)
- fixed --- Correctly respect symlinks in web UI for SCM configuration (Case 59277)
- fixed --- Will now select the correct ClearCase version when addversions has no previous (Case 58988)
- fixed --- Corrected PRC manual favicon (Case 58624)
- fixed --- admin batch version-spec now handles filenames with spaces (Case 58988)
- fixed --- Corrected issue with max number of reviewers (Case 58709)
- fixed --- Action items and search results now respect permissions (58315)
- fixed --- Updated GUI screenshots for Synergy (Case 51728)
- fixed --- Grammar error in server installer authentication page (Case55791)
- fixed --- Time spent reviewing is now correct when doing code reviews (Case 54486, Case 56510)
- fixed --- Open commit reminders from a deleted review will no longer send the user to a blank home screen (Case 59137)
- fixed --- Corrected poking behavior for completed reviews.
- fixed --- Version content already set bug

6.5.6502 – September 9, 2011

- added --- PeerReview Complete will now import database exports from CodeCollaborator as long as minor version/build numbers match.
- added --- Updated manual to include alternate SSL option (Case 58976)
- added --- Syntax parsing for Gosu
- added --- Configuration options for synergy web-mode.
- fixed --- Search results, even by review ID, will not display reviews that the user does not have permission to access (uservice request)
- fixed --- Updated manual screenshot for Synergy (Case 51728)
- fixed --- Surround committed changelist paths do not start with '/' (Case 56730)

- fixed --- Grammar error in server installer authentication page (Case 55791)
- fixed --- Time spent reviewing is now correct. (Case 54486, Case 56510)
- fixed --- Home page will no longer be blank when a review with an open commit reminder is deleted (Case 59137)
- fixed --- Date in version history for 6.5.6501 now correctly shows as 2011.
- fixed --- Better sorting of case-only changes in Ensure Content Reviewed Trigger (Case 58645)
- fixed --- Correctly handle Surround en_GB dates and fixes for history command parsing (Case 58882)
- fixed --- "Unlimited" number of reviewers is now limited to 100,000. (Case 58709)
- fixed --- Zooming in on a very large PDF that strains memory limits will now produce a friendly error message. (Case 57205)
- fixed --- Button text should now be consistent across reports. (Case 58794)
- fixed --- Accurev uploads should no longer complain about an A:\ drive. (Case 58982)
- fixed --- Updated System Status forms to remain within allotted space (Case 57616)
- fixed --- Print To Review 'File does not exist' error. (Case 58931)
- fixed --- No longer prevented from marking comments read/accepted when two comments collide on the same line of a diff. (Case 57504)
- fixed --- Users are no longer blocked from editing a review after it is due. (Case 53495)
- fixed --- Report Access Security no longer fails with Oracle. (Case 58794)
- fixed --- Fixed a file upload issue with TFS that had files showing up as if they had no content. (58738)
- fixed --- PRC server installer links to the correct online manuals. (Case 57677)
- fixed --- Rework/rebase counter on review overview page. (Case 57203)
- fixed --- Custom defect names should now show up everywhere that the defect label is used. (Case 58524, Case 57569)
- fixed --- Next button should now work when looking for defects. (Case 58542)
- fixed --- Added diagnostic to eliminate dangling user references. (Case 58213)
- fixed --- VHDL syntax highlighting.

6.5.6501 – August 22, 2011

- added --- [ClearCase Remote Client \(CCRC\) Support](#)^[584]
- fixed --- File upload issue resulting in empty files.
- fixed --- NPE adding TFS files that have empty comments to review (Cases 58196, 58397, 58411)

6.5.6500 – July 22, 2011

* FIRST RELEASE OF v6.5! *

Major features:

- [Report Access Security](#)^[175] features
- Improved file upload support

- added --- New vmoptions to adjust when review auto-update is disabled.
- added --- Users can now add changelists to a review if the regex matches the review (Case 57989)
- added --- Support for Eclipse alternate file systems
- added --- New Report Access Security
- added --- Support for batching XMLRPC requests
- fixed --- Eclipse plugin now correctly referenced in PRC server (case 58623)
- fixed --- Fixed a problem where going to a nonexistent review would create a NPE. (Case 57456)
- fixed --- Converted a help link which opened an XML file to raw text to compensate for browser incompatibility (Case 58547)
- fixed --- Improved error messages if group synchronization fails to parse correctly
- fixed --- Corrected a link on the Admin panel that was opening the wrong help section (Case 57780)
- fixed --- Corrected some online manual links that resulted in 404 errors (Case 57677)
- fixed --- Running 'addgitdiffs' on a bare repo will no longer create a NPE (Case 58240)

- fixed --- Corrected issue with Subclipse and SVN 'mergeinfo' support (Case 57555)
- fixed --- Updated change type in already existing versions for TFS (Case 57371)
- fixed --- Changed diff uploads to use streams
- fixed --- Updated fun facts to be more generic (Case 57972)
- fixed --- Several corrections to the owner's manual
- fixed --- Corrected missing space in 'ccollab addversions' documentation (Case 57964)
- fixed --- Removed request for 'mergeinfo unsupported' error with Subversive (Case 57555)
- fixed --- Corrected '%1 is not a valid Win32 application' error when installing Print To Review (Case 58006)

6.1.6104 – May 25, 2011

- added --- support Subversive 0.7.9.20110207-1700
- fixed --- More logging during server startup
- fixed --- Server triggers replacements failed for custom fields with whitespace (Case 57516)
- fixed --- All Defects report filtered by group did not show defects (Case 57033)
- fixed --- License expiration date is now always displayed in UTC with clear timezone indication (Case 57473)
- fixed --- TFS changeset deletes not showing as deleted (Case 51361, 57371)
- fixed --- Error processing filenames containing ampersands on windows (Case 57437)
- fixed --- Remove spurious extra logging in Eclipse plugin
- fixed --- Poor write performance when content-cache is located on a network share
- fixed --- Parsing of StartTeam diff filenames with embedded spaces (Case 57197)
- fixed --- Error reviewing subversion revision 1
- fixed --- Parse Surround history output with multiple continuation lines (Case 57288)

6.1.6103 – April 15, 2011

- added --- Installers for 64-bit JVMs on Windows

- fixed --- Print To Review not deleting image files on cancel (Case 54914)
- fixed --- "Download Diffs" fails for large reviews. (Case 56889)
- fixed --- "Download Diff" link now checks SCM permissions. (Case 57110)
- fixed --- "Open in external diff viewer" link now checks SCM permissions. (Case 57110)
- fixed --- Ticket verification should be case-insensitive (Case 57058, 57075)
- fixed --- Eclipse plugin Defect links truncated
- fixed --- Eclipse plugin should post chat asynchronously
- fixed --- Remove ccollab-cvs trigger from installer (Case 56876)
- fixed --- Support SourceGear Vault Professional Edition (Case 56205, 56737, 56863)
- fixed --- Fix Surround 'Archive error: -9014'
- fixed --- "Suppress Notification" checkbox does not stay checked. (Case 56929)
- fixed --- Chat pane does not load for binary files (Case 56749)
- fixed --- Support path-based access control for Apache-based Subversion servers (Case 56657)
- fixed --- Support blank option values on the command-line
- fixed --- attachments via web UI fail (Case 56783)
- fixed --- TFS commit issue (Case 56528)
- fixed --- TFS shelvesets author check should be case-insensitive (case 56436)
- fixed --- NPE when file has no base version (Case 56553)
- fixed --- NPE on alternate git status text (Case 56443)

6.1.6102 – March 9, 2011

- fixed --- Server fix for broken `ccollab admin wget` and Eclipse plugin w/ MySQL or Oracle. (Case 56315)
- fixed --- Add product name to password prompt dialog
- fixed --- Fix AppSetting not found error configuring Studio Addin for debug

- fixed --- Overwrite stale ticket in GUI client and Eclipse (Case 56426)
- fixed --- Error committing Subversion file with spaces (Case 56534)
- fixed --- Older (4.0) clients depleted database connection pool. (Case 56568)
- fixed --- Invalid regular expression in ExtJS (Case 55848)
- fixed --- RTC integration missing icon
- fixed --- NPE refreshing Review Summary Page (Case 56462)
- added --- Support MKS Source Configuration Path project types (Case 56327)

6.1.6101 – February 22, 2011

* FIRST RELEASE OF v6.1! *

Major features:

- Tasktop Certified Mylyn Integration
- Ticket-based logins
- Support Subversive Eclipse Subversion plugin

6.0.6018 – February 18, 2011

- fixed --- do not limit reviews to N changelists (Case 56011)
- fixed --- Eclipse Review Editor errors "Graphic is disposed" (Case 56393)
- fixed --- Attachments should be archived with other clients.

6.0.6017 – February 11, 2011

- fixed --- satisfy TaskTop requirement that the error icon used in the collaborators section of the review editor should be the one commonly used in eclipse
- fixed --- satisfy TaskTop requirement that required custom fields be decorated with a warning instead of an error icon.

- fixed --- LDAP auth with DOMAIN/username broken (Case 55481)
- fixed --- Browser hangs loading native document conversations (.doc file) (Case 56253)
- fixed --- typo in documentation for 'ccollab logout'
- fixed --- TFS deleted files showing as initial (Case 55981)
- fixed --- Case 56253
- fixed --- Explicitly support "M/d/yy h:mm:ss a" when parsing Surround changelists, instead of expecting this to be the default system date format (Case 56079)
- fixed --- AddFiles should not attempt to add a base version (Case 56157)
- fixed --- do not require Eclipse CVS plugin (Case 56175)
- fixed --- Supply Subversion username and password when adding arbitrary diffs
- fixed --- Allow users to further configure dynamic reports before running them. (Case 54888)
- fixed --- Dynamic reports will show more useful URL's in the URL bar if possible.
- fixed --- Apply and OK buttons disabled in the GUI client (Case 56120)
- fixed --- NullPointerException adding pending changelist with Eclipse plugin (Cases 55998, 56080)
- fixed --- remove extra prompt for password on ccollab login
- fixed --- Rename products in manual.
- fixed --- do not require access to Subversion repository root (Case 53783)
- fixed --- do not require access to Subversion repository root (Case 53783)
- added --- Support Vault Professional and 5.1.1 release (Case 56205)
- added --- diagnostic to add users to ALL_USER group if they are not already in it (Cases 56090, 56101). this is an empty commit because the original commit
- added --- documentation for \$review.defectlog variable (Case 56196)

6.0.6016 – January 19, 2011

- added - Respect Subversive Plugin "Do not select externals" preference
- added - Subversion 'svn-recurse-externals'^[710] option to recurse in to svn:externals directories

- added - Subversion [svn-auto-add](#)^[710] global option to treat unversioned files as "added"
- added - Better command-line messages for ccollab admin group member add
- added - [review_activity_summary](#)^[812] columns: active_reviewer_hours, passive_reviewer_hours (Case 55374)
- added - Print To Review 64-bit driver (Cases 55373, 54985, 52098)
- added - Extra logging around search
- added - Support for Team Foundation Server 2010 (Case 54907 and others)
- added - Radio buttons for Clearcase "Add versions" GUI file selection usability (Case 50471)
- added - Support [Subversive](#) Eclipse Subversion plugin
- added - Diagnostic to clean up duplicate values in metadatavalue* tables (Case 55633)
- added - Prompt from eclipse client and standalone GUI when bad auth credentials prevent succesful server responses.
- fixed - Handle TFS Russian date formats (Case 55797)
- fixed - Bad warning message when uploading unversioned file using 'ccollab addfiles'
- fixed - Suppress messages going to Subclipse console
- fixed - Error committing Subversion files in added directories
- fixed - Prevent duplicate Group members (Case 55623)
- fixed - Delete duplicate Group members in Fix Database Data diagnostic
- fixed - Eclipse [resource decoration](#)^[483] and [defect markers](#)^[483] fail to update
- fixed - Eclipse "Add to Review" menu item in Synchronize View missing for CVS and Subversion
- fixed - Exception when running "List Reports" in Oracle (Case 55721)
- fixed - GUI Client Git "Add changes" does not canonicalize filesystem path (Case 54598)
- fixed - NPE in "Add changes" when adding from subdirectory of Git repo (Case 55676)
- fixed - Handle missing Perforce 'haveRev' better (Case 55458)
- fixed - Reviewer can incorrectly finish until file activity (Case 55456)
- fixed - Reworked files showing 'Initial' status (Case 55557)

- fixed - NPE in installer during ROOT.xml generation (Case 55578)
- fixed - Better error message when LDAP authenticated user has not logged in to the web UI (Case 55538)
- fixed - RTC server plugin fails to create review when files paths cannot be constructed (Case 55547)
- fixed - Error saving Review custom fields in Eclipse plugin
- fixed - Performance - Only search "user" comments, not system comments
- fixed - Skip change set links that are missing a workspace hint in RTC Server Plugin
- fixed - Translate ClearCase LATEST to actual version
- fixed - Try harder to not run out of memory when running Perforce commands (Case 46879)
- fixed - Tray Notifier always thinks there are new Action Items
- fixed - Can not add pending Perforce changelist from Eclipse Plugin (Case 55064)
- fixed - Improve initial load speed of diff page (Case 55306)
- fixed - Command-line process execution fails with msysgit (Case 55322)
- fixed - Collapse paths in tree when selecting locally modified files in "Add versions" UI (Case 50471)
- fixed - Stop storing password supplied at command line prompt in config file
- fixed --- ClassCastException in "Fix Duplicate Users Differing By Case" Diagnostic. (Case 55910)

6.0.6013 – November 17, 2010

- added --- Support KB, MB and GB suffixes for smartbear.collab.upload.truncate.size (Case 54922)
- added --- Eclipse plugin support for reviewing URL's
- added --- Show "pins" in Eclipse Compare Editor for images and documents
- added --- Support for document review in Eclipse plugin
- added --- The assignment_state database view describes actioncodes in the assignment table. (Case 55049)
- added --- Find changes on ClearCase branch for Add Versions (Case 50471)

- added --- Edit participant custom fields in Eclipse plugin Review Editor
- added --- New "ccollab admin review edit --participant-custom-field" option
- added --- Clearcase: UI for add versions from branch (Case 50471)
- added --- Ability to "Poke" a Review participant in the Eclipse Plugin
- added --- Eclipse Plugin Review Editor show participant state using icons and font
- added --- Support Vault 5.0.4/Fortress 2.0.4 (Case 54773)
- added --- Double-click an entry in the Eclipse plugin Review Editor defect log to open the associated file
- added --- Show extended information in Eclipse plugin Review Editor defect log tooltip
- added --- "File" and "Location" columns in Eclipse Review Editor defect log section
- added --- Specify custom label for conversations in Eclipse Plugin
- fixed --- Throttle error messages about old/unsupported clients. (Case 55194)
- fixed --- Next/prev buttons in diff viewer failed after changing version comparison. (Case 55166, 54870)
- fixed --- NPE when converting null dates to strings (Case 55179)
- fixed --- Initial setup page changed user logins instead of adding new users. (Case 54771)
- fixed --- Support non-English locales with Subclipse integration (Case 55185)
- fixed --- Allow single-word user names (Case 54528)
- fixed --- Version change without content change shows 'Uploaded File' instead of change metrics (Case 55130)
- fixed --- Wrong version uploaded for ClearCase activities with unordered changes (Case 54648)
- fixed --- Change server.xml defaults to improve server behavior under load
- fixed --- Upgrade Tomcat to 6.0.29
- fixed --- NPE updating defect markers in Eclipse plugin (Case 55064)
- fixed --- User selections should include user logins for disambiguation
- fixed --- Links in dynamic reports were broken on first page load. (Case 54934)
- fixed --- Respect custom field phase visibility in Eclipse Plugin

- fixed --- Review overview fails to load - NPE with empty label location on Oracle backend (Case 54839)
- fixed --- Client installer removes other P4V custom tools (Case 54448)
- fixed --- Improve 'Invalid ClearCase version' message (Case 54975)
- fixed --- Visual Studio Addin unloads when solution is closed (Case 52634)
- fixed --- Visual Studio Addin should display error message if nothing to do (Case 54661)
- fixed --- Eclipse plugin mangles multi-line text custom fields (Case 54867)
- fixed --- Wrong base version for Vault rolled back versions (Case 53902)
- fixed --- Eclipse Plugin Review Editor NPE with CodeReviewer (Case 54790)
- fixed --- Prevent MKS host name truncation (Case 53470, 54780)
- fixed --- Prepopulate Print To Review document name (Case 54123)
- fixed --- Defect Custom field order not respected (Case 54717)
- fixed --- P4V integration does not prepopulate review title (Case 54449)
- fixed --- New comment text box in Eclipse plugin does not expand correctly as you type
- fixed --- Error uploading reverted CVS file in Eclipse plugin (Case 54587)
- fixed --- Be more lenient for administrator full names in support of non-Latin-1 character sets (Case 51433)
- fixed --- Error using relative paths with 'ccollabgui addchanges' (Case 54459)

6.0.6012 – October 1, 2010

- added --- Documentation for content-cache format prop file
- added --- Compare against any local file in Eclipse plugin
- added --- Select line in Eclipse plugin Compare Editor when conversation focused in Conversations View
- added --- Compare against any local file in Eclipse plugin
- added --- "Refresh" button to Eclipse Review Editor
- added --- Display links for URL's and emails in Eclipse Plugin Conversations View

- added --- Links in Eclipse Plugin Conversations View
- added --- Links in Eclipse Plugin custom fields and defect text
- added --- Linkify-as-you-type in Eclipse Plugin
- added --- Display Review ID in "Add To Review" wizard confirmation page (Case 54371)
- added --- Log IP address of old clients (Case 54392)
- added --- New reporting views. (Case 54438)
- added --- Option to suppress notifications by type/template
- added --- Interim 'ccollab logout' command that clears password (Case 54065)
- fixed --- HTML markup displayed in Eclipse plugin 'Moving On' section
- fixed --- Multi-selected files not uploading from addin
- fixed --- Defect links and comment box sometimes disabled improperly in Eclipse plugin
- fixed --- do not mark review editor dirty just because custom field values are not yet assigned
- fixed --- NullPointerException committing from tray notifier
- fixed --- Eclipse Review Editor "Moving On" section missing controls after pressing "Begin Review"
- fixed --- Make Conversation ruler background color match file in Eclipse Compare Editor
- fixed --- Missing checked graphic in diff viewer
- fixed --- Eclipse plugin Compare Editor "Too Many Differences" error"
- fixed --- Erroneous Concurrency Exception on upgrade (Case 54087)
- fixed --- Can no longer create multiple custom fields that differ only by case (Case 54087)
- fixed --- Corrected features-not-supported-in-CodeReviewer list
- fixed --- Email notifier log message says "seconds" instead of "milliseconds"
- fixed --- Display image for file type in Eclipse Compare Editor
- fixed --- Prefs page fails to render tabs in IE7
- fixed --- In Notification Template admin screen, sort the templates by display name.
- fixed --- Make 'browser' global option case-insensitive (Case 50407)

- fixed --- Keep Eclipse Plugin Action Items View and Editors in sync
- fixed --- Use custom label for "Defect" in Eclipse Plugin
- fixed --- Eclipse plugin "Could not get defect attribute from defect marker" error (Case 54349)
- fixed --- Sort next file/previous file the same as the review overview screen, collating case (case 54132)
- fixed --- p4 \r\r\n line endings confuse ensure-content-reviewed trigger (Case 54213)
- fixed --- Better error messages for Eclipse Plugin (Case 54350)
- fixed --- do not overwrite file content when restoring from backup (Case 54401)
- fixed --- Installer should automatically replace old P4V custom tool definitions (Case 54450)
- fixed --- Updated manual to document all views. Corrected view name to: defects_by_path (Case 54437)
- fixed --- Dynamic Defect Report filter by Review Completion Date (Case 54226)
- fixed --- Error upgrading server if no diffs cached (Case 54381)

6.0.6011 – September 8, 2010

* FIRST GA RELEASE OF v6.0!

Note: 6.0 Beta clients (6.0.6001 - 6.0.6009) are not compatible with the GA 6.0.6011 server (5.0 clients *are* compatible with 6.0.6011 server). If you were using a 6.0 beta client please upgrade your client to the GA version 6.0.6011.

- added --- do not allow saving password via ccollab set (use ccollab login instead)
- fixed --- [Group Admins](#)^[217] may delete groups they admin (Case 52208)
- fixed --- Last Comment shows if [redacted](#)^[389] (Case 53732)
- fixed --- Error entering new Comments on "[local file](#)^[483]" version in Eclipse plugin (Case 53820)
- fixed --- Create distinct changelists for unmanaged files uploaded via ccollab addfiles (Case 52713)
- fixed --- Append indicator page to end of truncated Print To Review documents

- fixed --- do not allow new conversations when comparing against changed [local file](#)^[483] in Eclipse plugin
- fixed - Eclipse plugin [Defect Markers](#)^[483] and [Label Decorations](#)^[483] do not clear when Review deleted
- fixed - Print to Review displays "No Title" error (Case 53929)
- fixed --- NPE on Review Detail Report (Case 53682)
- fixed --- User Reports specify "System Admin" instead of ambiguous "Admin" (Case 53084)
- fixed --- Removed unused 'issue' table (Case 52652)
- fixed --- ccollab addchanges --diffbranch option should not return CHECKEDOUT versions (Case 53680)

6.0.6009 – August 8, 2010

- added --- New file content store format for better FS performance.
- added --- Print To Review and Studio Addin launch 'Add To Review' GUI wizard
- added --- Enable log level management through JMX
- added --- External diff launcher preset for BeyondCompare on Linux
- added --- Supported browsers now include Chrome
- added --- Display graphical UI for P4V integration
- added --- P4V integration upload multiple changelists at once
- added --- Show user login to disambiguate user names on Group admin page (Case 53589)
- added --- Click on a line in the Eclipse compare viewer and start typing to add comment
- fixed --- Added troubleshooting info to the manual for p4v/p4win plugin (Case 53579)
- fixed --- Added keyboard shortcuts for GUI client to manual (Case 53578)
- fixed --- Eclipse client new chat box does not size correctly with trailing line feed on Windows (Case 52804)
- fixed --- Review completion from the command line ignores unset required participant custom fields. (Case 51714)
- fixed --- Role Configurations cannot be created (Case 53418)

- fixed --- Double-click entry in Eclipse diff's structure view and the window shifts to the right (Case 51590)
- fixed --- SCM Configurations show bogus local path
- fixed --- Install P4 Plugins checkbox should be checked by default if Perforce installed.
- fixed --- Support redacted comment update in eclipse plug-in
- fixed --- Documentation on how to change the file cache location (Case 47974)
- fixed --- Restrict Uploads to Review cannot be changed on review edit (Case 52417)
- fixed --- Show redacted comments as redacted on review overview
- fixed --- Add documentation for configurable server log settings (Case 50107)
- fixed --- Comments sort in wrong order in document review. (Case 53540)
- fixed --- "Fix Defects" phase now uses custom label for Defects.
- fixed --- Eclipse client allows you to "wait" when you are already waiting (Case 51559)
- fixed --- Group member edit list of members is too narrow in IE (Case 50184)
- fixed --- ccollab admin review wait is --until argument is now optional; defaults to Any
- fixed --- Include disabled and reporting-only Groups in Review report filter
- fixed --- Organize Groups on Admin->Groups page (Case 53586)
- fixed --- Change the accepted version icon in the pulldown to differ by more than just color
- fixed --- Display "not yet supported" message for "Live URL" files in Eclipse Plugin
- fixed --- "Concurrency Exception" after system upgrade. (Case 53621)
- fixed --- Select current location when clicked in right side of Eclipse compare viewer
- fixed --- Update top-level Git page in manual (case 53395)
- fixed --- Focus correct conversation control when new conversation started in Eclipse client

6.0.6008 – August 6, 2010

- fixed --- Eclipse update site URL in 6.0 zipped update site pointing to 5.0

- fixed --- Addin under VS 2010 (cases 51282, 52100, and 53275)
- fixed --- Eclipse plugin "Recent Participants" have the wrong Role
- fixed --- Make clearcase addversions wizard upload multiple versions at a time
- fixed --- Restrict Access to Review has inconsistent wording (Case 52444)
- fixed --- Removed broken "Revert" buttons from Group Admin page
- fixed --- PHP not syntax highlighted when opening <?php is not closed (Case 50039)
- fixed --- In document review, clicking on a different page's comment does not select that comment (Case 52470)
- fixed --- Display an error on review edit when not all required assignments are present (Case 52008)
- fixed --- Diff viewer keyboard shortcuts help does not work in Chrome (Case 51820)
- fixed --- Eclipse client custom field error decoration clipped in Review Editor
- fixed --- Eclipse Review Editor appears dirty if string custom field is empty
- fixed --- Group selection does not appear in review editor if no group is assigned (case 52872)
- fixed --- ClearQuest activity review titles should default to headline (case 49180)
- fixed --- Use first commit hash as Git repo identifier
- fixed --- Allow non-ascii characters in username/password field (Cases 51434 and 52406)
- fixed --- Sort files alphabetically in GUI client "Add Changes" wizard (Case 53067)
- fixed --- Typos in documentation of "ccollab admin batch" command (Case 52711)
- fixed --- Redacted comments should not be counted or displayed in reports (Case 52256)
- fixed --- Alphabetize users and groups on Group edit page (Case 53067)
- fixed --- Redacting a comment on zoomed image resizes image (Case 52277)
- fixed --- Spurious P4V addons message at end of install process (Case 48043)
- fixed --- Move restrict process options to access restrictions section (Case 49848)
- fixed --- Error uploading Subversion revisions with directory changes in Eclipse Plugin
- fixed --- Performance - Case insensitive string indexes in Oracle (Case 52392)

- fixed --- Content Archive queries do not scale well
- fixed --- Enforce administrator dump restriction at dump time, not just display time
- fixed --- Surround changelist date AM/PM concerns (case 52522)
- fixed --- Default Value for Participant Custom Field broken (Case 52082)
- fixed --- Changed description of "Allowed to Modify Review" to better reflect true behavior (Case 51954)
- fixed --- When Eclipse plugin refresh job fails with network error, stop all refresh jobs
- fixed --- Order files alphabetically in ClearCase version spec page
- fixed --- Prevent multiple instances of server (multiple ROOT.xml files) from running at the same time
- added --- Button to Eclipse Review Editor to open Review in browser
- added --- Implement defect "Track Externally" button in Eclipse plugin
- added --- User Detail Report now contains a link to get a CSV file containing the User Activity data
- added --- Compare reviewed version with local file in Eclipse client
- added --- 'ccollab admin review defect mark-not-external'
- added --- Option to ignore integration history when caculating previous versions in perforce (Case 51845, 45704)
- added --- Always show line numbers by default in Eclipse plugin line-based Compare Editor
- added --- Print To Review support for 300 DPI color (case 52050)
- added --- Check for concurrent DB access
- added --- Change autofill UI in clearcase addversions wizard
- added --- Instructions in manual on how to create database and user in mysql using command line
- added --- Better error handling for server connection errors in Eclipse plugin
- added --- Submit comments / create defects with in Eclipse plugin

6.0.6006 – July 9, 2010

- added --- Command-line commands address existing Conversations by first Comment ID
- added --- Command-line commands 'ccollab admin review conversation mark-read' and 'ccollab admin review conversation accept'
- fixed --- make template editable from eclipse review editor
- fixed --- Defect markers on wrong lines in Eclipse Client
- fixed --- parse diffs files have a Unicode byte order mark (Case 52660)
- fixed --- Enforce administrator dump restriction at dump time, not just display time.
- fixed --- New branched TFS files missing from shelveset review (case 48530)
- fixed --- Better detection of content type in Eclipse compare editor
- fixed --- Better file type icons in Eclipse client Review Editor
- fixed --- Fewer database queries to load diffs on cache miss (Case 52392)

6.0.6005 – June 29, 2010

- fixed --- Typing in Eclipse Plug-in chat and defect text boxes is slow
- fixed --- Eclipse Plug-in Review Editor^[477] icon inconsistent
- fixed --- File URL's break Review overview (Case 51666)
- fixed --- GUI Client missing larger logo sizes
- fixed --- Diff Viewer Prev/Next buttons do not work (Case 52157)
- fixed --- If redacted comment^[389] is most recent comment you cannot make the same comment (Case 52224)
- fixed --- Hidden markers^[374] shown again when zoom^[374] changes
- fixed --- Missing page notification fails to clear after zoom^[374]
- fixed --- Chat column^[385] too narrow in IE8 (Case 52280)
- fixed --- Strange text in confirmation message box when deleting Defect (Case 51460)
- fixed --- User detail report missing one Group (Case 52110)
- fixed --- Javascript error loading Groups admin screen

- fixed --- Participant names are listed in phases where no custom fields are visible (Case 52042)
- fixed --- Eclipse Plug-in Review Editor^[477] shows extraneous "treenode" icon on files
- fixed --- Eclipse Plug-in initialize custom fields^[235] with default values
- fixed --- Wrong default value for selection custom field
- fixed --- Print to Review installer should update system path variable (Case 52390)
- fixed --- Eclipse Plug-in remove "edit" state for Defects
- fixed --- Unable to parse remote origin url from config file (Case 52589)
- added --- Documentation for [Git integration](#)^[566] in the GUI Client
- added --- Documentation for [redact comment](#)^[389] feature
- added --- Command-Line Client command "ccollab admin review set-participants"
- added --- Documentation for [Mercurial](#)^[645] integration
- added --- Drag and drop [participants](#)^[477] to change roles in the Eclipse Plug-in [Review Editor](#)^[477]
- added --- Right-click to edit [participants](#)^[477] in the Eclipse Plug-in [Review Editor](#)^[477]
- added --- Display [participant custom fields](#)^[236] in Review detail report
- added --- Eclipse Plug-in UI to add participants
- added --- Eclipse Plug-in Review Editor^[477] can drag from users list to participant list to add participants
- added --- Drop-down menus to select which version to diff in Eclipse Plug-in [Compare Editor](#)^[482]
- added --- Print to Review documentation with troubleshooting info on Windows 7 and Vista (Case 52398)
- added --- UI field assist for custom field^[235] errors in Eclipse Plug-in
- added --- Database [views](#)^[812] for [participant custom fields](#)^[236] (Case 52324)
- added - Eclipse Plug-in Conversations view^[480] can be filtered to show only defects or comments, removed "Defects" and "Comments" views
- added --- Eclipse Plug-in allow multiple instances of [Conversations view](#)^[480]

- added --- File status (added/modified/deleted) icon decorations in Eclipse Plug-in Review Editor^[479]
- added --- Show Eclipse icon for file type in Eclipse Plug-in Review Editor^[479]

Fixes from [5.0 build 5033](#)^[991]:

- fixed --- [P4 integration](#)^[678] ignores unmodified 'move/add' files when configured to 'revertUnchanged' (Case 52319)
- fixed --- Command-Line Client "collab addchanges" link in Subversion command line documentation (Case 52413)
- added --- Support adding MKS change packages from other authors (Case 52317)
- added --- Performance improvements for custom field queries
- added --- Option to specify how frequently server checks for stalled reviews (performance) (Case 52392)

Fixes from [5.0 build 5032](#)^[991]:

- fixed --- [TFS](#)^[653] Date parsing error in New Zealand (Case 51476)
- fixed --- Improve performance - remove some wasteful queries

Fixes from [5.0 build 5031](#)^[991]:

- fixed --- Not finding CMVC track and find binaries on Solaris (Case 51930)
- fixed --- Error adding [TFS](#)^[653] Shelveset to Review (Case 51386)
- fixed --- Performance issues with [SQL Server](#)^[63] activity queries (Case 52086)
- fixed --- Not all defect activity pulls [defect activity trigger](#)^[197] (Case 51898)
- fixed --- Dynamic reports now properly display [MSSQL](#)^[63]/[HSQL](#)^[99] dates (Case 49695)
- fixed --- do not include [Group User members](#)^[218] in configuration-only dump
- added --- More debug logging for "[add diffs](#)^[449]" commands

6.0.6001 (beta) – June 2, 2010

* FIRST RELEASE OF v6.0 BETA! *

Major new features include:

- Support for reviewing Microsoft Office documents
- An Add-In for Visual Studio - add files to a review from the Solution Explorer
- Significant enhancements to the integrations with [ClearCase](#)^[583], Rational Team Concert, [Git](#)^[563], and [Mercurial](#)^[645]
- Ability to [redact comments](#)^[389]

11.2.8 Version 5

5.0.5041 – February 18, 2011

- fixed --- Update Vault 5.0 references to 5.1 (Case 56205)
- fixed --- [TFS](#)^[653] deletes showing up as initial (Case 55981)
- fixed --- NullPointerException adding pending changelist^[488] with Eclipse plugin (Cases 55998, 56080)
- fixed --- Backport [TFS](#)^[653] Russian date fix to 5.0 (case 55797)

5.0.5040 – January 11, 2011

- fixed --- Update Vault 5.0 references to 5.1 (Case 56205)
- fixed --- [TFS](#)^[653] deletes showing up as initial (Case 55981)
- fixed --- NullPointerException adding pending changelist^[488] with Eclipse plugin (Cases 55998, 56080)
- fixed --- Backport [TFS](#)^[653] Russian date fix to 5.0 (case 55797)
- fixed --- Prevent duplicate Group members (Case 55623)
- fixed --- Reviewer can incorrectly finish until file activity (Case 55456)
- fixed --- Translate ClearCase LATEST to actual version
- fixed --- Support deleted TFS files

- fixed --- Error uploading reverted CVS file in Eclipse plugin (Case 54587)
- fixed --- Version change without content change shows 'Uploaded File' instead of change metrics (case 55130)
- fixed --- Wrong version uploaded for ClearCase activities with unordered changes (case 54648)
- fixed --- Improve 'Invalid ClearCase version' message (case 54975)
- fixed --- Wrong base version for Vault rolled back versions (case 53902)
- fixed --- Support Vault 5.0.4/Fortress 2.0.4 (Case 54773)
- fixed --- Prevent MKS host name truncation (cases 53470,54780)
- fixed --- Updated manual to document all views. Corrected view name to: defects_by_path (Case 54437)
- fixed --- "sort next file/previous file the same as the review overview screen, collating case" (Case 54132)
- fixed --- Prefs page fails to render tabs in IE7

5.0.5039 – September 17, 2010

- fixed --- defect triggers do not fill in substitution for \${actor.*} (case 53618)
- fixed --- '--diffbranch' option should not return CHECKEDOUT versions (Case 53680)

5.0.5037 – August 25, 2010

- added --- Configurable AccuRev history algorithm
- added --- VHDL syntax highlight (Case 53648)
- fixed --- Fix type coercion error in oracle compatibility (Case 52573)
- fixed --- Repair corrupted MetadataValueInteger fieldIds (case 52573)
- fixed --- Do not load inactive custom fields (Case 52573)
- fixed --- Chat Pane in FireFox 3.x too wide in Linux (Case 53580)
- fixed --- Update jPDFImages - PDF rendering never completes - 100% CPU load (Case 53486)
- fixed --- "Download Diff" generates invalid diffs. (Case 53479)

5.0.5036 – August 10, 2010

- fixed --- removed broken "Revert" buttons from the Group Admin page
- added --- Allow user to provide Subversion a HTTPS client certificate password at runtime (Case 53263)
- fixed --- Validate that a changelist can be detached (Case 53375)
- added --- Diagnostic to find and fix reviews that have illegally detached changelists (Case 53375)

5.0.5035 – July 29, 2010

- fixed --- Enforce administrator dump restriction at dump time, not just display time
- fixed --- Error uploading Subversion revision with directory changes in Eclipse Plugin
- fixed --- Performance - case insensitive string indexes in Oracle (Case 52392)
- fixed --- Content archive queries did not scale well
- fixed --- Auto-detect character encoding of user-provided diffs instead of using system default
- fixed --- do not flood output.log with regular log messages
- fixed --- Typos in documentation of "ccollab admin batch" command (Case 52711)
- fixed --- Allow non-ascii characters in username/password field (Case 51434, 52406)
- fixed --- ClearQuest activity review titles should default to headline (Case 49180)
- added --- Option to ignore integration history when calculating previous versions in Performe (Case 51845, 45704)

5.0.5034 – July 9, 2010

- fixed --- Parse diff files that start with Unicode Byte Order Mark(Case 52660)
- fixed --- Reduce number of queries required to load diffs (Case 52392)
- fixed --- New branched TFS files missing from shelveset review (Case 48530)
- added --- [Server plug-in](#)⁶³² for Rational Team Concert, Beta

5.0.5033 — March 23, 2010

Upgrade to ExtJS 3.1. This fixes many UI issues including:

- fixed --- Diff Viewer resize issues in Internet Explorer (Case 52189)
- fixed --- Collaborator defect form entry display issue (Case 52096)
- fixed --- Participants list boxes when creating/editing review are cut off in ie6 (Case 52032)
- fixed --- Missing scrollbars on initial diff view load (Case 38247)
- fixed --- Image diffs in IE 6 do not work (Case 46236)

- added --- Support adding MKS change packages from other authors (case 52317)
- added --- Option to specify how frequently server checks for stalled reviews (performance) (Case 52392)
- fixed --- P4 integration ignores unmodified 'move/add' files when configured to 'revertUnchanged' (Case 52319)
- fixed --- Updated backup/migration docco to cover how to point collab to a new database (Case 52411)
- fixed --- Performance - Improve custom field queries
- fixed --- Must provide value for sandbox (case 49641)
- fixed --- Fix 'Value requires 2 integer parts' exception (case 51225)
- fixed --- Support uploads of change packages from other authors (case 52317)

5.0.5032 — June 14, 2010

- fixed --- do not include group user members in configuration-only dump
- fixed --- Performance - Remove some wasteful queries.
- fixed --- ClassCastException in Oracle data loading code.
- fixed --- TFS Date parsing error in New Zealand (Case 51476)

5.0.5031 — 2010/06/10

- added --- More debug logging for "add diffs" commands (Case 52124)

- fixed --- Wrap long error messages (Case 51915)
- fixed --- Not finding CMVC track and find binaries on Solaris (Case 51930)
- fixed --- Error adding TFS⁶⁵³ shelveset to review (Case 51386)
- fixed --- Performance fixes for SQL Server activity queries (Case 52086)
- fixed --- Not all defect activity runs defect activity trigger (Case 51898)
- fixed --- Dynamic reports now properly display MSSQL/HSQL dates (Case 49695)

5.0.5030 — May 22, 2010

- added --- Support for 'addactivity all' (Case 50444)
- added --- Better documentation for addversions command.
- added --- option to specify local database path in Rational Synergy (Case 51587)
- added --- Forward compatibility; improve error messaging when connecting to a 6.0 server.
- fixed --- Addactivity hangs reading activity (Case 51276)
- fixed --- ClearCase performance improvements (Case 50942)
- fixed --- Incorrect timezone offset for submitted Perforce changes (Case 50679)
- fixed --- Create new User Account subtext (Case 51328)
- fixed --- Handle deleted files in ClearCase activities (Case 51275)
- fixed --- Reports CSV output should not consume a license (Case 51457)
- fixed --- Auto-refresh clears unsubmitted comments in the text area (Case 51369)
- fixed --- Reviews created with addversions include files from other reviews (Case 50682)
- fixed --- Notification emails not being sent. (Case 51204)
- fixed --- Command line client missing edit file list prompt message.
- fixed --- NPE when content unavailable; blank screen loading user home page.

5.0.5029 — April 20, 2010

- fixed --- Add per-file lines metrics to review-xml (Case 51010)

- fixed --- Some PDFs do not show up in reviews (Case 50826)
- fixed --- Performance improvement - fewer queries to load action items.
- fixed --- Performance improvement - fewer queries to perform comment promotion; render review overview
- fixed --- Performance improvement - reduce computation when rendering review overview
- fixed --- Performance improvement - reduce computation required to map from SQL result sets to datamodel objects.

5.0.5028 – April 13, 2010

- added --- Technology Preview of IBM Rational Team Concert support
- fixed --- Limit syntax highlighted file size to prevent CPU spike when processing large files (Case 51015)
- fixed --- 'not a ClearCase object' error on Linux (case 50938)
- fixed --- Synergy passwords in clear text of debugging logs (Case 50925)
- fixed --- Fix NPE in logging (case 50799)

v5.0.5027 – March 26, 2010

- added --- 'ccollab admin review defect delete'
- added --- 'ccollab admin review defect mark-fixed' and 'ccollab admin review defect mark-opened' commands
- added --- "ccollab admin review edit" "--deadline" option to change Review deadline (Case 50739)
- fixed --- Bad data on 'ccollab admin review-xml' in some cases using Sun JRE 6. (Case 50372)
- fixed --- Setting multi-valued fields from 'ccollab admin review defect edit'
- fixed --- Cannot Accept or comment after a file has been deleted (Case 50466)
- fixed --- Manual did not reflect changes to review deadline implementation (Case 47876)
- fixed --- Bad error message when command-line scm autodetect fails
- fixed --- complex histories cause poor performance adding files with Synergy (Case 50594)

- fixed --- error creating new custom field with same name as deleted custom field (Case 50457)
- fixed --- Improved performance of 'ccollab addchangelist' with multiple changelists
- fixed --- strip xml1.0 unfriendly chars from arguments list of xmlrpc calls
- fixed --- addactivity diffintegration option diffs wrong integration stream version (case 49870)
- fixed --- Set default review deadline when creating reviews from command-line (Case 50739)
- fixed --- better debug logging for "ccollab admin wget"
- fixed --- 'ccollab admin wget' fails with servers not at root of host (Case 50101)
- fixed --- NPE in logging when log message is null (Case 50799)

v5.0.5026 – March 3, 2010

- added --- Command-line support for creating Defects and Comments at page coordinates
- added --- Documentation for configurable cache settings. (Case 50104)
- added --- Support [Perforce Eclipse plugin](#)^[497] v2009.2.234487
- added --- Allow setting of a review's 'display changelists as' setting from the commandline (Case 50327)
- fixed --- Toolbar titles misaligned (Cases 48690, 48846, 49976)
- fixed --- Preserve state of Accept and Mark Read buttons after canceled defect edit. (Case 49512)
- fixed --- HTML encoding interacting with auto linking. (Cases 49794, 50010)
- fixed --- StarTeam add-diffs not capturing path info (Case 49875)
- fixed --- Cannot cancel, externalize, or edit Defect on Review overview (Case 47734)
- fixed --- NullPointerException in DocumentPageServlet when engine is not available (Case 50134)
- fixed --- Updated manual with current [MySQL installation instructions](#)^[498] using the supported tools (Case 50002)
- fixed --- Updated docs with information on integrated authentication with [SQL Server](#)^[499] (Case 49853)
- fixed --- NPE when version server path empty (Case 49944)

- fixed --- Race condition between content archiver and review creation (Case 30131)
- fixed --- Invalid cached differences result in no diffs being displayed (Case 30131)
- fixed --- Paths in reports are double encoded
- fixed --- Poor error behavior when "p4 set" and "p4 info" have no output (Case 50331)
- fixed --- Wrong [ClearCase](#)^[583] branch predecessor for zero versions (Case 49102)
- fixed --- [MKS](#)^[666] change packages should always be pending (Case 48754)
- fixed --- Updated manual to clarify overdue deadline status messages

v5.0.5025 – February 10, 2010

- fixed --- Background services not started if database was unavailable at startup
- fixed --- Bad error message when no assigned tasks are found (Case 49423)
- fixed --- Can not add yourself as a participant to an existing review (Case 49419)
- fixed --- Default review title not set for [addactivity](#)^[603] (Case 49180)
- added --- Getting started links on the last page of the [client installer](#)^[426]
- added --- 'ccollab admin wget' command
- fixed --- Real paths for [Rational Synergy](#)^[605]
- fixed -- The "Link" link in dynamic reports now works again. (Case 49199)
- fixed --- [MKS](#)^[666] files incorrectly marked as new (case 48775)
- fixed --- Canonicalize [MKS](#)^[666] host names (case 49466)
- added --- Keyboard shortcuts in the [GUI client](#)^[435]
- fixed --- Verify connection to server when [setting up Subversion](#)^[715] (Case 49773)
- fixed --- Updated [installation documentation](#)^[63] for SQL Server 2008, Java 6, and JDBC drivers (Case 49238)
- fixed --- Users duplicated in drop-downs when using Groups (Case 49594)
- added --- Update browser launcher to support GNOME open, KDE open, and XDG open (Case 49677)

- fixed --- Participant filter name in dynamic reports is once again "participantLogin". (Case 49584)
- added --- 'ccollab commit --dismiss-only' option

Fixes from [4.0 build 864](#)^[1014]:

- fixed --- List report results improperly cached (Case 49572)
- fixed --- LDAP lockout can occur if Collaborator is used infrequently. (Case 49526)
- fixed --- "Too many open files" error in Content-Cache Diagnostic (Case 49687)

v5.0.5024 – January 14, 2010

- added --- External Diff Launcher variable "after.version.localFilePath" to enable launching editor (<http://uservoice.com/a/7wS9r>)
- added --- JMX Interface to Diagnostics
- added --- addversions support for Rational Synergy (Case 48922)
- added --- edit defects on the command line (Case 49142)
- fixed --- filtering a report based on users now works properly with multiple participants in each role
- fixed --- NPE getting content from deleted file using ccollab adddiffs with before and after directories
- fixed --- Visual Studio Addin does not size correctly (Case 48914)
- fixed --- Visual Studio Addin should show wait cursor while busy (case 48914)
- fixed --- option to start Synergy session with -rc (Case 48922)
- fixed --- Perforce local changelists not showing reverted files as reverted (Case 48321)
- fixed --- unrepresentable characters break RPC interface (Case 46761)
- fixed --- Sort action items consistently
- fixed --- VSS diff anomalies (case 47484)
- fixed --- Review too large for refresh algorithm is wrong
- fixed --- use Eclipse proxy settings UI, if available (Case 41725)
- fixed --- broken error message on custom fun facts.

- fixed --- Copy-paste not working in web diff viewer, selection is always cleared(Case 49193)
- fixed --- NPE when completing add changes wizard on review selection screen
- fixed --- email notifications stop being delivered (Case 45913)
- fixed --- NPE in Starteam diff support (Case 49263)
- fixed --- Clearcase '--diffbranch pre' option picks wrong predecessor (Cases 49102, 48802)

v5.0.5023 – December 11, 2009

- added --- Better debug logging for add*diffs commands (Case 48205)
- added --- "ccollab addfiles" option --relative-to (Case 46457)
- added --- StarTeam '--stcmd-exe' option (Case 48622)
- added --- Diagnostics section to the manual (Case 48571)
- added --- High Availability Best Practices section to manual
- added --- Content store cleanup diagnostic
- fixed --- Display external diff launcher errors on MacOS
- fixed --- Custom fields values reset when non-participant adds self to a review (Case 48338)
- fixed --- Support p4 2009.1 move/add and move/delete actions (Case 48312)
- fixed --- Default external diff viewer does not launch on Mac OS (Case 48356)
- fixed --- Review dump not available from searching by review ID
- fixed --- Do not install AJP connector by default. (Case 48372)
- fixed --- Automatic session creation for Rational Synergy (Case 48065)
- fixed --- 'specify p4 command Charset' needs to be a boolean drop down in the web UI (Case 48071)
- fixed --- .smartbear directory too accessible (Case 48001)
- fixed --- Handle Synergy objects not associated with tasks (Case 48623)
- fixed --- Subsequent MKS sessions fail to connect (case 48642)
- fixed --- Action Items refresh should cache login for 20 minutes

- fixed --- Require non-blank label for "Group" (Case 47463)
- fixed --- Require non-blank external URL (Case 47351)
- fixed --- Require non-blank Group title (Case 47487)
- fixed --- Require non-blank Group title (Case 47487)
- fixed --- Ignore unmerged branches in history (Case 48623)
- fixed --- Error in creating Automatic Link removes creation data (Case 47616)
- fixed --- Notifications need not refer to existing reviews for Database Integrity Check to pass (Case 48688, 48727)
- fixed --- Determine perforce client is unknown when 'p4 info' output gives no client root (case 48525)
- fixed --- NullPointerException in shutdown if datamodel could not be initialized.
- fixed --- Security fix for XSS vulnerability (Case 48559)
- fixed --- Install4j not installing non-GUI symlinks(Case 48731)
- fixed --- Added a workaround for SWT/GTK bug (Case 48377)
- fixed --- Unparseable surround date format (case 48762)
- fixed --- Empty files being written to content cache (Case 48834)
- fixed --- Respond better to coming online before the database after reboots

v5.0.5022 – November 12, 2009

- added — Accessibility improvements for diff view and review overview.
- added — Technology Preview of Rational Synergy support
- fixed — Error message on client when error uploading content to server (Case 48135)
- fixed — Log error message in server when content-cache is full (Case 48135)
- fixed — Older Perforce servers do not include "SubmitOptions" in client spec (Case 48100)
- fixed — Fix for MKS keyword expansion (Case 47784, 47251)
- fixed — Workaround for 'tf history' bug in Visual Studio 9.0 (Case 47438)
- fixed — Spaces in custom field names broke variable substitution (Case #48105)

- fixed — Log exceptions closing files in content store
- fixed — Make preferences directory as necessary to save "last" review and defect (Case 48194)
- fixed — Old p4 clients ignore -ztag with the where command (Case 48154)
- fixed — Auto-refresh disabled popup is too obtrusive. (Case 48177)
- fixed — Continue if missing MKS revision encountered in change package
- fixed — Rename "Subversion Server GUID" to "Subversion Repository UUID" in UI and Docs

v5.0.5021 — October 28, 2009

- added — log author prep time while in planning phase (Case 47593)
- fixed — Check for compatible product version before trying to restore from a dump file (Case 47869)
- fixed — Upgrade to JavaMail for defect causing email notifications to stop (Case 45913)
- fixed — Report filters display incomprehensible error messages (Case 47768)
- fixed — server should install license file with the EULA (Case 47946)
- fixed — Handle Perforce SubmitOptions: revertunchanged (Case 47488)
- fixed — Remove "Restore Defaults" button from Server Connection preferences page (Case 47950)
- fixed — Error adding a Subversion revision with Eclipse plugin
- fixed — Typo in the mandatory subscriptions error message (Case 47469)
- fixed — do not specify "-Q utf8" when the customer specifies "p4commandcharset none" (Case 47032)
- fixed — Unrecognized TFS date format for zh_TW locale (case 47813)
- fixed — Spurious P4V addons message at end of the install process on when Perforce is not installed
- fixed — Updated jdpdfimages binaries to fix null pointer when uploading PDF and subsequent PDF rendering problem (case 47879)

v5.0.5020 — October 15, 2009

- added — log author prep time while in planning phase (Case 47593)
- added — Added information about how groups are stored in the database for custom reporting
- added — Support for MKS renames (Case 47037)
- fixed — next/prev file in diff viewer algorithm wrong (Case 47406)
- fixed — review custom field visibility by phase not editable (Case 47283)
- fixed — Diff download format broken when change occurs at end of file.
- fixed — Diff download fails when insertions at end of file. (Case 47748)
- fixed — improve explanation of managing Groups manually vs with sync
- fixed — LDAP access broken when server returns absolute names (Case 47391)
- fixed — Verify Database Schema diagnostic shows bogus errors on Oracle (Case 47732)
- fixed — LicenseDecodingException experienced when system attempts to retrieve stored license (Case 47690)
- fixed — do not let user install server on Linux if port is in use
- fixed — Auto-refresh of review overview screen locks the browser UI thread (Case 47740)
- fixed — External Diff Launcher fails for certain files on Windows (Case 47649)
- fixed — Edit defect causes tab to be inaccessible to screen reader
- fixed — Error deleting symlink in performce (Case 47327)
- fixed — Make Add SCM Configuration resize more nicely (Case 47290)

v5.0.5019 — October 1, 2009

- added — DateTime control in Subversion update changes by date GUI dialog
- added — Database schema diagnostic
- added — Support commit info on changelist current versions
- fixed — Layout of error popup on Eclipse 3.5 and GUI client
- fixed — GUI Client and Tray Notifier will not launch on 64-bit MacOS (Cases 47336, 46337, 47149)

- fixed — Poor behavior in notifications with anonymous defects (Case 47405)
- fixed — Duplicated output on adddiffs (Case 47409)
- fixed — Missing arg in versionCreate: support commit info for current versions in changelists (cases 44540, 45620)
- fixed — Performance fixes. Reduce total database load when displaying reviews
- fixed — sitting on the review overview page can result in consuming a license (case 46356)

v5.0.5018 — September 17, 2009

- added — Tray Notifier on MacOS (Case 38167)
- added — GUI client and Tray Notifier support for Solaris on X86 (Case 46627)
- added — GUI client support for MacOS 64 bit (Case 46337, Case 47149)
- added — Add a general comment when a changelist is removed from a review (Case 46562)
- added — Make cache performance information available in System screen (Case 47315)
- fixed — 'ccollab admin group create' errors with "Group GUID '...' must exist before you can edit it." (Case 47166)
- fixed — 'ccollab admin group' commands error with "Group GUID '...' must exist before you can edit it." (Case 47166)
- fixed — Added documentation for Review Deadline to the Creating a review section and edited the Creating a review section (Case 47184)
- fixed — The link inside of the GIT integration had a typo that was making it appear malformed (Case 47191)
- fixed — Need to fix the AccuRev casing in the standalone GUI (Case 47247)
- fixed — Surround missing from scm config list for CLI
- fixed — Typo on the triggers page in the command for passing a review title (Case 47241)
- fixed — Better explanation of "Active Users" chart (Case 47316)
- fixed — Client does not open browser on MacOS (Case 47051)
- fixed — Improve performance of Fun Fact total review time query.
- fixed — Minimum required Surround client is 2009.1.0

- fixed — Better description of review deadline meaning (case 47239)
- fixed — GUI client does not close properly on MacOS X (Case 46061)
- fixed — Tray Notifier not resizable on Linux (Case 36320)
- fixed — Diff cache misses almost always (Case 47315)

v5.0.5017 — September 1, 2009

- added — Support Perforce eclipse plugin^[497] 2009.1.209672 (Case 47023)
- added — Accessibility improvements to chat [Comment and Defect tabs](#)^[385]
- added — Allow expansion of [changelist title](#)^[327] to the full list of included changelists (Case 46928)
- fixed — [Subscription](#)^[307] authors not displayed when subscriptions are not editable (Case 46423)
- fixed — [Diff viewer](#)^[357] screen blank for some files - ArrayOutOfBoundsException on server (Cases 46500, 46737)
- fixed — Review report idle times negative on HSQL (Case 46159)
- fixed — Binary files opened from [chat links](#)^[260] do the wrong thing (Case 46808)
- fixed — Remove incorrect references to "side-by-side" from [diff viewer preferences](#)^[353]
- fixed — Truncate length of large changelist comments before uploading
- fixed — Users are not sorted in [participants selection dropdowns](#)^[317] (Case 46594)
- fixed — Review Detail Report includes redundant comments (Case 46183)
- fixed — "null" showing up in version selection (Case 46876)
- fixed — SVN executable "svn" is reset when the [GUI client](#)^[435] restarts
- fixed — Subversion Eclipse^[500] plugin support recognize status "Incomplete" (Case 46930)
- fixed — Prevent Tomcat from filling up the output.log file
- fixed — More consistent layout for binary files (non-PDF)
- fixed — Modified Vault files not found (Case 46754)
- fixed — Modified [MKS](#)^[666] files in pending change packages compare to wrong predecessor (Case 46511)

- fixed — Miscellaneous Surround fixes (Cases 46348, 45669)
- fixed — Some modified Vault files not being found (Case 46754)

v5.0.5016 — August 13, 2009

- fixed — Handle errors in [Subversion](#)^[710] working copy (Cases 46307, 35884)

v5.0.5015 — August 11, 2009

- added — Links for further information in the [installer](#)^[68]
- added — Vault 5.0 and Fortress 2.0 support (Case 46586)
- added — Support configurable [image file types](#)^[187] (Case 46632)
- added — Perforce [changelist renumbering](#)^[679] script to manual (Case 41154)
- fixed — Use [configured label for Group](#)^[173] in participants error message
- fixed — Scrub invalid dropdown values during upgrade
- fixed — [Subversion integration](#)^[710] should be case-insensitive on Windows (Case 46561)
- fixed — [Installer](#)^[68] crash due to malformed xml (Case 35977)
- fixed — do not count sysadmin on license screen with [LDAP](#)^[106] (Case 45222)
- fixed — Ignore [CVS](#)^[553] 'no longer in the repository' errors (case 46519)
- fixed — Handle empty [Subversion](#)^[710] comments (Case 46603)
- fixed — Deleted [PDF](#)^[372] in changelist causing upload failure (Case 46574)
- fixed — Upgrade fails if no diffs cached in database
- fixed — Better [XPath](#)^[826] output, including line feed between multiple results (Case 43498)
- fixed — Incorrect timezone application in customizable reports on MySQL (Case 45687)
- fixed — Reviews by Changelist and Unreviewed Changes reports broken if filtered on Changelist ID (Case 46534)
- fixed — Use configured SCM options in "Add Diffs" button on GUI Client (Case 45436)
- fixed — Log more info when sending email fails (Case 46728)

- fixed — Surround fixes for added files, parsing 'sscm ls' output, and embedded lines in comments (Cases 46480, 45669)
- fixed — Inactive users whose logins are duplicates of active users could block database upgrade (Case 46745)

v5.0.5014 — July 31, 2009

- added — Documentation of "--scm none" option (Case 46456)
- added — Button to restore default notification templates and add missing ones
- added — Button to restore defaults on External Diff preference page (Case 46512)
- fixed — Comments on line 0 cause exceptions (Case 46332, 46379)
- fixed — Expose last activity time in review-xml. This is the review completion time for complete reviews (Case 46467)
- fixed — Participants warning appears when group security is not enabled (Case 46157)
- fixed — Old clients added System Administrator to review when adding a changelist whose author did not match a Collaborator user (Case 46187) (server-side fix)
- fixed — Surround SCM committed changelists support and misc fixes (Cases 45669, 45823, 45771)
- fixed — Better logging for login errors (Case 46463)
- fixed — More lenient check for loopback address in p4port
- fixed — do not autodetect SCM system when printing command-line help usage (Case 46353)
- fixed — do not create new review for add*diffs commands if no modified files found in diff
- fixed — Cleaner error message for add*diffs command when no diffs found (Case 46135)
- fixed — Display errors returned from 'ccollab addp4diffs' command (Case 46096)
- fixed — Handle odd userId cases correctly (Case 46523)

v5.0.5013 — July 28, 2009

- added — "Test Connection" button for server-side version control server entry
- added — Create server-side version control server entries automatically from client uploads
- fixed — Error logging status of Subversion connection on server (Case 46249)

- fixed — update-changelist scm trigger finds changelists from a different server

v5.0.5012 — July 24, 2009

- added — Ability to disable "attach changelist" in browser per server-side version control configuration
- added — Support Objective-C syntax highlighting in .m/.mm files (case 46057)
- fixed — Multiple concurrent database upgrade attempts when the Upgrade button is pressed repeatedly
- fixed — potential temp value collision in upgrade could cause all of one dropdown value to be assigned to an other.
- fixed — Error with "ccollab adddiffs new <before dir> <after dir>" with deleted directory (Case 46239)
- fixed — do not query for database version all the time. (Case 46241)
- fixed — "adddiffs" does not roll up with "addchanges" when no SCM system (Case 45964)
- fixed — If using 'p4-protects-script' do not require connection to Perforce Server
- fixed — Support MKS variants in change package files (case 46212)
- fixed — handle anonymous commits in Subversion (Case 46393)
- fixed — User prefs review subscription form field title "Review Creator" is misleading (Case 46310)

v5.0.5011 — July 20, 2009

- added — supply P4PORT to 'p4 -s protects' script
- fixed — Upgrades of SSL Connectors
- fixed — require P4PORT to be an external server name, not "localhost"
- fixed — Improve behavior of activity update queries.
- fixed — Change diff caching mechanism to take load off database.
- fixed — put on schema blinders for oracle indices, triggers, and sequences

v5.0.5010 — July 16, 2009

- added — Option to update ClearCase snapshot views (Case 45296)
- added — Button to accept self-signed Subversion server certificates (Case 46133)
- added — Server-side version control templates
- fixed — working of diff download tooltip on Review overview screen (Case 45985)
- fixed — tray notifier tooltip does not refresh (Case 46038)
- fixed — improve line wrapping algorithm (Case 45959)
- fixed — search for filenames fails to return results. (Case 46067)
- fixed — Command line client throws exception if user cancels (Ctrl-C) when prompted for password.
- fixed — scm triggers use server-side version control mapping to find correct server (Case 45841)
- fixed — scm triggers print extra output (Case 45963)
- fixed — groups created in Collaborator enforced after switching to CodeReviewer license (Case 46040)
- fixed — recent Participants link does not work for users not in the group (Case 46055)
- fixed — Improve file headings; especially for diffs.
- fixed — Updatechangelist trigger should not touch changelists descriptions that do not involve the trigger
- fixed — Update perforcetrigger usage message to indicate that it is deprecated.
- fixed — do not munge whitespace in p4 specfiles when we modify them (Case 46088)
- fixed — Error in Eclipse plugin "fix configuration" action item (Case 46164)
- fixed — SQL Server date format not specified. (Case 44329)
- fixed — new trigger algorithm backwards-compatible with old clients when there is only one Perforce server
- fixed — Improve performance of some queries under Oracle

v5.0.5009 — July 7, 2009

- updated — jPDFImages library to version 2.13.

- updated — Tomcat to version 6.0.20
- added — Perforce 'Server Address' for version control identification/matching.
- fixed — support for http.nonProxyHost (proxy exceptions) (Case 45855)
- fixed — Check that database supports views before attempting to create views. (Case 45616)
- fixed — Interpretation of some svn output is broken (Case 45775)
- fixed — Wrong Vault predecessor for modified files in VSS mode (Case 45839)
- fixed — Enforce CodeReviewer database restrictions (Case 41184)
- fixed — Enforce CodeReviewer LDAP restrictions
- fixed — Cannot open .zip file from file download (Case 45903)
- fixed — Remove administration screen for configuring Legacy GUI Client versions; it is not supported in 5.0.
- fixed — Support Perforce multi-file diff format in ccollab adddiffs (Case 45420)
- fixed — Suppress 'p4 info': Client unknown warning (Case 45963)
- fixed — Idle users being counted as logged in (Case 46015)
- fixed — Support Perforce client specs with exclusionary mapping rules (Case 45986)

v5.0.5008 — June 29, 2009

- added — Reminder for administrators to migrate from the trial database
- added — Link defects in the defect reports
- added — Syntax highlighting for Ruby
- added — Configure P4V/P4Win integrations in the installer
- fixed — Support for SVN checkouts at drive roots
- fixed — Cannot find Accurev workspace (Case 45645)
- fixed — Periodically checkpoint HSQLDB
- fixed — "Update From Smart Bear" sends the user-provided company key
- fixed — NPE in comment promotion

- fixed — External diff does not work with too many files (Case 45667)
- fixed — Improve UI for removing a disabled user from a review (Case 45755)
- fixed — Error uploading TFS shelvesets with new files (case 45709)
- fixed — Handle MKS change packages in submitted state (case 45631)
- fixed — No scroll bars in chat window for binary files (Case 45519)
- fixed — AccuRev NPE in ccollab addstream (Case 45764)
- fixed — Better error message for Perforce authentication problem (Case 45778)
- fixed — Incorrect activity start dates (Case 45759)
- fixed — Selecting a marker should scroll it into view (Case 45265)
- fixed — Upgrade 500 to 501 bug on MySQL
- fixed — Upgrade speed fix
- fixed — License check causing spurious log messages.
- fixed — Once disabled, role cannot be reenabled (NPE) (Case 45845)
- fixed — NPE in "Moving On" section (Case 45696)

v5.0.5007 — June 15, 2009

* FIRST GA RELEASE OF v5.0! *

- added — Reporting of slow queries in the server log to help diagnose slow operations
- fixed — Slow browser response on some reviews (Case 44872)
- fixed — NPE and divide by zero in client commit (Cases 45480, 45497)
- fixed — NPE in comment promotion
- fixed — Updated HSQLDB to 1.8.0.10 to fix possible data corruption issues with embedded database.
- fixed — Changelists from different SCMs must be kept separate everywhere. (Case 45234)

- fixed — Files not showing up in reviews; TFS versions from early beta clients causing issues (Case 45504)
- fixed — Changelist rollup should be based on SCM config, where available (Case 45338)
- fixed — group not assigned when review created by client (Case 45511)
- fixed — j_security_check login bug (Case 42864, Case 45102, probably more)
- fixed — Long version names (from ClearCase) cause display issues in diff viewer (Case 45261)
- fixed — Misleading error message on ccollab admin trigger create-review (Case 45540)
- fixed — Verify for P4 2009.1: "p4 info" now reports the server address (Case 45635)
- fixed — create-review trigger does not set "last" review variable (Case 45437)
- fixed — Database dump fails when review contains URL versions (Case 45575)
- fixed — NPE when trying to archive files.

v5.0.5005 (beta) — June 4, 2009

- (fixes from release [4.0.860](#)⁽¹⁰¹⁴⁾)
- (fixes from release [4.0.859](#)⁽¹⁰¹⁴⁾)
- updated — Manual updated with various new features.
- added — Filters for users on the user administration screens
- added — New variable substitutions: defect.isexternal, defect.externalname, review.group.title, and review.group.guid.
- added — Side by side document review/compare menu working (Case 44443)
- added — MKS change package and addversions support (Cases 43812, 44416, 44540)
- added — User preference for tab width (Case 40604)
- fixed — Company contact information not correct in license files.
- fixed — Improved page load times for review overview page.
- fixed — Improved performance of database query builder (Case 45029)
- fixed — NPE when changing general settings in reviewer.

- fixed — Review list report displays bogus warning when number of rows exactly equals capped number (Case 44525)
- fixed — URL's with embedded credentials not properly linked (Case 44958)
- fixed — create-review trigger argument --review-id-regex <value> should be optional (Case 45091)
- fixed — Compare list/diff viewer headings need more accurate information when using diffs (Case 44672)
- fixed — Next file order does not match compressed tree or tree views (Case 45098)
- fixed — Misleading label for new chat area when reviewing documents or images.
- fixed — Cannot jump back to current conversation when on a different page of a document (Case 44229)
- fixed — NPE in GUI client (Case 44914)
- fixed — Line numbers lost for comments on unchanged deleted files (Case 44819)
- fixed — NPE when reverting an unsupported file (Case 45092)
- fixed — Separate multiple changelist description text for readability (Case 44677)
- fixed — Error messages not cleared in attach changelist/url/file dialogs (Case 44726)
- fixed — Firefox sometimes incorrectly guesses RSS encoding (Case 45129)
- fixed — addgitdiffs command now gets more information from git diffs
- fixed — Unable to remove last item from a multiselect custom field (Case 44379)
- fixed — Added command to support Perforce changelist renumbering (Case 44978)
- fixed — Restrict access to fix defect global option does not allow defect creator to fix (Case 45202)
- fixed — Chat box opens for wrong line of code (Case 45149)
- fixed — Support ClearCase 7.1 and int'l date formats (Cases 44914, 45122)
- fixed — Added user state tooltip in the participants section of review overview (Case 43258)
- fixed — addchangelist with Perforce not uploading correct base content (Case 44577)
- fixed — Add configuration for server logging.
- fixed — Workaround for pool users not available.

- fixed — Home page tab counters not updated when content changes (Case 45238)
- fixed — Changed default poke notification text (Case 45258)
- fixed — Corrected timezone for date displays in tables such as the User/Admin screen
- fixed — String replacements fail with \$ (Case 45353)
- fixed — Support multi-line environment variables (Case 43002)
- fixed — User subscription should not (appear to) be pre-populated with the first entry (Case 45317)
- fixed — NPE in content cache diagnostic (Case 45376)
- fixed — multi-select two panel filter does not display correctly on IE (Case 44352)
- fixed — respect notification limit in RSS on embedded database (Case 45129)
- fixed — Text from previous review can appear on new review screen (Case 45324)
- fixed — AccuRev getting incorrect previous version (Case 45257)
- removed — Old-style defect reports -- use new defect reports instead. (Case 45215)

v5.0.5004 (beta) — May 14, 2009

- added — Support addversions for Perforce SCM
- (fixes from release [4.0.858](#)⁽¹⁰¹⁴⁾)
- fixed — Cannot save General Settings in 5.0 (Case 44759)
- fixed — Update documentation for HTTPS configuration
- fixed — duplicate "Adding file" messages with "ccollab addchanges"
- fixed — Remove extraneous "Checking if file exists" messages printed to console with "ccollab"
- fixed — Defects can be added more than once (Case 42403)
- fixed — TFS autodetect causes error when TFS is installed and a file is unmanaged
- fixed — Upgrades fail against SQL Server 2000 (Case 44527, 44730)
- fixed — Next unread comment and next defect buttons do not always work (Cases 41695, 44339)

- fixed — FileMetrics for documents should include page count, but not line counts.
- fixed — Document extension matching (.pdf) is case sensitive (Case 44732)
- fixed — Document review should be unavailable in CodeReviewer
- fixed — Turkish locale issue with capital i (Case 44763)
- fixed — Large changed regions in over under have strange scrolling behavior on line click (Case 46432)
- fixed — Can create defect without supplying required custom fields (Case 40500)
- fixed — Status in review materials is wrong for added files (Case 44839)
- fixed — Command line SCM tokens were case sensitive (Case 44618)
- fixed — Bad VSS login argument on ss.exe command line (Case 44745)
- fixed — Line number validation fails in binary file and URL review (Case 44441)
- fixed — Support for non-ascii filenames in Subversion (Case 43430)
- fixed — Java syntax highlighting rules do not include byte and short
- fixed — Change MIME type of external diffs to be vendor specific (application/vnd.smartbear.cc-diff)
- fixed — URL and document review pane include unnecessary line difference pane (Case 44348)
- fixed — Post-commit review show rework when there was no rework
- fixed — Update documentation on trigger command line syntax (Case 43226)
- fixed — Email addresses not being properly converted to links
- fixed — Bogus error messages in admin screens when inputs are unsaved (Case 40999)
- fixed — Surround password showing up in cleartext (Case 43226, 44954)
- fixed — Custom report filters for meta-data drop-downs need to show disabled items (Case 44504)
- fixed — Diff viewer keyboard shortcuts dialog fails in IE (Case 44338)
- fixed — ArrayIndexOutOfBoundsException when creating svn client config (Case 44961)

v5.0.5003 (beta) — April 20, 2009

- added — refactor review-xml to handle line number/location (Case 44613)
- (fixes from release [4.0.857](#)^[1014])
- fixed — Make the timezone drop-down items findable and readable.
- fixed — reverting on group edit page displays "updated" message (Case 44353)
- fixed — Transparency slider and image toggle not disabled when only one image and preference for newer content on right (Case 44475)
- fixed — Post-commit reviews show files as reworked, even when they are not. (Case 44493)
- fixed — Stack overflow when uploading large files. (Case 44497)
- fixed — Local file status is displayed incorrectly with Subversion (Case 44448)
- fixed — Server fails to shut down running on Windows with Java 5 (Case 44633)
- fixed — Tutorial mode preference is ignored in some places (Case 43229)
- fixed — Improve memory footprint and performance of PDF rendering (Case 44519)
- fixed — Uploading URL message is hidden because the dialog is not tall enough. (Case 44661)
- fixed — Fix addversions command
- fixed — Reordering of custom fields can fail (Case 44692)
- fixed — review-xml includes duplicate conversations (Case 44702)
- fixed — Stack overflow in Eclipse plugin with svn:externals (Case 42824)
- removed — Attach URL feature not supported in CodeReviewer (Case 44555)
- removed — Perforce ACL feature not supported in CodeReviewer (Case 44542)
- removed — Groups feature not supported in CodeReviewer. (Case 44553)
- removed — System wide message feature not supported in CodeReviewer. (Case 44557)

v5.0.5002 (beta) — April 6, 2009

* FIRST RELEASE OF v5.0 BETA! *

11.2.9 Version 4

v4.0.864 – February 4, 2010

- fixed --- List report results improperly cached (Case 49572)
- fixed --- LDAP lockout can occur if Collaborator is used infrequently. (Case 49526)
- fixed --- "Too many open files" error in Content-Cache Diagnostic (Case 49687)

v4.0.863 – September 1, 2009

- added — Support Perforce Eclipse plugin^[497] 2009.1.209672 (cmdline wrapper only)
- fixed — Subversion Eclipse plugin^[500] support recognize status "Incomplete" (Case 46930)
- fixed — Some modified Vault files not being found (Case 46754)

v4.0.862 – August 19, 2009

- added — Support MKS variants in change package files (case 46212)
- added — SQL Server JDBC 2.0 driver documentation
- fixed — Update documentation for new name of Vault 4.1.x client .jar download
- fixed — Handle empty SVN comments
- fixed — Multiple button upgrade bug wherein multiple users click the "Upgrade Database" button and
- multiple upgrades are attempted simultaneously
- fixed — Error in Eclipse plugin "fix configuration" action item (case 46164)
- fixed — .vmoptions file extension

v4.0.861 – July 8, 2009

- fixed — Handle MKS change packages in submitted state (case 45631)
- fixed — p4 -Q does not work before *client* version 2005.2
- fixed — Support multi-line environment variables (Case 43002)
- fixed — Crash in ccollab addchangelist new (Case 45684)

- fixed — Support for svn checkouts at drive roots (Case 45707, Case 45614, Case 45717)
- fixed — Error uploading TFS shelvesets with new files (case 45709)
- fixed — Better error message for Perforce authentication problem (Case 45778)
- fixed — Wrong Vault predecessor for modified files in VSS mode (Case 45839)
- fixed — SVN output interpretation fix (Case 45775)

v4.0.860 — June 3, 2009

- fixed — NPE in ClearCase^[583] hashcode (Case 44189)
- fixed — Error parsing Team Foundation^[653] fr-CA date format (Case 45373)
- fixed — TFS^[653] usernames with leading backslash (Case 45373)

v4.0.859 — June 1, 2009

- added — Better support for higher Perforce^[678] security levels (Case 44899)
- added — Support ClearCase^[583] 7.1 dates (Case 44914)
- added — Support for wildcards in ccollab addfiles (Case 45201)
- fixed — Remove benign log warnings about not able to contact license server (Case 45003)
- fixed — Multiple Vault configurations not working (Case 44642)
- fixed — Custom field views^[812] skipped deleted items (Case 44504)
- fixed — Multiple Authors allowed even when Maximum # of Authors^[259] is 1 (Case 45107)
- fixed — Clicking 'next' does not do anything for Submitted Perforce Changelists^[499] on Eclipse 3.4
- fixed — Modified files not found if username case differs from Vault (Case 44642)
- fixed — Handle Perforce plugin^[497] authentication when password not saved (Case 44899)

v4.0.858 — May 6, 2009

- added — Support for subversion 1.6
- added — UI to generate new Node ID (Case 44480)

- fixed — In some cases, reordering of custom fields can fail (Case 44692)
- fixed — Stack overflow in eclipse plugin with svn:externals (Case 42824)
- fixed — TFS autodetect causes error when TFS is installed and a file is completely unmanaged
- fixed — Locale sensitive bug in embedded database initialization (Case 44763)
- fixed — Bad VSS login argument on ss.exe command line (Case 44745)
- fixed — Custom report filters for meta-data drop-downs need to show disabled items (Case 44504)
- fixed — Exception when using subversion at a drive root (Case 44961)

v4.0.857 — April 15, 2009

- added — Support for Perforce eclipse plugin^[497] 2008.2.195317 (Case 43854)
- fixed — Incorrectly reporting "num-defects" as "num-comments"
- fixed — MKS^[666] trunk version limit error (Case 44275)
- fixed — MKS^[666] history limited to 200 versions (Case 44275)
- fixed — MKS^[666] password appears in debug log (Case 44322)
- fixed — Improper error handling when database fails to initialize (Case 44462)
- fixed — Eclipse plugin support for ClearCase^[490] (Case 44561)
- fixed — Only list shelvesets^[653] for configured user
- fixed — Broken manual link (Case 44506)

v4.0.856 — March 30, 2009

- added — Ability to upload diffs from a file by name
- fixed — Update documentation on Tomcat auto-deploy for ROOT.xml changes (Case 43973)
- fixed — Updated 'collab admin batch' help text
- fixed — Fixed lack of support for multi-lined strings in PHP
- fixed — Exported reports should use UTF-8 character set so as to not garble any characters (Case 41853)

- fixed — Cannot parse certain CVS diffs (Case 44090)
- fixed — Fix broken admin custom fields icon
- fixed — Missing files in MKS changelist (Case 43812)
- fixed — NPE on uncontrolled CVS file (Case 43962)
- fixed — ClearCase host name incorrect (Case 44007)
- fixed — Cannot create roles or templates (Cases 44172, 44255)
- fixed — Engine.NotificationCreate() method should be public (Case 44276)

v4.0.855 — March 5, 2009

- added — updates to Examples.java
- fixed — Linux client connection problems to MKS Integrity Server (Documentation update) (Case 42389)
- fixed — Split Role setting 'Can change defects' into 'Can change own defects' and 'Can change other user's defects' (Case 43765)
- fixed — Extra space at end of url causes problems in Eclipse plugin (Case 43798)
- fixed — Downloading files from a review with duplicate file names causes a corrupted ZIP file (Case 43796)
- fixed — SourceGear Fortress support in Vault (Cases 42962, 43783)
- fixed — NPE in AccuRev due to "file does not exist" (Case 43841)
- fixed — Long changelist description with Unicode characters and Oracle back-end fails to upload (Case 43535)
- fixed — Run each task in a separate thread (Case 43790)
- fixed — ClearCase 'Operation requires a view' exception with supporting documents in review (Cases 43898, 43920)

v4.0.854 — February 23, 2009

- fixed — Perforce ccollabupdatechangelist trigger slow for many thousand files (Case 43688)
- fixed — Search results can return reviews that user cannot access (Case 43722)

- fixed — Unable to parse file extension in ClearCase extended paths, prevents syntax highlighting (Case 43746)

v4.0.853 — February 11, 2009

- fixed — Encode server logs in UTF-8
- fixed — File permission error writing MKS log file under Linux (Case 43241)
- fixed — Javascript bug in classic diff view
- fixed — Bug id markup and HTML encoding conflict (Case 43479)
- fixed — Problem parsing incomplete CVS diffs (Case 42803)
- fixed — Support unmanaged files in MKS directories (Case 43333)
- fixed — Support unmanaged files in TFS directories (Case 43375)
- fixed — Improve chat performance with large numbers of conversations
- fixed — Exception on renamed TFS files when uploading rework (Case 43509)
- fixed — Cannot access view column names in Oracle (Case 43514)

v4.0.852 — January 16, 2009

- fixed — Encode server logs in UTF-8.
- fixed — Do not create duplicate users that vary only base case (effects Oracle and embedded database users) (Case 42741, 42420)
- fixed — Do not add authors to a review if their user account is inactive (Case 43056)
- fixed — If Subversion username is specified, always specify a password (Case 43180)
- fixed — If an XML file includes a charset marker for an unsupported character set, try to recover using autodetection (Case 43182)
- fixed — Add more context to CVS diffs (Case 42803)
- fixed — Oracle limited to 127 switches in a CASE statement
- fixed — Update Vault documentation
- fixed — Handle no-longer-scheduled-to-be-added and -deleted directories in Subversion (Case 43204)

- fixed — Perforce '-Q' option only supported after 2005.2.
- fixed — New file in ClearCase activities appear as modified (Cases 39166, 43227)

v4.0.851 — December 16, 2008

- fixed — Login should accept 64 characters to match the username database field. (Case 42836)

v4.0.850 — December 12, 2008

- fixed — Perforce changelists with high Unicode characters in filenames or changelist descriptions get text corruption. (Case 41819)
- fixed — Add p4charset global option for interacting with Unicode Perforce servers.
- fixed — Build with Vault 4.1.4 API (Case 42625)
- fixed — Launch browser in daemon thread (Case 42826)

v4.0.849 — December 3, 2008

- fixed — Peak usage by day still broken (Case 42748)
- fixed — Support TFS versions with deletion ids (Case 42331)
- fixed — ScmRevertedLocalCheckout cast error (Case 42450)
- fixed — StarTeam uploads file with multiple files in different subdirectories (Case 42523)
- fixed — Argument replacement bug (Case 42525)
- fixed — Multiple-file external diff on IE 6; cache headers cause file not found (Case 42601)
- fixed — Error when loading transaction from AccuRev without workspace (Case 42604)
- fixed — Unified diffs from Mercurial break diff parser (Case 42500)
- fixed — Allow changing case of login name (Case 42675)
- fixed — P4Win integration pause on error (Case 42677)
- fixed — No way to resolve text when review content is decoded in wrong character set (Case 41819, 42536, 42743)
- fixed — Support Perforce sandboxes on UNC paths (Case 42726)

- fixed — Phone numbers not displayed in tooltips (Case 42707)

v4.0.847 — November 13, 2008

- added — Associate .inl files with C++ syntax highlighting (Case 42188)
- added — Documentation of Active Directory configuration with security groups.
- fixed — Show/hide previously uploaded changelists toggle does not remember state (Case 41246)
- fixed — Better handling of corrupted passwords in config files (Case 42283)
- fixed — Make client commit action get all most recent versions instead of active changelists.
- fixed — Do not display SCM passwords in debug log
- fixed — Duplicate user accounts with leading/trailing spaces (Case 42420)
- fixed — MKS IllegalArgumentException (Case 42252)
- fixed — Add changelist id to review-xml (Case 42520)

v4.0.846 — October 28, 2008

- added — Support for Visual SourceSafe diffs (Case 41339)
- fixed — Database connections dying "randomly" causing intermittent web site failure and stopping the activity-update thread
- fixed — ClearCase server paths are canonicalized
- fixed — Wrong ClearCase predecessor after version list edit (Case 41561)

v4.0.845 — October 13, 2008

- fixed — restrict ccollab admin review-xml according to access rules (Case 42080)
- fixed — consistent behavior for ignored and/or unmanaged files in addchanges and addfiles
- fixed — Make RPM installer cleanup of old files optional (Case 41786)
- fixed — Addfiles fails on uncontrolled files in CVS directory (Case 41590)
- fixed — Disabled users should not receive notifications (Case 41607)
- fixed — Use correct system admin login name in "license exceeded" error message

- fixed — "Total Person Time" not the same on review summary and review detail (Case 41118)
- fixed — Open home pages will not count towards licensing (Case 41804)
- fixed — Count chat refreshes against licensing only if the user is active.
- fixed — Prepend External Diff path disambiguation instead of appending so file extension is not changed.
- fixed — Config-only dump skipped review templates' custom review and defect field associations (Case 41826)
- fixed — Add Office 2007 file extensions to default binary formats.
- fixed — Error running ccollab set collab command with no argument. (Case 42028)
- fixed — Fix NullPointerException adding uncontrolled files (Case 41988)

v4.0.843 — September 23, 2008

- added — Support for Vault proxy settings (Case 40815)
- added — [Scripting](#)⁸²⁵ section to manual
- added — [Mirror Defects to external issue-tracker](#)⁸²⁷ scripting tutorial to manual
- added — Add checklist to new Review scripting tutorial to manual
- added — [Sync Perforce Users](#)⁸³² scripting tutorial to manual
- added — Time to run report to report information display
- added — Jump next/prev should not wrap without confirming. (Cases 41431, 41594)
- added — Upload comment option for Starteam (and other) add*diffs commands (Case 41745)
- added — MKS changes for subsandboxes
- fixed — NPE in getRecentlyUsedServers with Team Foundation 2008 (Case 41618)
- fixed — Single-click flicker when double-clicking tray notifier
- fixed — Text variable typo
- fixed — Missing TFS files when server and local paths differ in case (Case 41468)
- fixed — Gap in usage graphs (Case 41396)

- fixed — Chat on line 1000000 should be disallowed if possible and promoted back into reasonable range. (Case 41399)
- fixed — Oracle "table or view does not exist" bug (Case 41184)
- fixed — Detection of SourceForge ClearCase Eclipse plugin (Case 41646)
- fixed — External Diff launcher error for Perforce Pending Changelists (Case 41515)
- fixed — Compare drop-down needs clarification (Case 41644)
- fixed — Vault takes too long to find modified files (Case 41558)

v4.0.842 — August 29, 2008

- added — ccollab commit prompt for upload comment (Case 41055)
- added — support for GUI Client on Solaris (Case 41144)
- added — allow setting multiple-line custom field values on the command line by getting the field's value from a file. (Case 41176)
- added — 'ccollab admin batch'
- added — Support alternate Team Foundation user names
- added — "Open GUI" menu item to tray notifier (Case 41359)
- added — "Support" email links to GUI Client and Tray Notifier (Case 41343)
- added — "--xpath" and "--xsl" options to 'ccollab admin review-xml'
- fixed — Support alternate Team Foundation user name (Cases 41164, 41196)
- fixed — Fix unified diffs for Lua (Case 41195)
- fixed — role configuration admin screen where drop-down boxes were too wide for the form, causing the page to be extremely wide
- fixed — Clearcase error with Unix paths (Case 41100)
- fixed — make next/prev buttons only stop on differences in current comparison (Case 41001)
- fixed — ability to set custom field drop-down items from command-line (Case 39720)
- fixed — ccollabgui client not installed properly by Linux RPM (Case 41115)
- fixed — multi-file external diff (Case 41172)

- fixed — Unicode names get abbreviated incorrectly (Case 41150, 41300)
- fixed — Admin users should be allowed to add changelists to any review (Case 41330)
- fixed — ClearCase eclipse plugin integration cannot find view (Case 41302)
- fixed — User comboboxes fail with internationalized names.(Case 41205)

v4.0.841 — August 20, 2008

- added — Command to set custom field dropdowns from the command line (Case 39720)
- added — Support for GUI client on Solaris (Case 41144)
- fixed — Change contact email address for licensing issues to the appropriate Smart Bear email address. (Case 41037)
- fixed — Role configuration admin screen select boxes too wide.
- fixed — Buttons on Linux displayed even though no SCM selected. (Case 41050)
- fixed — Clear Case error with Unix paths. (Case 41100).
- fixed — Server can fail to start if installation path includes a space on Unix.
- fixed — After changing revisions, Next and Prev buttons stop on differences from prior revision (Case 41001)
- fixed — GUI client not installed correctly by Linux RPM (Case 41115)

v4.0.840 — August 5, 2008

- added — Faster Vault integration
- added — More support for MKS integration
- added — Eclipse v3.4 support for automatic upgrade site (Case 40495)
- added — Auto-detect tf.exe location for TFS 2008 (Case 40852)
- fixed — Enterprise organization field width too small (Case 40263)
- fixed — Inconsistent letter casing when uploading mixed-case paths from Windows (Case 40170)
- fixed — Notification emails encoded in system default character set can be garbled (Case 40693)

- fixed — Added more keywords to TCL syntax coloring (Case 40620)
- fixed — Vault was prompting for each file instead of for all files together (Case 40619)
- fixed — Proper handling for file renaming in TFS integration (Cases 39946, 40018)
- fixed — Erroneous error for "tf properties" (Case 40613)
- fixed — Support for AccuRev integration on OpenJDK (Case 40699)
- fixed — Sundry ClearCase integration issues (Cases 41026, 40198, 40132, 40437, 40619, 39766)
- fixed — ClearCase "unable to access" error when loading from root of Windows dynamic view (Case 41026)
- fixed — Filling output.log with error messages when a session is created and invalidated after response bytes begin (Case 41043)

v4.0.839 — July 14, 2008

- added — Support for Subclipse 1.4 (Case 40457)
- added — ccollab browse --review option accepts "last" and "ask"
- fixed — ccollab adddiffs should put source info in changelist comment (Case 40550)
- fixed — do not error if there are zero review custom fields (Case 40566)
- fixed — Clarify options for ccollab login (Case 40240)
- fixed — do not print Subversion password in GUI client (Case 40649)

v4.0.838 — July 7, 2008

- added — Defect permission configuration setting: do not allow edit/delete defects even if the user was the creator.
- fixed — Upgrade from 2.1.x fail with SQL Server 2005

v4.0.837 — July 2, 2008

- added — Support for Subversion 1.5
- added — Subcommand 'admin review copy-participants'
- fixed — Added indexes for better query performance (Case 40290)

- fixed — User cannot delete a defect they created (Case 40399)

v4.0.836 — June 24, 2008

- added — File commit support for TFS and ClearCase
- fixed — Better error messages in Perforce triggers
- fixed — Report errors in p4 print
- fixed — Incorrect metrics for "loc changed" in detail report
- fixed — Sort user list based on activity (Case 39030)
- fixed — Some metrics not working when using internal database (Case 40006)
- fixed — When large numbers of users in system, new review screen fails to load (Case 40339)
- fixed — Upgrades from early 4.0 versions fail (Case 40332)

v4.0.835 — June 17, 2008

- added — Add Subversion diffs UI in GUI client ^[715]
- added — Add CVS diffs UI in GUI client ^[555]
- added — Add Perforce diffs UI in GUI client ^[683]
- added — Add StarTeam diffs UI in GUI client
- added — Add AccuRev diffs UI in GUI client ^[543]
- added — Role permission ^[256] to allow user to modify, but not delete, defects (Case 39630)
- added — Vault 4.1 support
- added — Syntax highlighting for TCL
- added — JMX monitoring ^[143] of licensing and users
- added — Peak usage chart ^[201] of license usage with accurate data
- added — Browse... button to GUI client ^[435] SCM dialog
- added — Track number of rejected logins due to licensing issues (Cases 39775, 39767)
- added — Integrated support for checking in reviewed materials

- fixed — improved performance of adding ClearCase versions with addversions and addactivity (Case 38732)
- fixed — improved performance of review overview screen (Case 39662)
- fixed — browser integration on OS X (Case 39690)
- fixed — partial fix for external diff config manifest issues (Case 39752)
- fixed — autodetect tf.exe location (Case 39732)
- fixed — attach materials page missing image (Case 39526)
- fixed — Names with apostrophes and hyphens are not properly abbreviated (Case 39750)
- fixed — Optimize/fix adding versions by name (Case 39281)
- fixed — Do not change the case of mixed-case names when abbreviating
- fixed — No vertical scrollbar in classic view in IE7 (Case 39830)
- fixed — Include external diff button for binary files (Case 39754)
- fixed — User list should not be case sensitive (Case 39869)
- fixed — Performance improvement; less frequent access to assignments table (Case 39590)
- fixed — ccollab addchanges fails on Subversion unmodified file after branch (Case 39880)
- fixed — Bad data causes dump to not restore properly (Case 39623)
- fixed — Team Foundation script output appearing in version content (Case 39887)
- fixed — Links in external defects doubly encoded (Case 39921)
- fixed — Make "private" review field available in reports (Case 39900)
- fixed — Improve performance of default review reports
- fixed — Files missing from diff (Case 40002)
- fixed — Diff view does not reload entire page when options change
- fixed — Diff view preference for wrap lines not honored in single version view (Case 39885)
- fixed — Cannot cancel "Track Externally" by choosing "Edit Defect" instead (Case 39073)
- fixed — Review-only dumps corrupted (Cases 39975, 40060)
- fixed — Do not log passwords in cleartext on Windows (Case 40010)

- fixed — Firefox 3 popup calendar sized incorrectly (Case 39723)
- fixed — Delay review creation so users do not create spurious reviews (Case 40031)
- fixed — Tomcat logging should be enabled by default at INFO level.
- fixed — Handle "No Data Given" error parsing spurious TFS properties (Case 39946)
- fixed — Exception in Perforce trigger when changelist description is empty (Case 40085)
- fixed — GUI client should explain that it does not support default Perforce changelist (Case 39948)
- fixed — Filenames with characters outside default character set get garbled (Case 40124)
- fixed — 'ccollab addchanges' on deleted filenames (Case 39483)
- fixed — Error parsing Team Foundation dates with DBCS chars (Case 40145)
- fixed — Performance improvement when loading review phases (Case 39860)

v4.0.834 — May 21, 2008

- added — Custom report field for number of open defects (Case 39234)
- added — Added 'force-new-browser' option to force new browser window
- added — More validation of Browser and Server URL values in GUI Client
- added — Added 'cvs-exe' global option in case CVS executable is not in PATH
- added — Performance improvements to the diff viewer
- added — Added 'accurev-exe' global option in case AccuRev executable is not in PATH
- added — Added 'svn-exe' global option in case Subversion executable is not in PATH
- added — Eclipse plugin Subclipse integration ⁵⁰⁰¹ prompt to automatically switch to SVNKit if necessary
- added — Ability to disable reporting in the Web UI (Case 39550)
- added — Better defect usage description
- fixed — Exception in Database Diagnostic (Case 39323)
- fixed — AccuRev NPE on added file (Case 39195)
- fixed — Prevent users from deleting/canceling reviews (Case 38989)

- fixed — Consistent ordering of changelists by SCM in review materials (Case 39159)
- fixed — Eclipse plugin^[488] should prompt to save modified files before uploading them (Case 34752)
- fixed — Scm systems not being mapped correctly when uploading changelists
- fixed — Subversion moves (add with history) should show the metrics from the diff (Case 39512)
- fixed — Error when changing default value (Case 38091)
- fixed — Deleted files not included in external diff package (Case 39529)
- fixed — Handle error getting modified files in Add to Review wizard (Case 36685)
- fixed — Perforce (P4V) integration^[699] does not report errors (Case 39532)
- fixed — Perforce (P4V) integration^[699] does not work when Workspace not specified (Case 39532)
- fixed — Last line of code removed from review if blank (Case 38957)
- fixed — "AccuRev not in working directory" message comes out as "unexpected error"
- fixed — Update user last activity much less frequently (Case 39590)
- fixed — Deadline status should not display when deadlines disabled

v4.0.833 — April 28, 2008

- added — GUI client remembers last four (4) server URL's^[441] (Case 38271)
- added — Support for locale-specific TFS dates.
- added — Flag to disallow non-author uploads^[177] (Administrator Setting) (Case 38619)
- added — Added "browse" subcommand to clients
- fixed — Subscriptions should not be applied for users whose accounts are disabled (Case 39270)
- fixed — Fix addchangelist help for TFS shelvesets
- fixed — Include summary metrics for all versions in the review detail report. (Case 39228)
- fixed — Add indicator to the "Compare" menu to indicate what is being shown (Case 39219)
- fixed — External diff launcher arguments should be quoted

- fixed — Diff viewer should have a minimum on the number of skipped lines (Case 38119)
- fixed — Add a meaningful error message for unsupported TFS files
- fixed — Fix some bad error messages in client. (Case 39426)
- fixed — Give a better approximation of disk usage in archiving (Case 39333)
- fixed — Diffs not showing with addsvndiffs
- fixed — ccollab --debug option tells user where log is being saved
- fixed — Subclipse integration does not support anonymous repositories (Case 39203)
- fixed — Database dumps are incomplete when dumping a single review (Case 39420)

v4.0.832 — April 10, 2008

- added — Support for AccuRev Eclipse plugin
- fixed — Solaris does not understand test -e (Case 39079)
- fixed — Diff uploads appear to pick incorrect version (Case 38974)
- fixed — Defect description on review overview omits anything that looks like a tag (Case 38708)
- fixed — Notification emails stop working after server restart (Case 39102, 39066, 39173)
- fixed — Case error in custom field documentation (Case 39197)
- fixed — Performance improvement generating diffs (Case 39079)

v4.0.831 — April 7, 2008

- added — User creation trigger^[196] (Case 38762)
- added — Allow users to set skip unchanged^[346] option in diff viewer (Case 39051)
- added — Option to disallow non-author uploads^[177] (Case 38619)
- added — ccollab set prompts if no option value specified (Case 36979)
- added — ccollab set displays value for all options if no option specified (Case 36724)
- added — Support GIT diff variant with ccollab adddiffs (Case 39048)
- added — External diff preset^[535] for Beyond Compare (Case 38988, 37588)

- added — Collaborator GUI Client support for Linux x86_64
- added — [Syntax](#)^[354] highlighting for SQL (Case 38300)
- added — Tooltip showing when [reworked files](#)^[327] were last updated
- fixed — Correctly set windowing system parameter in Linux RPM client installer
- fixed — Collaborator GUI Client should persist size and location (Case 38906)
- fixed — Improve progress messages for ccollab addchanges (Case 36423)
- fixed — IE "remember me" cookies (Case 38947)
- fixed — syntax highlight "sbyte" as a keyword in C#
- fixed — Update P4V Tools import file for P4V 2007.3 (Case 38994)
- fixed — Syntax highlighting for PHP (Case 36489)
- fixed — When there are too many users, review creation page is slow (Case 38688)
- fixed — Better support for nested Subversion working copies (Case 38979)
- fixed — Only administrators can run [ccollab admin syncusers](#)^[698]
- fixed — Update SQL Server drivers; drop support for SQL Server 7.0
- fixed — ccollab adddiffs fails if files have different names (Case 37940)
- fixed — Minor performance improvements in diff emitting code
- fixed — do not display time in review deadline (Case 38948)
- fixed — Bad links in server upgrade section
- fixed — ccollab addfiles does not pick up SCM configuration (Case 36538)
- fixed — Review not displaying files (Case 39093)

v4.0.829 — March 26, 2008

- added — Support for GIT-style diffs in ccollab adddiffs
- added — Detect XML "encoding" header attribute and use to parse XML files with correct encoding (Case 38933)
- added — Indicate the number of reworks a file has gone through in the "Status" column of the [review summary page](#)^[327] instead of just saying "Reworked". (Case 38875)

- fixed — Error trying to upload or view files not in UTF-8 or certain binary files (Cases 38925, 38913, 38933, 38941)
- fixed — "Log user off" link should be present only if the account is logged in according to floating-seat rules (for example, auto-log-off after 1 hour), not by whether the user has logged off manually.
- fixed — "New comment" form should be disabled when no line is currently selected
- fixed — ClearCase Windows version paths garbled in viewer drop-down

v4.0.828 — March 25, 2008

- added — Separate licensing button "[update from smart bear](#)"^[92] to reduce confusion
- added — System property to specify the cache sizes for line parse and syntax coloring cache
- added — JMX beans for cache sizes; framework for other JMX beans
- added — More review information in notification emails (Case 38618)
- added — Include server configuration files in [debugging dump](#)^[163]
- added — [Debug and migration dumps](#)^[163] use form to select options instead of list of links
- added — Option to include server logs in [system data dumps](#)^[163]
- added — Incorporate [review dumps](#)^[164] into the new data dump form
- added — [Team Foundation Server](#)^[653] support (beta)
- added — Add "[log this user off](#)"^[209] to administrative user list (Case 38845)
- fixed — improved performance of caches for syntax and diff highlighting.
- fixed — ccollab addchanges should not create review when no files are selected (Case 36649)
- fixed — Error on some JVMs running [addcvsdiffs](#)^[561] (Case 38723)
- fixed — Getting blank screen when trying to input new license code (Case 38830)
- fixed — Binary characters blocking chat from working (Case 38825)
- fixed — User Login Prompt field and others should highlight hyperlinks automatically (Case 38841)
- fixed — "Log off" from one browser should log out of all browsers
- fixed — Password reset does not reset password for admin user (Case 38825)

- fixed — Improve performance of scm output processing (Case 38864)
- fixed — Force clear of Collaborator 2.1 cookies

v4.0.825 — March 18, 2008

- added — [Fun facts](#)¹⁷¹ help
- added — Client 'admin review finish' command
- added — Users can select browser to launch (Case 36294)
- fixed — Button text in planning phase of Review Overview page (Case 36946)
- fixed — Restore links to metrics definitions topic in manual
- fixed — Refreshing action items from clients counts you as logged in (Case 38546)
- fixed — Roles without participants should not be empty in table (Case 37001)
- fixed — Confusing instructions in the defect log box (Case 37002)
- fixed — AutoDetectingReader not working properly (Case 38239)
- fixed — Initialize database button style (Cased 37080)
- fixed — Rework cookie handling to comply more completely with Tomcat's specifications
- fixed — Add more information on Perforce trigger errors (Case 38624)
- fixed — Defects showing up with comment icons in the diff view gutter. (Case 38502, Case 38651)
- fixed — Client 'addsvndiffs' command fails with Cygwin svn. (Case 38285, Case 37943)
- fixed — Client installer reports server is too old when the server is unavailable. (Case 38682)
- fixed — Client prints stack trace when adddiffs finds no diffs (Case 38547)
- fixed — Update Tomcat jar to fix LDAP authentication issues (Case 38795)

v4.0.824 — March 6, 2008

- added — User configurable [Fun Facts](#)¹⁷¹ (Case 37885)
- added — Ability to get more than 10 [search results](#)³⁹⁸ (Case 38454)
- fixed — Action items need to update immediately when the tray notifier is clicked.

- fixed — Trying to auto-detect AccuRev and throwing exception instead of just skipping it. (Case 38197)
- fixed — Defects by User metrics differ from defects list report (partial fix). (Case 38443)
- fixed — Reports throw exception when filtered on invalid date (Case 38500)
- fixed — Use a different browser launching utility.
- fixed — Auto-login cookies are not cleared in IE after an upgrade from 821 (or earlier) to 823 (Case 38592)
- fixed — Various text updates for UI consistency (Case 37060)
- fixed — GUI clients should not log passwords in plain text.

v4.0.823 — March 3, 2008

- added — Select suggested new review title^[484] (Case 37152)
- added — Cache action items^[307] refresh connection for 20 mins
- added — Ability to capture debug log^[444] in GUI Client
- added — Upgrade Tomcat to 5.5.26
- fixed — Handling of system-administrator in LDAP configuration
- fixed — File upload description is not unicode clean (Case 36875)
- fixed — Clients ignoring proxy settings
- fixed — Change default action items refresh interval to 5 minutes
- fixed — Widget is disposed in tray notifier (Case 38262)
- fixed — Double quotes in chat turn in to quadruple quotes (Case 38408)
- fixed — Large text field does not resize automatically on "edit review" screen (Case 38405)
- fixed — Strike-through on defect text should not include "tracked external as" portion (Case 38208)
- fixed — Recognize CVS for individual files (Case 38417)
- fixed — Inserts or deletions at the end of file prevent classic view from loading (Case 37984)
- fixed — Custom fields editor shows wrong inputs when validation fails (Case 38214)

- fixed — Metrics discrepancies (Case 38443)
- fixed — Embedded database search results are case-sensitive (Case 38473)
- fixed — Defect report label is "Severity" when it should be "Type" (Case 38486)
- fixed — Reinstate user preference for disabling syntax highlighting
- fixed — Safari & Opera render <wbr> tag incorrectly (Case 38488)
- fixed — GUI Client and Tray Notifier should write to different log files (Case 38378)
- fixed — Keyword highlighting within intra-line diffs

v4.0.821 — February 21, 2008

- added — When word-breaking long continuous words, try to break on camelCase boundaries if possible (Case 38289)
- added — SCM server information now in the <artifacts> section of "collab admin review-xml" (Case 38261)
- fixed — Links in chat are corrupted, both hyperlinks and bug-links (Case 38319, 38337, 38330)
- fixed — Debug review dump cannot be unzipped (Case 38036)
- fixed — Custom report fails to run when "Idle Time" column is selected under SQL Server (Case 38240)
- fixed — Script error on review overview when review is in the completed phase
- fixed — Erroneous error "version content already sent" when using diff-shim application with Subversion under Windows (Case 38225)
- fixed — Tray notifier displays erroneous error (Case 36402, 37744, 36237)
- fixed — Erroneous "<wbr>" text displayed inside URL's (Case 38195, 38215)
- fixed — Make label for "Local path" more clear in the cross-platform GUI client (Case 38066)
- fixed — Fixed incorrect comment label of "DEDT" on upgraded databases (Case 38336)
- fixed — Custom review filter is partially ignored when looking at printable format (Case 38269)
- fixed — Incorrect Subversion check-in comment parsing (Case 38285)
- fixed — Hide and encrypt password configurations in the cross-platform GUI client (Case 37830)

- fixed — Large files were sometimes not showing up in the diff viewer (Case 38235)

v4.0.820 — February 12, 2008

- added — Support for [sym-links](#)^[712] in Subversion (Case 38038 and Case 38039)
- added — Reports and views now count "number of comments" as the number of comments made by users in the context of chatting, not including system messages like "created defect" or "file uploaded". (Case 37645)
- fixed — Bug upgrading older databases to build 819 (Case 38189)

v4.0.819 — February 7, 2008

- added — [Log off link](#)^[289] on the menu bar. (Case 37923)
- added — [Update button](#)^[92] on licensing screen to force update of license codes from SmartBear servers.
- added — Support for Perforce Eclipse Plugin (P4WSAD) version 2007.3.601 (Case 37916)
- added — Installer option to preserve [existing database settings](#).^[80]
- added — New icons for various operations
- added — Chat icons in [diff window](#)^[351] gutter show [unread conversations](#)^[387] with unread conversation icon.
- fixed — Oracle strings now support more than 1023 characters
- fixed — Vault integration case sensitivity.
- fixed — After completing a review to move it to rework, a refresh moves the review back to inspecting (Case 37927)
- fixed — Review cancel action should take user back to home page. (Case 37938)
- fixed — Adding files by diff does not handle rework status correctly (Case 37902)
- fixed — Support version name /main/0 as a valid predecessor
- fixed — Reduce chat load times.
- fixed — Template selection alignment is inconsistent (Case 38004)
- fixed — Support Subversion in languages other than English (Case 37537)
- fixed — Use "last changed revision" as Subversion local version

- fixed — AccuRev failing on Linux with capital letter in path (Case 37932)
- fixed — Asynchronously load file content for better browser performance.
- fixed — Trailing context lines has one too few lines. (Case 38020)
- fixed — Do not send multiple copies of emails to the administrator (Case 37954)
- fixed — Long text on review overview makes some information flow offscreen.(Case 37129)
- fixed — Links for dumping system data are confusing (Case 37922)
- fixed — AccuRev cannot auto-detect from path (Case 38052)
- fixed — When rolled up and changelist comments repeat, save space by indicating the number of repetitions
- fixed — Misaligned diffs (Case 38026)
- fixed — Restore ability to change the login prompt
- dropped — Eclipse plugin no longer supports Eclipse 3.0 (Eclipse 3.1 or better is required)

v4.0.818 — January 24, 2008

- added — Added [usage statistics](#)^[201] sub-page to the Admin section
- added — Added [documentation](#)^[435] for the GUI Client
- added — Added [documentation](#)^[533] for the Tray Notifier
- added — Added documentation for ccollab login command
- added — Downloadable Eclipse plugin as zipped-up eclipse update site (Case 36063)
- fixed — Log version number in GUI Client log
- fixed — Moving the attach file dialog on the review edit screen causes the dialog to disappear. (Case 37658)
- fixed — Restore ability to edit title after review completion (Case 34178)
- fixed — Database unavailable at server startup makes Collaborator require a restart. (Case 37848)
- fixed — [Add*Diff](#)s^[449] commands use of GUID's for changelist id is confusing to users (Case 37640)
- fixed — IE 7 does not like RSS feeds with DTD's in them (Case 37890)

- fixed — Overdue notice showing up on complete reviews on the action items lists (Case 37587)
- fixed — Invalid Subclipse info for svn servers with no path (hostname only) (Case 37665)

v4.0.817 — January 18, 2008

- fixed — Incorrect diffs from Subversion (Case 37133)
- fixed — Print product version number in Eclipse log (Case 37648)
- fixed — Script errors in classic view
- fixed — User short names are duplicated if names are too similar (Case 37704)
- fixed — Client installer no longer kills running client taskbar app (Case 37314)
- fixed — Predecessor version not found if file has many version; ClearCase only (Case 37666)
- fixed — Cannot configure multiple Perforce servers (Case 37736)
- fixed — ContentViewer must have a content provider when input is set (Case 37755)
- fixed — ASCII control characters in files cause "More Lines" operation to hang (Case 37718)
- fixed — GUI client needs to allow SCM specification and local path
- fixed — addactivity subcommand should show local synced version numbers (Case 37364)
- fixed — IE 6 fails to download custom reports
- fixed — Added ccollab logiin subcommand (Cases 36731, 36729, 36730)
- fixed — Comments misaligned at the point of a code insertion (Case 37747)
- fixed — Mandatory subscriptions not uniformly enforced on the server
- fixed — Clear Case fixes for named local versions
- fixed — CVS uploads from GUI client do not work (Case 37800)
- fixed — Make action item url's work in non-root contexts
- fixed — User account creation fails from administration screens (Case 37823)
- fixed — Grace seats are not handled properly

v4.0.814 — January 8, 2008

- added — Added commands "ccollab admin review participant assign", "ccollab admin review participant remove", and "ccollab admin review comment create "
- added — Added command "ccollab admin review defect create"
- added — Global option for SMARTBEAR_PROCESS_USER_WAIT
- added — Support clients working in ClearCase view directory (Case 37082)
- added — --creator option to "ccollab admin review create"
- added — add "ccollab admin review defect mark-external " and support defect id "last"
- added — [trigger talkback](#)¹⁹⁶ to set review access restriction (Case 36783)
- fixed — New user registration on login page fails (Case 37448)
- fixed — AccuRev integration predecessor algorithm should be "previous occupant" (Case 36970)
- fixed — Make skip unchanged preference work with new diff viewer (Case 36422, Case 37397)
- fixed — Intraline diff highlight expands to include entire SGML tags, making it hard to understand what actually changed. (Case 35430)
- fixed — 'ccollab set username' has poor error messaging (Case 37225)
- fixed — ' ccollab info' messaging has bad formatting (Case 37226)
- fixed — adddiffs with no third argument causes NPE (Case 37303)
- fixed — Default Perforce p4port to 1666 if not specified anywhere at all
- fixed — auto-detect ClearCase in view root directory
- fixed — Custom reports creates links too long for IE (Case 37551)
- fixed — Diff viewer title should lead with file name (but not full path), so it will show up nicely in the task bar. (Case 37547)
- fixed — Underscores occluded when intraline diffs wrap (Case 37436)
- fixed — Error in toolbar application when launching application twice (Case 37550)
- fixed — Empty Boolean type options cause NullPointerException (Case 37508)
- fixed — Diff viewer should scroll new selections somewhere toward the middle of the page. (Case 36634)
- fixed — Completed reviews should not use current date to determine if review is "overdue". (Case 37587)

- fixed — NullPointerException in CvsClientConfiguration. (Case 37574)
- fixed — read config files and ccollabgui scm config settings on a best-effort basis

v4.0.812 — December 21, 2007

- added — Added commands "ccollab admin review create", "ccollab admin review edit", "ccollab admin review delete"
- added — Ability for Administrators to change [access rules](#)^[175] on reviews in progress (Case 37190)
- added — Friendlier stalled review [notifications](#)^[302] (Case 37391)
- fixed — Vestigial new review remains after client error (Cases 37393, 23390)
- fixed — [ccollab addchanges](#)^[549] for AccuRev uploading files in lowercase
- fixed — Full line differences not highlighted (Case 37413)
- fixed — Track externally fails for defects in overall section of files (Case 37319)
- fixed — Side by side view has issues displaying deleted files correctly (Case 37412)
- fixed — Error installing server with Oracle or SQL Server databases

v4.0.811 — December 14, 2007

- added — [Email notifications](#)^[302] contain a footer indicating that the email was automatically generated.
- fixed — Improved performance of diff viewer for large files, especially with Unix or Macintosh line endings.
- fixed — Command line client erroneously reports ccollab addchanges works with CMVC.
- fixed — Emails going out from the system administrator rather than the default address (Case 37177)
- fixed — Perforce integration ignoring p4client or p4user if only one is set
- fixed — Better help for the command line client
- fixed — Triggers should not be required to respond with a well-formed document if they are not talking back (Case 37307)
- fixed — AccuRev integration throws NullPointerException in ccollab addstream.

- fixed — AccuRev integration displays wrong error message when not authenticated.
- fixed — Subscription fixes and access restrictions (Case 36793)
- fixed — Email notification option to disable for administrators; restoring migration files restores with notifications disabled. (Case 37285)
- fixed — Highlighted text does not honor user preference fonts (Case 37369)
- fixed — After changing the review deadline, the "Apply" button reverts the deadline to the default (Case 37382)

v4.0.810 — December 7, 2007

- fixed — StarTeam differences support in ccollab addstdiffs command (Case 37034)
- fixed — ClearCase `ccollab addactivity`^[603] should give empty predecessor for files new to activity (Case 37142)
- fixed — Support for ClearCase \0 versions (Case 36675)
- fixed — Error when getting SQL or CSV from custom reports in Internet Explorer (Case 37185)
- fixed — Mark external (defect) fail on review overview page (Case 37274)
- fixed — Tray notifier throws NullPointerException when double clicked upon startup (Case 36879)
- fixed — Perforce integration not including changelist number in review title
- fixed — Perforce integration not copying changelist description into overview field.
- fixed — NullPointerException in `addp4diffs`^[693].
- fixed — Additional logging in the email notification processor.

v4.0.809 — December 4, 2007

- added — ClearCase performance changes (Case 36819).
- added — `Chat pane`^[352] is masked when loading
- added — Add "review completion date" to `review_activity_summary`^[812] view (Case 37196)
- fixed — External diff launcher fails because of Windows absolute file names (Case 37175)
- fixed — Improved remember me cookie system; works with container managed role-based security.

- fixed — Custom fields copied from previous reviews gets wrong previous reviews (Case 37183)
- fixed — Installer fails to migrate from 2.1 if application is running at a non-root context path.
- fixed — Fix addversions argument parsing.
- fixed — Defect tracking integration not showing up for custom fields (Case 37147)
- fixed — AccuRev integration [addstream](#)^[552] was picking incorrect previous versions in some cases (Case 36970)
- fixed — New diff viewer ignores user font preference (Case 37159)
- removed — Undocumented report command; would not work with improved security model.

v4.0.808 — November 28, 2007

- added — Added SCM configuration options to cross platform GUI.
- fixed — ClassCastException in addstdiffs command (Case 37034)
- fixed — Manual pages were not loading properly in Eclipse
- fixed — Attach changelist fails in IE6 (Case 36932)
- fixed — Clean up font sizes in cross platform GUI for GTK systems.
- fixed — Removed spurious logging when database is known to be invalid.
- fixed — Floating license timeout is now one hour instead of four.
- fixed — Installer fails to remove old jars when updating the Eclipse client (Case 37009)
- fixed — Under certain circumstances, servers running with the embedded database could not be upgraded to 806 or 807 builds.
- fixed — Improve performance of the chat portion of the diff viewer (Case 37127)

v4.0.807 — November 19, 2007

- added — Do not allow reviews to move to inspection phase without [materials](#)^[316]
- added — (AccuRev only) Added support for [ccollab_addardiffs](#)^[552] for uploading arbitrary AccuRev differences with full context.
- fixed — Super-search box did not handle characters outside the Latin-1 range

- fixed — Action item "Response to Comments" not posted when new changelist contains only updated files (Case 36847)
- fixed — "Compare" menu in diff viewer lists all uploads as "1st" (Case 36931)
- fixed — ccollab addsvndiffs now includes full diff context instead of just 3 lines surrounding each change
- fixed — ccollab addsvndiffs now supports binary files correctly regardless of local line ending settings
- fixed — Inconsistent table cell alignment on review overview page (Case 36945)
- fixed — Custom fields cannot be reordered (one-off special database export error case)

v4.0.806 — November 15, 2007

- added — Defect state icons in the [diff viewer](#)^[351]
- added — Client commands for administering author subscriptions
- added — Client commands for administering file-based subscriptions
- added — Home Page menu option in the [tray icon context menu](#)^[534] (Case 36856)
- added — Web user interface accepts and displays Unicode input (Case 36697)
- added — Add submitted changelists support to [cross-platform GUI](#)^[435]
- fixed — Diff viewer should start with the first diff if user clicks on file name on review overview page (Case 36637)
- fixed — Participant list expansion does not happen on first apply (Case 36632)
- fixed — The ccollab addstream command requires being in a local workspace directory (Case 36350)
- fixed — Unable to edit defects in the Overall section (Case 36806)
- fixed — Editing defects does not set custom field drop-downs in Firefox (Case 36807)
- fixed — Under certain scenarios, comments needed to be marked read in all versions of a file before closing a review (Cases 36845, 36572)
- fixed — Printable report double-html-encoded text (Case 36877, 35540)
- fixed — Custom report "Recently Completed Reviews" did not properly filter against "completed" status

- fixed — Review title not set by default when uploading changelists with descriptive text (Case 36437)
- fixed — NullPointerException in tray notifier
- fixed — Enterprise organization field is too small (Case 36904)
- fixed — File subscriptions not working for Perforce paths (Case 36870)
- fixed — Anonymous Subversion has log entries with no author
- fixed — Archiving fails with blank screen. (Case 36973)
- fixed — Improved performance of archive queries.
- fixed — Trivial Reviews report should not contain canceled reviews (Case 36873)
- fixed — File subscription input fields too short; expanded to 255 characters (Case 36939)
- fixed — Explain to the user why the recent participants list is empty (Case 36941)
- fixed — Password overrides and ccollab set collab had confusing behavior.

v4.0.805 — November 5, 2007

- added — [AccuRev](#)^[542] only: New `ccollab addstream`^[552] command uploads differences pending promotion given an AccuRev stream name (Case 36530)
- added — User [RSS feeds](#)^[303] are now identified by a guid rather than by user name.
- added — Review completion date in [review overview](#)^[320] (Case 36679)
- added — Eclipse review wizard^[484] suggests a new review title.
- fixed — Eclipse synchronize view actions missing icons
- fixed — Text appearing in file overview display (Case 36704)
- fixed — Eclipse "add to new review" and "add to existing review" should be consolidated.
- fixed — Variables not being substituted in stalled review emails (Case 36703)
- fixed — No password (unset) causes issues in Eclipse plugin and system tray notifier (Case 36689)
- fixed — `ccollab set collab ""` does not overwrite server-url properly (Case 36725)
- fixed — Some database dump files could not be reloaded because of improperly encoded special characters (Case 36773)

- fixed — Installer does not properly add strictAuthOnly attribute to realm definition.
- fixed — 4.0 clients fail to authenticate when server is LDAP authenticated. (Case 36739)
- fixed — Do not specify password argument to P4 commands unless specifically configured to do so.
- fixed — Support spaces in subversion committed file names.

v4.0.804 — October 29, 2007

- added — Performance improvements on Review Overview screen
- added — Handle Perforce ticket mode, automatically login for a new ticket if necessary
- added — Use Add to Review Wizard ^[484] in GUI Client
- fixed — Add view for custom field drop-down values (Case 36607)
- fixed — Bogus scrollbar when window shrinks in non-wrapped side by side diff (Firefox only) (Case 36209)
- fixed — Clicking on skipped lines section puts non-number in the new chat line number (Case 36561)
- fixed — With short filenames in the same directory, icon column is too wide.
- fixed — Binary file type field should be longer than 255 chars (Case 36640)
- fixed — Remove mandatory dependency on Eclipse CVS plug-in (should be an optional dependency)
- fixed — New subscription fails (Case 36656)
- fixed — Improved logging and error messaging when send email fails (Case 36641)
- fixed — Next/Previous highlights the wrong line for deletes (Case 36635)
- fixed — Support spaces in file/path names in Subversion (Case 36360)

v4.0.803 — October 18, 2007

- added — [Action items](#) ^[307] on homepage refresh without a complete page refresh.
- added — Documentation on configuring [LDAPS](#) ^[106]
- fixed — Custom reports broken when using embedded database (Case 36470)

- fixed — addactivity command fails when file paths contain spaces (Case 36463)
- fixed — NullPointerException in ccollab addchanges (Case 36507)
- fixed — Metrics by Review report only showing reviews with defects (Case 36481)
- fixed — Eclipse plugin stores passwords in plain text (Case 35694)
- fixed — actionitems command does not list action items (Case 36505)
- fixed — addchanges command should not be available when SCM is Perforce
- fixed — Oracle backend should store integers as Number(10) so external tools will recognize as Number.
- fixed — Possible fix for tray notifier crashing
- fixed — Comment promotion prevents bad comments from being marked read
- fixed — External diff viewer link should not be displayed when showing only one version (Case 36451)
- fixed — Jump to next line sets the line to -1 if no more defects
- fixed — Installer fails to preserve database credentials on upgrade (Case 36540)

v4.0.802 — October 12, 2007

- added — New field in review_activity_summary view, author_rework_hours (Case 35473)
- fixed — Minor UI improvements on review overview page.
- fixed — Optimized syntax coloring for very long lines and large files.
- fixed — Search box now jumps directly to review if the search text matches a review id. (Case 36390)
- fixed — Selection causes text to move around in some parts of diff viewer. (Case 36210)
- fixed — Firefox refreshes the review overview page twice instead of the once required. (Case 35882)
- fixed — Tray notifier should to to "normal" mode if no more urgent action items.
- fixed — Version ordering on review overview screen was incorrect if user preference set to alphabetic.
- fixed — System tray notifier was not shutting down on upgrade.

- fixed — Upgrading a server with existing LDAP configuration results in 403 errors from the server.
- fixed — In diff viewer, selecting text results in a script error (IE only)
- fixed — When license code is invalid, the node id is not displayed, but is required in order to resolve the issue.
- fixed — Minor changes to documentation.

v4.0.801 — October 8, 2007

* FIRST RELEASE OF v4.0 BETA *

- BIG NEW FEATURES
- added — Revamped [diff viewer](#)^[351] with [over-under view](#)^[351], much faster loading times, more [jump/search features](#)^[350], and [hide-able chat pane](#)^[385]
- added — [Subscriptions](#)^[301] allow users to get on a review with author- or file-based rules
- added — ["Recently Completed Reviews"](#)^[307] list on home page
- added — [Customized Review Report](#)^[407]
- added — ["New Review"](#)^[309] page is now a single page rather than a wizard, cutting down drastically on the time it takes to create and start a new review
- added — Open differences in local [diff viewer](#)^[351]
- added — [Review deadlines](#)^[181]
- added — Proactive [notification system](#)^[302] alerts you to reviews that are stalled
- added — [RSS feed](#)^[303] for [Action Items](#)^[288]
- added — Command-line structure reorganized and many [new options](#)^[462] added
- added — Extensive Command-line help
- added — [Tray notifier](#)^[533] for Windows and Linux
- added — [Enterprise organization](#)^[212] specification for reviews
- added — [Annotate files](#)^[326] in overview screen with one-line comments that are visible without opening files

- added — SCM system can usually be detected automatically
- LITTLE NEW FEATURES
- added — "[Fun Facts](#)^[171]" feature on home page
- added — [User list drop-down](#)^[312] now support substring-based searching for names
- added — Custom reporting view [defects_by_file](#)^[812]
- added — Command-line client now connects to server much more quickly
- added — Addchanges from multiple SCM configurations in one command
- added — All global options can be [overridden](#)^[447] on the command-line
- added — Special last keyword can be used on the command-line to refer to the review that was last created
- added — Version control system is automatically detected by the command-line client in most cases
- added — Ability to [disable all metrics](#)^[175] displays (Case 25888)
- added — Ability to edit list of files before they get uploaded for [ccollab addactivity](#)^[603] and [ccollab addtrack](#) (Case 35009, 35383)
- added — Home page [action items](#)^[307] have more information and are split by incoming, outgoing, and more
- added — Many UI elements can now expand and contract
- added — Date input boxes now use a proper calendar widget
- added — [Database diagnostics](#)^[201] help you and tech support diagnose problems
- added — Cleaned up [user activity statistics](#)^[208] on the Admin/User page so it is easier to see how many licenses you really need
- added — User initials algorithm now supports "Last, First" semantics
- added — Button on New Review page lets you pick up custom field settings from the previous review
- added — Added on-wire compression for more web page elements for faster page-load times

- added — Speed improvements for the [Review Overview page](#)^[316], eliminating 60% of the SQL queries
- added — Speed improvements for the [Chat pane](#)^[385], making the common no-op case fast
- added — [Review columns](#)^[327] are hard to differentiate with many reviewers (Case 35450)
- added — Improved [defect icons](#)^[390] for red-green colorblind users (Case 35023)

- FIXES
- fixed — Syntax highlighting got confused with certain sequences of escape characters in C-style strings
- fixed — Subversion checkout at root of local disk fails to upload files properly (Case 34992, 35056)
- fixed — New files/directories caused Eclipse plug-in to fail to find other modifications (Case 35664)
- fixed — Users could re-open review by continuing to comment; now must explicitly [re-open](#)^[320] the review with a button.
- fixed — When server is awaiting database upgrade, clients were reporting "incompatible server" instead of "needs database upgrade" as the error message (Case 32710)
- fixed — Incorrect handling of non-UTF-8 characters in communications with the Perforce server (Case 36367)
- fixed — Reporting [database view](#)^[812] review_activity now includes all participants, not just those with non-zero activity time

11.2.10 Version 2

v2.1.731 — November 29, 2007

- fixed — Fix activity changelist editing of LOCAL versions. (Case 36839)

v2.1.730 — October 30, 2007

- added — Add loc_unversioned field to the review_version_summary containing the line count from files not under version control (Case 36613)
- fixed — Improper handling of Unicode characters in Perforce changelist text. (Case 36737)

- fixed — Subversion integration fails when spaces in file names

v2.1.729 – October 16, 2007

- fixed — Installer can throw NullPointerException when installing server under Java 1.4 (Case 36080, 36093, 36247, 36242, 36243)
- fixed — Metrics by review report only shows reviews with defects (Case 36481)

v2.1.728 – September 14, 2007

- added — Support for editing the list of files being uploaded for [ccollab addactivity](#)^[603] (Case 35009, 35383)
- fixed — Last activity date was being updated from Windows GUI Client even if the user was not logged in, only when a non-floating license code was installed
- fixed — Perforce trigger was blocking check-in on integrate even with --ignoreintegrate is set, if additional files were added as part of the integration and therefore tagged as "branch" by Perforce (Case 35897)
- fixed — Now impossible to change login or password if LDAP/Active Directory is being used (Case 36052)
- fixed — User permissions on views were being destroyed when views were recreated in Oracle and MySQL

v2.1.727 – August 24, 2007

- added — First release of [AccuRev support](#)^[542]
- added — [Customizable text](#)^[172] on the login screen instructing the user which account to use (Case 35653)
- added — [Recent participant list](#)^[312] should go back only 30 days so older users disappear (Case 35685)
- added — ccollab addchangelist now supports multiple changelists on the same command-line
- fixed — URL encoding error externalizing a defect when a quote character appeared in the defect text (Case 35638)
- fixed — Comment promotion error with comments on deleted files in rolled-up view (Case 35698)

- fixed — Some custom reports views were not available under Oracle when custom field titles were longer than 30 characters (Case 35420)
- fixed — User preference for "start with latest" versus "start with base" not being honored with mixture of local and committed changelists (Case 35597)
- fixed — Not properly encoding control characters (below 0x20 ASCII) in database dump XML files
- fixed — Installing server component multiple times switching databases between embedded and SQL Server causes invalid configuration (Case 35488)

v2.1.725 — August 1, 2007

- added — Variable substitutions^[149] for review and defect custom fields^[235] (Cases 35552, 35556)
- added — Now only administrators can un-cancel a canceled review (Case 35502)
- fixed — Next/Prev buttons broken in the New Review Wizard^[309] (regression from build 724) (Case 35491)
- fixed — Default values for defect custom fields not showing up under IE 6 in the side-by-side view chat^[385] area (Case 35551)
- fixed — User could download file content from the /data servlet without login credentials (Case 35580)
- fixed — User preference^[291] for whether to display "previous" or "base" version by default in side-by-side view was selecting the wrong thing with files not under version control (Case 35476)
- fixed — collab addchangelist^[725] with Subversion^[710] puts the wrong text in the title of the review if the changelist description starts with the letter "r" (Case 35452)
- fixed — collab addchanges^[598] with ClearCase^[583] invoked from different subdirectories can insert "." path components thereby making comments not promote across versions properly (Case 35575)
- fixed — Server installer was not setting the LDAP system administrator property (Case 35477)

v2.1.724 — July 23, 2007

- added — Support for Unicode text files in the diff viewer^[351]
- added — Multiple conversations for binary files in side-by-side view

- added — Support for Python and Visual Basic syntax coloring in the side-by-side view (Case 35427)
- added — Support for the UltraCompare textual [diff file format](#)^[45†] (Case 35343)
- added — Subversion trigger for [creating a review](#)^[728†] should allow for setting the review title and overview text (Case 35252)
- fixed — Double-clicking the "Accept" button when there is text in the comment box can result in duplication of the comment and "Accept" text in the conversation history (Case 35384)
- fixed — [ccollab addcvsdiffs](#)^[56†] does not use absolute RCS server paths when a file has been added (Case 35345)
- fixed — Review title limited to 128 characters when editing review information after the review has started, whereas the limit is 255 when creating a new review (Case 35399)
- fixed — [External bug URL](#)^[184†] link was not honoring BUGSUBJECT or BUGID special fields (Case 35419)
- fixed — Files now sorted case-insensitive (Case 34511)

v2.1.723 — July 13, 2007

- added — New command-line command `ccollab addfiles` for uploading files not under version control (Case 35268)
- added — Display the official, permanent link to a review at the top of the [Review Summary](#)^[316†] page (Case 35277)
- added -- Now supports Eclipse v3.3; changes include: Removed hidden popup that was making help content invisible, Removed byte order mark in Eclipse help
- fixed — When role disallows editing/deleting defects, participant cannot even edit/delete his own defects (Case 35272)
- fixed — Able to make a new [conversation](#)^[385†] on line 999999 (Case 35317)
- fixed — Spurious error message when uploading files using v2.1 [client](#)^[445†] against v2.0 server (Case 35263)
- fixed — Create-Review [trigger](#)^[196†] was not being executed when the command-line client created the review (Case 35128)
- fixed — Removed hidden popup in Eclipse v3.3 that was making help content invisible

v2.1.721 – July 5, 2007

- added — ClearCase ccollab addactivity^[603] should diff re-bases and integration branch with --diffintegration (Case 34382)
- added — Configurable minimum timeout for AJAX chat refresh rate^[173], plus restrict per-user refresh rate so as to not swamp the server or the browser with chat-refresh requests
- fixed — Cannot continue the review due to "unread comments" when in fact all comments are read and the "unread" ones are just rolled up (Case 35163, 35104)
- fixed — Some trigger variables^[149] were not being replaced correctly (Case 35128)
- fixed — Client installer^[425] does not check for an existing trailing semi-colon when updating the Windows PATH environment variable (Case 34989)
- fixed — Stop logging spurious error messages when the database has no tables (Case 34890)
- fixed — ClearCase version of ccollab addversions not properly handling files with predecessor version main/0 (Case 35144)
- fixed — Cannot get past "database needs updating" screen when MySQL^[60] auto-increment settings do not start at 1 (Case 35141)
- fixed — Report data broken when reporting user-time when using the embedded database (Case 35104)
- fixed — Migrating data^[96] into Oracle failed when custom field title was blank
- fixed — Migrating file data from review dump put the content in the wrong place when the user overrides the location of the content cache
- fixed — Leaking database connections when "download files" command was used. Connections were reclaimed eventually but wasted resources.
- fixed — Perforce trigger truncated changelist description lines at '#' (Case 35271)

v2.1.719 – June 18, 2007

- fixed — ccollab addchanges^[724] fails for Subversion checkout at file system root (Case 35056)
- fixed — Windows command-line invocations not being parsed properly in certain special cases
- fixed — Database cleanup for exceptional case on multi-core servers where a bug in a previous build could cause a comment/defect to not be associated with a visible conversation, thereby making a review impossible to complete (Case 35074)

- fixed — Quoted strings in C-style languages could cause a line of code to be incorrectly colored in the side-by-side view if it contained escaped quotes (Case 35048)

v2.1.717 — June 15, 2007

- added — Option to override the maximum file size for a review. (Case 32313)
- fixed — [Perforce trigger](#)^[701] broken when files have been truncated due to excessive length. (Case 32313)
- fixed — Reverted files show up as "Reworked". (Case 34592)
- fixed — Files not contained in directories display incorrectly in [review overview](#)^[327] screen.
- fixed — Remove spurious log messages about uploaded files not having previous version as this is the expected condition.
- fixed — Race condition prevents some pages from loading and causes others to only be partially loaded. (Case 35051)
- fixed — Admin [license page](#)^[91] displays the wrong number of licenses.

v2.1.714 — June 8, 2007

- fixed — Web page can take forever to load (or new comment takes forever to appear) when emails are being sent out due to the action just submitted (Case 34986)
- fixed — URL validation in input fields should check format but not actually attempt to connect (Case 34997)
- fixed — [Perforce trigger](#)^[701] was blocking non-Collab-related changes to the changelist spec, specifically in the case of creating a new changelist from scratch (Cases 34436, 34812, 34915)
- fixed — [collab_addchanges](#)^[724] fails for Subversion checkout at file system root (Case 34992)
- fixed — [Variable substitution](#)^[149] system could skip a variable if you strung together many variables in a row (Case 35002)

v2.1.713 — June 6, 2007

- fixed — Drop-down items not displaying current values (Case 34963)

v2.1.712 — June 5, 2007

- added — Drop-down typed [custom fields](#)^[235] can now be given a default value
- added — ClearCase only: [ccollab addactivity](#)^[603] now supports diffs against latest version from integration branch (Case 34382)
- fixed — Cannot [add yourself](#)^[322] to a review if you are not already a participant or an administrator (Case 34834)
- fixed — Custom field description text not being displayed in the "[create defect](#)^[390]" form (Cases 34671, 34861)
- fixed — Binary file [identification pattern](#)^[187] should not be case-sensitive (Case 34895)

v2.1.711 — May 30, 2007

- added — Subversion server-side hook for automatically [creating a review](#)^[728] whenever a change gets submitted
- added — Subversion server-side hook for [uploading revision data](#)^[728] to the server after a change gets submitted
- added — Manual page describing when [notifications](#)^[302] are sent to users
- added — More documentation and troubleshooting information about Perforce [server-side triggers](#)^[701]
- fixed — Database connection errors or NullPointerException errors in a race condition when sending email notifications
- fixed — Error running [ccollab addsvndiffs](#)^[726] with [Subversion](#)^[710] clients prior to v1.4.0.
- fixed — Scrollbar missing in [chat](#)^[385] window for binary files (Case 34623)
- fixed — Do not display "0 changelists" under "local changes" when all changelists are in fact checked in (Case 34798)
- fixed — Broken links to manual pages on client tools when [attaching materials](#)^[312] to a review
- fixed — Supplying a blank name for a role configuration causes problems in the administration GUI

v2.1.709 — May 21, 2007

- added — Speed enhancements for the [diff viewer](#)^[351] web view.
- added — ClearCase [ccollab addactivity](#)^[603] support for diffs against integration branch (Case 34382)

- added — Subversion [server-side hook](#)^[728] for ensuring that files are reviewed before they are checked in.
- added — User's Guide chapter for [recommended hardware](#)^[146] and how to [increase server speed](#)^[146].
- fixed — CVS variant of `ccollab addversions` uploaded correct file content but incorrectly marked the versions as "added" in the web GUI (Case 34617)
- fixed — Subversion command-line can get too long under Windows with large numbers of files.
- fixed — SQL error trying to archive files using Oracle, SQL Server, or embedded database back ends.
- fixed — Subversion Eclipse plug-in for Eclipse v3.1 would fail to upload files if uncontrolled files were left in a project and the Subclipse preference "Select unversioned resources on commit" was enabled.

v2.1.708 — May 16, 2007

- added — New [Perforce trigger](#)^[70] for automatically updating changelist description with information about the associated review.
- added — Support for using wildcards with paths when using `ccollab addchanges` with SCM system type none under the Windows cmd shell
- added — Support for [Subversion's](#)^[710] `svn:externals` feature wherein a repository contains a soft link to another repository.
- added — Speed enhancements for the [Review Summary](#)^[316] page when viewing very large reviews.
- added — Speed enhancements for common operations in the Subversion integration.
- added — "[Obfuscated Dump](#)^[163]" for both review-specific and whole-system database dumps to allow customers to send SmartBear tech support data dumps without sending any sensitive information.
- fixed — ([Eclipse/Subversion plug-in](#)^[500]) Changes from different resources but in the same repository were showing up in different changelists (Case 34544)
- fixed — The [command-line client](#)^[445] could get confused when `svn switch` was used on a local check-out
- fixed — Eclipse Subversion plug-in can pick up the wrong repository configuration (Case 34399)

- fixed — Suppressed spurious (and harmless, but annoying) error messages we were printing to the Subclipse console
- fixed — URL's inside review comments can get mangled if they are very long (Case 34461)

v2.1.707 — May 7, 2007

- added — Optimized subversion integration.
- fixed — Side by side not resizable when wrap lines turned off.
- fixed — Subversion integration did not properly handle added file in added directory.
- fixed — Recent participants list should only include participants from the selected workflow.
- fixed — System administrator account matched incorrectly when [LDAP](#)^[106] configured.
- fixed — Content archive fails when using embedded database.

v2.1.706 — May 1, 2007

* FIRST NON-BETA RELEASE OF v2.1 *

- added — Documentation for [SSL configuration](#)^[117].
- added — Author should get email notification when (a) Author is required to finish the review and (b) everyone else is finished, even if those other users are not themselves required to finish the review.
- added — Passwords entered on the command-line now echo asterisks (Java v1.6 only) (Case 34477)
- added — [Eclipse Subversion integration](#)^[500] can now add files to a review from the Synchronized view (Case 34442)
- added — Tutorial box about how [reports](#)^[407] are cached and how to update them.
- fixed — ccollab adddiffs failing to recognize a custom diff format (Case 34465)
- fixed — [ccollab addactivity](#)^[603] adds wrong predecessor when multiple versions in activity are not predecessors of each other (Case 32382)
- fixed — Subversion integration can upload HEAD version instead of HAVE in certain cases (Case 33456)

- fixed — Subversion integration threw exception when an uncontrolled file was added to a review (Case 34427)
- fixed — Subversion integration uploading incorrect file content when multiple parent directories, some not direct parents, are involved in the same changelist (Case 34328)
- fixed — Perforce integration throws exception if changelist state changes (Case 34308)
- fixed — Keyboard shortcuts^[350] in the web user interface stopped working when the content view changed
- fixed — Switching roles on two participants in a review did not reset the states of those users, which could result in reviews that cannot be closed and confusing Action Item messages
- fixed — Search box^[398] should trim leading and trailing whitespace from text -- handles common case when pasting text from a web browser
- fixed — In brand new installs, if the license server cannot be reached users get a blank page after login.

v2.1.705 — April 24, 2007

- added — Command line client needs to pick up Perforce changelist comments as title for new reviews.
- added — Command line client uses Subversion changelist comment as title for new reviews.
- added — Command line client uses Clear Case activity titles as review title for new reviews.
- fixed — Subversion exception adding an uncontrolled file to a review (Case 34427)
- fixed — Eclipse; Subversion arrows not appearing on select files page. (Case 34451)
- fixed — Reverted files do not show up properly if using different clients; Eclipse and command line.
- fixed — Invoking Windows commands with embedded spaces fails. (Case 34445)
- fixed — Keyboard shortcuts mask well known Windows shortcuts. (Case 34460)
- fixed — Custom fields can get into a state where changing a single custom field changes multiple fields (Case 33700)

v2.1.704 — April 19, 2007

- added — Perforce trigger^[701] to check that a review has been created, but not care if that review has been finished.

- added — Reinvite preference expanded to mean "works independently".
- fixed — [Perforce GUI integrations](#)^[699] fail to find p4 after upgrading to 2.1.
- fixed — When [migrating](#)^[96] from [SQL Server](#)^[63] or [Oracle](#)^[66] to [MySQL](#)^[60], installer fails to properly configure user authentication. (Case 34353)
- fixed — Time-in-review database view updated to ignore time spent during "rework" phase.
- fixed — Specifying multiple files to addchanges fails for Subversion (Case 34354)
- fixed — Subversion added files showing up as modified (Case 34337)
- fixed — Search results should not return reviews that the current user does not have access to.
- fixed — Case sensitivity problem in Perforce trigger (Case 34288)
- fixed — Side by side version titles not appropriate for checked in changelists (Case 33422)
- fixed — [Eclipse plugin subversion integration](#)^[500] does not properly set the base revision (Case 34108)
- fixed — [Eclipse plugin subversion integration](#)^[500] does not handle spaces in filenames correctly (Case 34008)
- fixed — Subversion integration not finding reverted files (Case 34400)
- fixed — Uploading new changes to a review changes the state, but not the phase of the review.
- fixed — Action Item message for authors is misleading if the author is required to complete the review.
- fixed — External defects should be drawn with strike through and italic style (Case 34023)
- fixed — Externalized defect system should link to configured create defect URL (Case 34021)
- fixed — Remove usernames from Subversion URL's (Case 33425)
- fixed — Where possible, derive the author from the Subversion URL (Case 33806)
- fixed — Remove usernames from Subversion server config (Case 33807)
- fixed — Action item text did not always make sense for users whose activity is required to initiate phase change.
- fixed — Authors who marked reviews finished had no action item at all while waiting for other participants.

- fixed — Hide-show previous changelists must be sticky (Case 33888)

v2.1.703 — April 11, 2007

- added — New role-specific option to have participants not re-invited to a review when another user makes a comment
- added — New role-specific option to control whether this role is allowed to change [review details](#)^[320] while the review is active (Case 34302)
- added — Allowing edit of the [review details](#)^[320] after the review is complete, but only when you are a participant or admin (Case 31478)
- added — Special warning when a user is viewing a review but is not a participant in that review (Case 34026)
- added — Display the title of the current workflow in the [Review Overview](#)^[320] section (Case 33972)
- added — Now supporting either ccollab set scm perforce or ccollab set scm p4 to [configure](#)^[69] ccollab Perforce settings.
- fixed — Long comment text does not wrap in chat viewer. (Case 34289)
- fixed — CMVC integration fails when not all fields are populated
- fixed — Subversion was not properly handling file changes when parent directories were moved or deleted
- fixed — Subversion was not properly handling file changes when the parent path was the result of a directory-move, as with the first check-in on a new branch
- fixed — Some non-ASCII characters not displaying correctly when entered in the AJAX [chat component](#)^[388] in side-by-side view (Case 34050)
- fixed — HTML characters in the review title cases [Review Overview](#)^[316] page to display incorrectly (Case 34281)
- fixed — In [ClearCase](#)^[583], [ccollab addactivity](#)^[603] picks wrong latest version when not checked out (Case 33771)
- fixed — Email notifying a user that they have been added to a review did not include their role (Case 34165)
- fixed — [Reinstalling](#)^[425] command-line client sets SCM configuration to Perforce when Perforce is installed, even if the user specifically switched to a different SCM system (Case 33741)

- fixed — Confusing error message (UnknownHostException) printed to the console instead of a useful message (Case 33858)

v2.1.702 — April 3, 2007

- fixed — NullPointerException getting defect custom field causes chat to stop updating (Case 33947)
- fixed — Externalized defects^[396] should be drawn with a line through the text (Case 34023)
- fixed — Externalized defects should not hide other menu items (Case 34024)
- fixed — In-chat defect log on Review Summary^[326] page does not show custom field^[236] values (Case 34019)
- fixed — Deleting a defect from the Review Summary page does not confirm with dialog (Case 34018)
- fixed — Pending Perforce^[678] changelist was not considered pending when P4CLIENT not specified
- fixed — Removed tutorial boxes in create review wizard when user preferences demand it
- fixed — CMVC upload failed when a track had no parts

v2.1.700 — April 02, 2007

- added — Eclipse^[500] support for Subversion (both pre-commit and post-commit)
- added — Eclipse^[490] support for ClearCase (pre-commit)
- added — SSL support^[117] on web server and all clients
- added — Oracle^[66] back-end database support
- added — Externalized defects^[396] feature
- added — Keyboard shortcuts^[350] in side-by-side view
- added — CMVC integration (Case 33617)
- added — Special alert when a pop-up blocker prevents one of our web-application windows from opening (Case 33041)
- added — Added filenames to the "Defect List" report^[407] (Case 33228)
- added — Full Java example file to the Java Client Library documentation

- added — Support for [importing diffs](#)^[449] with inconsistent line endings (Case 33427)
- added — Support Perforce branch-add state (Case 26437)
- added — [Command-line](#)^[445] now prints the review ID when a new one is created (Case 33344)
- added — Option to disable "[system dump](#)^[96]" link for non-administrators
- added — [Command-line](#)^[455] option --nobrowser
- added — New review wizard now displays the review title on all screens (Case 33750)
- added — Smarter algorithm for filenames with very long paths in side-by-side view (Case 33490)
- fixed — do not include deleted files in the [ZIP file](#)^[328] of review files.
- fixed — Underscores being clipped in word-wrapped view on certain browsers on certain platforms (Case 33699)
- fixed — Web GUI not allowing more than 128 characters for review title, but 255 characters are actually allowed (Case 33900)
- fixed — Deleted files fail to show deleted content (Case 33468)
- fixed — [Perforce integration](#)^[678] was not honoring \$P4CONFIG or the p4 set -s variables under Windows
- fixed — Notification when removed from review should come from user, not admin (Case 33354)
- fixed — Newly created defect custom fields show up as review custom fields (Case 33966)
- fixed — Proper default mono-space fonts for platforms lacking the "Courier New" font
- fixed — Perforce files opened for integrate should use head version as previous, not the have version (Case 33554)
- fixed — Comment and Defect icons not showing up properly when changelists were rolled up (Case 33621, 33676)
- fixed — Improved search / error-handling for external command-line tools
- fixed — Subversion upload was failing sometimes when a deleted file was in the changelist (Case 33689)
- fixed — SQL Server was not escaping characters correctly in certain LIKE queries
- fixed — [p4collab](#)^[699] now contains a usage statement if you run it from the command-line

- fixed — [Subversion integration](#)^[710] can now find svn.bat and other non-standard command-line clients
- fixed — Perforce commit prevention [trigger](#)^[701] did not honor the "[canceled](#)^[320]" state for reviews.
- fixed — Custom field [reporting views](#)^[812] can take so long to complete that the query times out (Case 33446)
- fixed — When review is deleted, activity records should be deleted as well (Case 33496)
- fixed — When uploading files from Subversion, ignore both `_svn` and the more common `.svn`.
- fixed — Cancel AJAX web requests when window closes; was causing browser to run out of connections (only 2 are ever allocated) and then hang (Case 33557)
- fixed — Web GUI URL auto-formatter is too greedy (Case 33636, 33907)
- fixed — Perforce addchanges [trigger](#)^[701] can fail with no error message (33584)
- fixed — Error parsing ClearCase output when backslashes were used (33224)
- fixed — Viewing XML files sometimes shows SGML character entities instead of proper characters (Case 33280)
- fixed — Could throw NPE when Java's mailcap file is corrupt
- fixed — Could get database error when inserting too much text into a field
- fixed — No notifications when you cancel the review from the review planning phase (Case 33369)
- fixed — When you have [exceeded your license](#)^[88] the system now allows the existing users to continue using the system and shuts out only the additional users, rather than shutting out everyone all together.

v2.0.621 — April 9, 2007

- fixed — Allow editing of review data in complete phase. (Case 31478)

v2.0.620 — April 2, 2007

- fixed — NullPointerException getting defect custom field causes chat to stop updating (Case 33947)

v2.0.619 – March 26, 2007

- fixed — Web pages refer to external resources (akamai.com, yimg.com) (Case 33192, 33876, 33885)

v2.0.618 – March 13, 2007

- fixed — `ccollab addchanges new` fails for `Subversion` local changes (Case 33784)

v2.0.617 – March 9, 2007

- fixed — Allow install as non root user on Unix systems. (Case 33622)
- fixed — Running `ccollab addp4diffs ...` hangs on binary files. (Case 33581)
- fixed — `Perforce trigger` never lets ktext files be checked in. (Case 33696)
- fixed — Running `ccollab addchangelist ...` fails when there is a deleted file in the Subversion revision (Case 33689)
- fixed — Overall chat was missing unread flags. (Case 33633)

v2.0.612 – March 1, 2007

- fixed — `Perforce addchanges` trigger fails with no error message (Case 33584)

v2.0.611 – February 28, 2007

- fixed — Running `ccollab set scmconfig p4 ...` had no effect on Perforce integration.
- fixed — `P4V integration` invoked Windows executable.
- fixed — Do not include deleted files in download (Case 33537)
- fixed — Null Pointer Exception when uploading file diffs (Case 33553)
- fixed — CVS diff parsing (`addcvsdiffs`) can fail if files have mixed line endings (Case 33427)

v2.0.609 – February 21, 2007

- fixed — [Uploading raw diffs](#)^[449] of binary files from Subversion could result in line-ending transformations
- fixed — [Uploading raw diffs](#)^[449] with mixed line endings styles now works even if the diff generator program was not aware of the line-ending problem (Case 29801)
- fixed — Can get "Illegal Operation" exception trying to upload file content when only line-endings have changed (Case 33533, 33306)
- fixed — [Subversion integration](#)^[710] fails to upload changes, either local or checked-in, when directory operations were involved (Case 33097)
- fixed — [Subversion integration](#)^[710] fails to upload atomic changelists when one of the files is deleted
- fixed — In [ClearCase](#)^[583], [ccollab addactivity](#)^[603] was failing on directories (Case 33511, 33520)
- fixed — [Perforce](#)^[678] branched adds not being added to the review (Case 26437, 32517)
- fixed — [ClearCase](#)^[583] parsing of \main\LATEST can fail, and the selection of which version is "latest" was wrong in certain cases
- fixed — The reviewcustom and defectcustom [database view](#)^[812] definitions were so inefficient that with a complex [custom field](#)^[236] configuration the database can time out waiting for the query to complete (Case 33446)
- fixed — When a review is deleted, [activity records](#)^[806] in the database are not deleted as well, leading to orphaned rows. This did not affect the operation of the software but it could be confusing when making custom reports (Case 33496).

v2.0.608 – February 9, 2007

- fixed — [Perforce trigger](#)^[701] fails to ignore canceled reviews (Case 33402)
- fixed — On Windows, Subversion integration can fail to find svn client

v2.0.606 – January 19, 2007

- added — Many more [database views](#)^[812] for [external reports](#)^[806]
- added — [Review overview](#)^[316] screen should not refresh automatically when the user is adding a comment or defect. The auto-refresh can cause the form fields to be erased (Case 25572)

- fixed — Server no longer requires external license server for user [login](#)^[289]
- fixed — [Removing](#)^[322] unavailable reviewers should close the review (Case 32302)
- fixed — [Overall chat](#)^[326] needs unread comment flags (Case 31491)
- fixed — Uncontrolled files prevent [Review Display](#)^[357] from being shown
- fixed — Javascript error on [Review Display](#)^[357] (Case 32202)
- fixed — User font [preferences](#)^[297] ignored under certain browsers/platforms (Case 27991)
- fixed — When you submit Subversion change-set by ID with [ccollab addchangelist](#)^[725], files that were deleted in the changelist are not uploaded at all. This does work when uploading files not yet checked in (Cases 29961, 30500, 33097)

v2.0.602 — January 11, 2007

- added — Full support for [ccollab adddiffs](#)^[449] and addcvsdiffs/addsvndiffs/addp4diffs
- added — Full support for [ccollab addversions](#) for all SCM systems, not just ClearCase
- added — (Eclipse Plug-in) Pre-submit file uploading for Subversion now supported
- added — Option to disable changelist roll-up (Case 31485)
- fixed — Hide/show changelists not working when multiple SCM's in the same review
- fixed — Subversion executable not found causing command-line to fail (Case 32520)
- fixed — Subversion directory-add and directory-delete was causing the command-line client to fail to upload files
- fixed — Subversion protocol on svn://localhost URL's is now supported properly
- fixed — Author chat is automatically marked "read" if he uploads a new file version (Case 32702)
- fixed — Reports failing to execute under Microsoft SQL Server for lack of proper identifier escaping
- fixed — Installer incorrectly configuring context.xml for internal-based user authentication when running against Microsoft SQL Server
- fixed — Diff-caching algorithm was showing correct but inconsistent line-diff metrics depending on the order the files were uploaded

- fixed — Context-sensitive help was not able to jump down to a sub-section of a single page of the manual
- fixed — Horizontal scrollbar in side-by-side view under IE 7 with "no-wrap" enabled was sometimes not long enough to view the entire line (Case 30481)
- fixed — If server starts up before the database, the server will never recover (Case 13626)

v2.0.601 — December 29, 2006

- added — new AJAX-based chat system really works like instant messaging (Case 24895)
- added — Microsoft SQL Server support (with migration path from MySQL)
- added — overall-review comment/defect chat area (Case 13622)
- added — server-side event-based trigger system for running custom scripts (Case 26886)
- added — link to download all review files to the local workstation (Case 24891)
- added — ability to cancel a review rather than deleting completely (Case 24892)
- added — ability to change participants while review is going on (Case 24894)
- added — database view for person-hours per review, user, and role
- added — command-line client options for overriding server URL, username, and password
- added — emails now include user's full name both in "to" and "from" fields (Case 23212)
- added — date/time of comments now displayed as a tool-tip (Case 10644)
- added — support for "local-mode" CVS servers (Case 25020)
- added — links to server/review debugging data from "System" screen
- added — user option for whether default side-by-side diff is "current vs. last upload" or "current vs. base version" (Case 25812)
- added — P4V/P4Win plug-in should list current reviews when attaching changelists to existing reviews (Case 28458)
- added — embedded database installer option for easy test servers (with migration path to MySQL or SQL Server)
- added — installer allows admin to set web server port number

- added — can create users with name and email address from the user administration page
- added — user administration page now shows which users logged in, inactive, disabled, and administrators
- added — deleted file content now viewable in side-by-side
- added — for SCM systems without atomic changelists, consolidate all changelists into a single list view
- added — for SCM systems without atomic changelists, rework uploads include reverted files
- fixed — insertion/deletion markers cause confusion; tooltips added to explain (Case 30393)
- fixed — filename different depending on which browser attached the external file (Case 25329)
- fixed — "accept" markers are now cleared on files that have been newly uploaded (Case 20534)
- fixed — with review in inspection phase, one reviewer is done but others are not, no action item for the first reviewer (Case 25823)
- fixed — recent participant list included inactive users (Case 24141)
- fixed — user initials can be ambiguous (Case 24274)
- fixed — speed optimizations for very large reviews (Case 29003)

11.2.11 Version 1

v1.2.516 — November 2, 2006

- fixed — Perforce trigger option for specifying a profile directory.
- fixed — Improve Perforce integration and trigger verbose logging.
- fixed — Installer removing attributes from realm declaration.

v1.2.515 — October 26, 2006

- fixed — diff widget broken in Firefox 2.0 (Case 27312).
- fixed — not all files are rolled up into single changelist (Case 26821).
- fixed — preferences can fail to load client configuration (Case 27311).

v1.2.512 – October 23, 2006

- fixed — attach uploaded changelists from the web ui (Case 26811).
- fixed — consolidated changelist view does not show all files (Case 26821).
- fixed — content archiving administration screen "hangs" with very large data caches (Case 26228).

v1.2.510 – October 4, 2006

- fixed — Unable to mark conversations "read" when over 2000 comments present in the review (Case 25865).
- fixed — database connection leak.

v1.2.508 – September 15, 2006

- added — options to only allow participants to view reviews/review content. (Case 24501)
- fixed — space used to mark insertion point was confusing. (Case 24246)
- fixed — whitespace inserted/removed at end of line causes rendered code to differ from real code. (Case 24767)
- fixed — syntax highlighting sometimes dropped spaces. (Case 25040)

v1.2.507 – September 11, 2006

- added — automatically separates changed files from separate SCM systems
- added — administrative option to hide/show the option to display multiple changelists as a single "changelist"
- added — hide/show previous changes is sticky.
- fixed — clients were not honoring proxy settings taken from preferences
- fixed — increased maximum length of email message to 64k. (Case 24832)
- fixed — confusion of unique changelist ID's when using more than one Perforce server against a single Collaborator database
- fixed — when displaying changelists in "single" mode, balls up files from different SCM systems instead of making one package for each SCM system

v1.2.506 — August 24, 2006

- fixed — Changing mark reviews as fixed workflow setting had no effect.

v1.2.505 — August 23, 2006

- fixed — Perforce changelists picking up wrong predecessor version (Case 24157).

v1.2.504 — August 22, 2006

- added — Verbose logging for Perforce integration.
- added — Support for Subversion username/password supplied on command-line. (Case 24124)
- fixed — Downloading binary files in Internet Explorer broken. (Case 23671)
- fixed — Client installer failed to authenticate when changing server and user password. (Case 23535)
- fixed — Removed unnecessary AJP connector from server.xml file due to small known memory leak. (Case 23736)

v1.2.503 — August 16, 2006

- fixed — More graceful handling of license server errors using cached license codes.
- fixed — Include documentation of how to configure non-proxied hosts.
- fixed — Increased number of characters allowed in certain meta-data fields.

v1.2.502 — August 8, 2006

- added — URL's, email addresses, and issue ID's are now hyper-linked when displaying custom review/defect fields
- fixed — uploading local changes from CVS or ClearCase could pick up the wrong previous version
- fixed — Diff highlight expansion caused code to be not printed. (Case 23379)

v1.2.501 — August 1, 2006

- fixed — Database error causes trigger to fail.

v1.2.500 — July 28, 2006

- added — Administration screen for archiving old review contents.
- added — Option to add/remove/edit review and defect custom fields.
- added — Reviewers have the option of annotating the review materials before the review begins.
- added — Option to change notification email subject prefix
- added — Quick links on review creation wizard to add the current user to a review
- added — clients pick up default global configuration from \$HOME/.smartbear and \$CWD/.smartbear, and do not create a .smartbear directory until preferences are actually saved.
- added — Perforce configuration value of "[none]" instructs the command-line utility to ignore the value completely
- added — ability to upload arbitrary diffs from CVS server
- added — line numbers in defect log
- added — selecting diff preferences causes immediate page refresh; do not have to click "Submit"
- added — file names now bold in changelist summary display
- added — option to show multiple changelists as a single unit
- added — user configurable email notification levels
- added — optional "create new user" form on login page
- added — three database views holding custom fields for reviews and defects, and extra user preference data
- fixed — First leading space is not displayed in side-by-side view (Case 10032)
- fixed — Normalize CVS paths from command-line and Windows client uploads (Case 11009)
- fixed — Status icons on review summary should link to the file (Case 10742)

- fixed — Accepted status cleared for newly uploaded versions (Case 10111)
- fixed — Chat notification icons do not update until side-by-side reloads
- fixed — Chat notification icons do not display when displaying single files
- fixed — Version selection and headings scroll off screen in side-by-side (Case 11213)
- fixed — Perforce GUI plug-in allows empty changelists to be uploaded to new reviews
- fixed — Only administrators should be allowed to change user logins (Case 8270)
- fixed — Complete line changes should be displayed as a delete followed by an add (Cases 10913, 10915)
- fixed — Review List report links linked to the wrong location (Case 11832)
- fixed — Word, Excel, and PDF documents show up as garbled text in side-by-side.
- fixed — Metrics by Review report failed to report defects per person-hour on small sample sizes.
- fixed — Metrics by Defect Type report failed to report opened per person-hour on small sample sizes.
- fixed — Next/Prev change buttons are disabled when there are no next/prev diffs.
- fixed — Clicking line of code jumps chat to correct area (Case 13280)
- fixed — Support filenames with adddiffs option (Case 13528, 14949, 16619)
- fixed — Diffs too greedy (Case 14152)
- fixed — No content uploaded for uncontrolled files (Case 14959)
- fixed — Perforce trigger has more explicit error messages when rejecting checkins. (Case 18398)
- fixed — Administrators always need access to review creation wizard. (Case 18399)
- fixed — Exported reports fail to open directly in Internet Explorer. (Case 13524)

v1.1.442 — July 17, 2006

- fixed — Perforce trigger option for ignoring integration changelists (Case 14745).
- fixed — Perforce trigger added --verbose option for verbose logging (Case 16732).

- fixed — Perforce trigger sometimes compares wrong content (ensurecontentreviewed) (Case 16696).
- fixed — Perforce GUI integrations now include --verbose option for verbose logging.
- fixed — Perforce integration runs out of ports when large changelist present.
- added — Support bug system hyperlink in review Title
- fixed — Administrator account password update failed (Case 18606).

v1.1.436 — May 22, 2006

- fixed — XML-RPC encoding broken on z/OS (Case 9367).
- fixed — NPE executing Clearcase cleartool (or any command line client executable) on Linux (Case 12781)

v1.1.435 — May 17, 2006

- fixed — Perforce trigger should not run as submitting user (Case 13161).

v1.1.433 — May 11, 2006

- fixed — Perforce usernames should not be considered case-sensitive.
- fixed — When using LDAP authentication, clients could not log in.
- fixed — Perforce trigger ensure content reviewed incorrectly rejects very large files.
- fixed — P4V/P4Win integration picks up environment variable for P4CLIENT.
- fixed — P4V/P4Win integration does not reject invalid changelists when creating new review.

v1.1.429 — May 1, 2006

- fixed — Improve Perforce trigger error messages.

v1.1.428 — April 26, 2006

- fixed — Perforce trigger ensure content reviewed misses additions/deletions from end of file (Case 11304).

v1.1.427 — April 25, 2006

- fixed — Clear Case command line should only gather files from current view (Case 11799).

v1.1.426 — April 21, 2006

- fixed — System administrator account lost administrator privileges under LDAP authentication (Case 11468).
- fixed — Command-line client not parsing Unix paths -- Clear Case integration (Case 11501).

v1.1.425 — April 20, 2006

- fixed — Restored legacy ReviewList report.

v1.1.424 — April 10, 2006

- fixed — Command line picked up wrong predecessor version when using ClearCase SCM (Cases 9040, 10738).
- fixed — Entering license code fails to update license.
- fixed — Client unable to locate cleartool on Windows.
- fixed — Reports not working on some headless Unix servers.

v1.1.423 — April 5, 2006

- fixed — unattended installations preserve all configuration information.
- fixed — notifications include product name.
- changed — enabled unattended installations.

v1.1.422 — April 4, 2006

- changed — disabled unattended installations until issues can be resolved.

v1.1.421 — April 3, 2006

- fixed — author comments and trivial reviewer activity (for example, accepting) were triggering erroneous emails to the author to come into the review
- fixed — when multiple already-submitted Perforce changelists with common files were added to a single review, the older ones were being hidden in "Previous Uploads" when they should be displayed along with the rest.
- fixed — user passwords no longer stored in the clear
- fixed — deleting defect severities or types causes UI glitches when old defects are displayed (Case 10268)
- fixed — side-by-side font wrong in some places (Case 10607)
- fixed — participants are not notified or re-invited to reviews when the author uploads a new set of changelists
- fixed — side-by-side windows should have the filename in their title
- added — support for stronger Perforce commit-trigger that checks whether the file list and file contents match between changelist and the review to make sure the developer did not change anything between review-time and commit-time.
- added — user option for disabling syntax coloring in side-by-side view for faster content downloads
- added — option to create new review from command line client when running 'addchanges' or 'addchangelist'
- added — ability to diff previous file uploads in side-by-side view even when those uploads belong to different, discontinuous, already-committed changelists
- added — fixed defects are now indicated with a "green bug" to distinguish from still-open defects in the Review Overview screen
- added — in Review Overview screen, defects are now shown in the column of the user that first reported it rather than in a separate column
- added — added audit messages when a defect is marked fixed or open
- added — verbose option for command line clients to create debug logs
- added — more specific error message when attempting to upload an empty Perforce changelist

- added — display entire file path in defect log when the defect is linked to a particular file
- added — defect icon tooltips should include defect ID's for quick-reference
- added — command line clients prompt for password if not specified on command line so password is not in command history
- added — command line 'adddiffs' subcommand for reviewing differences between two locally accessible directories
- added — command line quiet option to suppress opening the text editor to edit file list
- added — cache control headers to allow caching of images, stylesheets, and JavaScript.

v1.0.410 — March 20, 2006

- fixed — cannot close review with multiple reviewers when defects are entered directly into the defect log (Case 10116)
- fixed — proper error message inside P4V on changelists when uploading changelists that are not part of the current workspace
- fixed — Javascript error loading Defect Severities or Defect Types page

v1.0.409 — March 16, 2006

- fixed — `collab syncusers` was failing when the Perforce user login differed from the Collaborator login only by case

v1.0.408 — March 14, 2006

- fixed — notifications were no longer prefixed with Collaborator

v1.0.407 — March 14, 2006

- fixed — incompatibility with some versions of MySQL
- fixed — duplicate user logins possible when changing user login
- fixed — email notifications stop being sent after some time

v1.0.406 — March 9, 2006

- fixed — memory leak with GUI client connections
- fixed — installer not setting VM heap size
- fixed — Case 9744 - NullPointerException in P4Win/P4V integration
- fixed — Case 9710 - All action items were showing urgent icon
- added — additional logging in database code
- added — System Dump includes more VM information

v1.0.402— March 2, 2006

- fixed — logout broken for some versions of Internet Explorer
- fixed — some clients unable to login
- fixed — logging now enabled by default at INFO level

v1.0.400 — February 28, 2006

- added — chat conversations are now marked as "has chatted" and/or "as opened defect" and/or "has accepted" rather than the "undecided" and other confusing concepts
- added — new reporting subsystem with additional filters and export options
- added — added option to show "only uploaded version" even when other diffs are available
- added — better support for binary file uploads
- added — ability to make a user "inactive" (you can never delete users because they are needed for reports and to display old reviews)
- added — Action Items list now more specific about the exact state of the review as it relates to the viewing user
- added — e-mail notifications now more specific about the exact state of the review as it relates to the viewing user
- added — ability to jump from a defect in the review summary defect log directly into that point in the latest source code upload
- added — support for local temporary license code if the network is unavailable for on-line licensing

- added — new customer-accessible Java library to read/write everything in the Collaborator server remotely
- fixed — cannot "Complete Review" when there are unread comments on previously-uploaded changelists that have already been marked read in the currently-uploaded changelists
- fixed — when chat is carried forward from older uploads, chat icons on review summary are not being displayed
- fixed — cvs rlog command reports error with certain versions of the CVS client
- fixed — cannot delete a review when database is in a certain rare state
- fixed — "out of memory" errors for certain operations
- fixed — database connection leak with certain types of authentication
- fixed — correct diff but erroneous intra-line highlighting when unchanged text is symmetrical on either side of change
- fixed — selection highlighter highlights wrong line of code when window is narrow

v1.0.361 — February 9, 2006

- added — (Case 8439) support for more types of CVS repository specifications.

v1.0.360 — February 8, 2006

- added — (Case 8941) support for trial license codes which do not contact license server.

v1.0.359 — January 27, 2006

- added — (Case 8486) when licensing server cannot be reached, retry on backup port.

v1.0.358 — January 24, 2006

- added — (Case 8486) support for HTTP proxy authentication when validating license codes.

v1.0.357 — January 20, 2006

- added — (Case 8420) command line client support for uploading Subversion revisions.

- fixed — (Case 8439) in certain cases, command line client was failing to upload CVS changes.

v1.0.356 — January 9, 2006

- fixed — (Case 8319) some client upgrades failing with authentication issues
- fixed — (Case 8344) improved error message when server failed to contact license server.

v1.0.355 — January 3, 2006

- fixed — clients were not properly authenticating when using LDAP

v1.0.354 — December 29, 2005

- added — option to allow system administrator to participate in reviews
- fixed — (Case 7560) unable to upload files after clean install with old database.
- fixed — LDAP role fields were confusing and not required for basic LDAP support.

v1.0.353 — December 21, 2005

- added — progress indicator for when loading file contents in file viewer
- fixed — (Case 7530) server failed to get user initials in some cases

v1.0.352 — December 19, 2005

- fixed — (Case 7501) Stale cookies were causing issues with login/logout.

v1.0.351 — December 12, 2005

- added — (Case 6640) previously-uploaded changelists are now hidden by default to avoid confusion when verifying fixes
- added — (Case 6812) link to leap from defect into associated file/line
- added — (Case 6871) support more than one file open at a time, bringing forward side-by-side window if already open

- added — (Case 6824) automatically hyperlink URL's and e-mails in changelist comments, chat comments, defect text, and review overviews
- added — quick-report of recent changelists and unreviewed changelists when attaching materials to a review
- added — application level log system
- added — support for LDAP authentication
- added — new installer prompts for key system parameters; server configuration split between server.xml and context.xml
- fixed — (Case 7226) code displayed in word-wrapped mode now does not have extraneous whitespace inserting into long tokens
- fixed — (Case 6932) not able to upload any changelist if Perforce default changelist was not empty
- fixed — (Case 6949) downloaded reports were not sending a filename
- fixed — added special error message when uploading a pending Perforce changelist that belongs to the current P4USER but to a different P4CLIENT
- fixed — added java.library.path to the local application scan directory for systems without environment variables
- fixed — uploading additional Perforce changelist did not update the time-of-upload; was taking the time-in-changelist instead
- fixed — uploading older Perforce changelist was sometimes destroying metrics data for previous file versions
- fixed — not able to upload submitted Perforce changelists from the command-line when P4CLIENT environment variable is changed
- fixed — after following a link but not being authenticated, after authentication you go to the home page instead of the linked page

v1.0.349 — October 25, 2005

- added — (Case 6595,6804) side-by-side difference viewer needs "ignore whitespace" and "ignore capitalization" options
- added — support for client-side HTTP proxies
- added — link to download server logs in "System" debugging page

- fixed — (Case 6780) Perforce server-side trigger should ignore changelists consisting of branched paths only for purposes of both review and automatic uploading
- fixed — (Case 6814) error installing client under Windows when user-level PATH variable does not already exist

v1.0.347 — October 14, 2005

- added — "mark all comments read" quick-button in side-by-side view; administrators can disable this feature
- fixed — unable to "mark read" on new chat if already marked read in the same chat session
- fixed — issue regular expression was case-sensitive

v1.0.346 — October 10, 2005

- added — new Action Item when e-mail or full name not currently set for a user
- added — prompt to download local client software from the server
- added — administrative contact information is now required

v1.0.345 — October 3, 2005

- added — (Case 6664) ability to view files/metrics for uploaded changelists in "Attach Materials" section of the New Review Wizard
- added — (Case 6652) Action Items with no "new" comments should be marked as such on the "Action Items" list, and should be low priority
- added — (Case 6666) refresh button for chat window
- fixed — (Case 6635) URL's in e-mails give error when opened under Eudora
- fixed — (Case 6661,6643) JavaScript error with next/previous buttons in side-by-side view
- fixed — entering non-digits in the "jump to review" menubar field results in strange error message
- fixed — file paths with backslashes not word-wrapping on Review Overview screen

11.2.12 Version 0/Alpha

v0.9.344 – September 26, 2005

- added — initial support for ClearCase
- added — initial support for the Windows GUI Client
- fixed — (Case 6621) "add defect" comment field still limited to 255 characters in form on Review Overview page
- fixed — (Case 6475) "edit defect" command should update GUI widgets to indicate "edit" rather than "create"

v0.9.343 – September 21, 2005

- added — command-line support for uploading CVS changes by label
- fixed — (Case 6593) error uploading Perforce files: "unrecognized chunk"
- fixed — (Case 6540) bogus date in user admin screen for users who have never logged in
- fixed — (Case 6475) "edit defect" should have different form text than "create defect".

v0.9.342 – September 15, 2005

- fixed — (Case 6544) script error viewing diffs in certain files, or when file content is not yet fully loaded
- fixed — action items for "waiting for comments" should appear after "respond to comments" because they are lower priority
- fixed — syntax highlighting split by intra-line difference causes incorrect colors in both difference and syntax display

v0.9.341 – September 14, 2005

- added — (Case 6471) external base server URL (used with e-mail notifications) is now configurable by the administrator
- added — (Case 6408) participant-picker needs recently-used list to speed up the assignment process
- fixed — (Case 6508) 255 char limit in overview

- fixed — (Case 6529) error attempting to send email with a certain JVM
- fixed — (Case 6534,6538) typing comment then clicking "Accept" causes comment to be lost
- fixed — (Case 6522) ccollab addchanges cannot handle relative paths

v0.9.339 — September 9, 2005

- added — (Case 6267) workflow revamp: faster to "accept," concepts of "reject" and "defect" have been fused, no more accept/unsure/reject determination for commentary, comments carry forward to code verification step, defects shown in side-by-side next to comments for editing and marking fixed
- added — (Case 6372) large text fields should expand as more text is entered into them
- added — (Case 6406) administrative option to set system-wide tab width for source file display
- fixed — (Case 6406) tabs not being displayed properly in side-by-side view
- fixed — (Case 6355) should not be allowed to add a changelist to a review that is completed or that you are not a participant in or a creator of
- fixed — (Case 6265) comment text should not be limited to 255 characters
- fixed — (Case 6382) client error message not helpful when incorrect server/port is specified, especially when a real service is present
- fixed — (Case 6354) clicking on a specific command-line does not open the file to that line

v0.6.337 — August 24, 2005

- fixed — (Case 6275,6279,6281) database errors accessing user data
- fixed — (Case 5624) error not able to locate content-cache subdirectories on the server

v0.6.336 — August 23, 2005

- added — initial support for CVS integration
- added — (Case 5628) user-preference to set number of lines of context displayed in side-by-side view
- fixed — error accessing reviews when review meta-data is missing from the database

- fixed — (Case 6252) exception adding comments to the comment-list

v0.6.335 — August 19, 2005

- added — (Case 5551) launch browser window after P4Win plug-in attaches changelist
- fixed — (Case 5528) error uploading large file
- fixed — (Case 5615) incorrect LOC-changed metrics for file uploads
- fixed — (Case 5617) extra whitespace in side-by-side view of code when tabs are used in a certain way
- fixed — (Case 5618) file download should supply filename to the browser for better open/save handling on the browser end

v0.6.334 — August 18, 2005

- added — (Case 5553) ability to alter review overview information during any phase of the review (without reverting back to "Planning" mode)
- added — (Case 5612) reviews that just entered the Inspection phase (either because just created or because fixes are being verified) should be displayed as "Waiting for comments" on the author side until a comment is actually made; the author should be notified by e-mail when this comment is made.
- fixed — not properly HTML-escaping certain characters in review titles
- fixed — (Case 5600) not always receiving e-mails as review in a new code review or when fixes have been uploaded
- fixed — (Case 5613) exception when accessing admin screen when upgrading from a certain database version

v0.6.332 — August 17, 2005

- added — (Case 5590) ability to download file versions directly from the side-by-side view
- added — (Case 5576) optional feature to send e-mails from the review creator's e-mail address rather than the system default from address
- added — (Case 5387) gutter icons in side-by-side show which lines have associated chat comments
- fixed — (Case 5528) error uploading large file

- fixed — (Case 5577) uploaded "previous version" is actually the HEAD revision instead of the last-synched revision
- fixed — (Case 5584) erroneous error message while uploading files from a Perforce branch
- fixed — (Case 5386) skip-lines algorithm in side-by-side view should treat chat comments as significant lines, not just changes.
- fixed — (Case 5597,5598) incorrectly-encoded SGML character entities when intra-line diff splits on an encoded character

v0.6.331 — August 14, 2005

- added — user preference for flipping the side-by-side view to older-on-right instead of the default older-on-left
- added — (Case 4388, 5279, 5424) ability to compare follow-up change against other uploaded changes in addition to the original SCM base version
- added — (Case 5335) participant input list in Review Creation Wizard automatically adds additional rows for large number of participants
- added — (Case 5544) better e-mail headers including easily-filterable text and the name and ID of the related review
- added — (Case 5468) drill-down from Review List report to actual review view
- added — (Case 5426) new report: Review List with Perforce Changelists
- added — (Case 5567) option to disable "issued fixed" throughout the application
- fixed — (Case 5550) lines with trailing whitespace are showing up with false-positive differences
- fixed — (Case 5484) errors on changelist-upload when no bug system regular expression is given by the administrator
- fixed — (Case 5515) new defects opened on completed reviews should change the review phase to Phase II: Review
- fixed — (Case 5557) erroneous exception when uploading file data under a special condition

v0.6.330 — August 10, 2005

- added — global configuration options to ease per-user installation
- fixed — PATH variable not being set as environment-expand registry value under Windows

- fixed — (Case 5478,5482) uploading certain Perforce changelists takes exceedingly long time
- fixed — (Case 5481, 5516, ...) erroneous ccollab error requiring review-id and changelist-id when files are in the default changelist
- fixed — (Case 5524) better error messages when configuration files are not accessible
- fixed — (Case 5508, 5525) better error message when `http://` is missing from collaborator server specification

v0.6.327 — August 8, 2005

- added — (Case 5426) ability to jump to review by ID from the menubar
- added — (Case 5471) command-line should pick up Perforce configuration from environment variables
- fixed — (Case 5453, 5454) exception working with changelist from uploaded file
- fixed — (Case 5460) exception viewing certain review detail reports
- fixed — (Case 5476) javascript error auto-refreshing review page under certain IE version
- fixed — (Case 5479) word-wrapping is breaking inside SGML character entities on side-by-side source code view

v0.6.325 — August 7, 2005

- Case 5428 — added — support for PHP-style review logging data for older upgrade paths
- Case xxxx — added — report data can now be retrieved from the command-line in any format, with optional filters
- Case xxxx — fixed — PHP-upgrade path fixes

v0.6.323 — August 5, 2005

- Case 5366 — added — now collecting time-spent-in-review metrics per user, per role, per review, per phase, per defect count/type/severity
- Case xxxx — added — report data can now be exported in XML or CSV format
- Case xxxx — added — report data can now be retrieved from the command-line in any format, with optional filters

- Case 5393 — fixed — administrator should not be allowed to change login name
- Case 5393 — fixed — user preference title has wrong username in title when administrator edits other users' information

v0.6.322 — August 1, 2005

- Case 5381 — added — configurable review participant role behavior to support different workflows
- Case xxxx — added — ability to delete reviews when they are still in planning phase

v0.6.321 — July 29, 2005

- Case 5278 — added — P4Win/P4V integration for creating a new review using a changelist
- Case xxxx — added — client installer now picks up Perforce configuration automatically (can still be overridden from the command-line)
- Case xxxx — added — client installer now prompts for and verifies server connectivity settings (can still be overridden from the command-line)
- Case xxxx — added — new "Licensing" administration page
- Case xxxx — added — administrative settings: minimum allowable build numbers for command-line and windows clients to force users to upgrade

v0.6.320 — July 26, 2005

- Case 5278 — added — P4Win/P4V integration for uploading changelist data and associating it with an existing review
- Case 5342 — fixed — cannot switch participant roles in Review Planning
- Case 5344 — fixed — new review created; next/prev buttons work but links on the wizard pages list on left do not work
- Case 5345 — added — server system parameters on the System debugging link
- Case xxxx — fixed — spurious error when uploading already-committed changelists when the changelist has already been uploaded

v0.6.319 — July 25, 2005

- Case xxxx — fixed — error sending e-mails with older Java mailer
- Case xxxx — fixed — associating changelist with review not properly encoding certain string before inserting into database
- Case xxxx — fixed — error-handling, validation, and help text for bug-tracking integration items
- Case xxxx — added — synchronizing Perforce userlist with Collaborator from the command-line

v0.6.317 — July 25, 2005

- Case 5041 — added — uses value of REMOTE_USER for automatic log-in when password is blank
- Case xxxx — fixed — error accessing new user preference item

v0.6.316 — July 21, 2005

- Case 4614 — fixed — new wizard prompts user better about pre-checkin changes
- Case xxxx — fixed — error where "mark as read" while also changing comment status does not get reflected on review summary page
- Case 5280 — added — user preferences for side-by-side word-wrapping, and font family and size
- Case xxxx — added — many more Web Service API's

v0.6.314 — July 15, 2005

MAJOR UPGRADE! This new alpha release sees the unveiling of the new Collaborator platform. We have switched from our proof-of-concept PHP platform to an industrial-strength Java platform with greatly enhanced scalability, support for multiple databases, and an improved, simplified workflow.

v0.4.215 — June 14, 2005

- Case 4614 — fixed — new wizard prompts user better about pre-checkin changes
- Case 4607 — added — test PHP configuration at install-time

- Case ??? — added — optimizations for database communication cutting page-load time in half

v0.4.213 — June 01, 2005

- Case 4562 — fixed — resizing window causes JavaScript error (IE only)
- Case 4564 — fixed — maximizing window causes JavaScript error (IE only)
- Case 4567 — fixed — scroll position is no longer remembered on screen refresh (IE only)
- Case 4563 — fixed — word-wrap still wraps sometimes (IE only)

v0.4.212 — May 30, 2005

- Case ??? — fixed — all HTML and CSS now validated HTML 4.0.1-Transitional
- Case 4144 — fixed — focus change in accept/reject/undecided combo-box does not move selection rectangle
- Case 4126 — fixed — user's file-diff preferences not persisted (that is, lines of context, ignoring case)
- Case ??? — fixed — line-selection rectangle obscures underscore characters in certain browsers
- Case ??? — fixed — word-wrapping algorithm in file-diff too pessimistic, especially under IE
- Case ??? — fixed — tightened up intra-line difference highlighting
- Case ??? — added — optional new line-comparison frame makes it easier to compare long lines
- Case 4126 — added — option to disable word-wrapping in file-diff file content
- Case 4126 — added — buttons to advance to the next/previous change
- Case 3300 — added — review-create phase is now a "wizard"
- Case 3644 — added — on-line licensing system
- Case 4316 — added — new report on number of comments made per review / per user
- Case ??? — added — ability to review whole files and file-differences uploaded independantly from version control

v0.4.211 — April 21, 2005

- Case 3858 — fixed — sometimes vertical scrollbar not appearing in file-diff view
- Case 3858 — added — side-by-side divider between chat and file content is now move-able so you can easily "hide" comments while reading a file
- Case 3949 — added — ability to jump to a particular review by ID from the menubar

v0.4.210 — April 20, 2005

- Case 3929 — fixed — disallow running the command-line client against the Code Collab demo server (the default configuration)
- Case 3930 — fixed — javascript error when planning a review and the review is not yet ready to proceed to the next stage
- Case 3920 — added — ability to delete changelist associations from reviews
- Case ??? — added — "revert" button on various forms

v0.4.209 — April 19, 2005

- Case 3905 — fixed — pending changelists should not be available for adding from the website
- Case 3677 — added — "Save" buttons on forms remember scroll position for easier data-entry on long pages
- Case 3721 — added — administrative usage monitor available from bottom of admin "User" page
- Case 3838 — added — ability to set minimum build number for the command-line client from the Collab server admin settings page
- Case 3842 — added — issues mentioned in changelists should be associated with the review automatically
- Case ??? — added — reports can now "group by" certain things (see "Assignments" and "Reviews" for examples)

v0.4.208 — April 12, 2005

- Case 3687 — fixed — files in "add" state in Perforce changelist not being picked up by the command-line client

- Case 3563 — added — user administration page: add users manually; view info and usage; admins can set "admin" flag and other user preference information for other users
- Case 3702 — added — customization administration page: change text for defect severities, defect types, and phase titles and prompts
- Case 3694 — added — "Remember Me" should redirect the login page to the user's review home page.
- Case 3697 — added — report enhancements: review-created date on report and summary page; complete user comment table on review summary page
- Case 2623 — added — "Preview Changes" on changelist during Review Planning phase
- Case 3664 — added — margin icon for comments is now a pencil instead of a meaningless arrow
- Case 3681 — added — help documentation on the purpose and behavior of user roles
- Case 3699 — added — phase prompt bullets are hidden when tutorial mode is disabled

v0.4.207 — April 11, 2005

- Case 3617 — fixed — local changes not showing up in side-by-side view
- Case 3606 — added — review phase data to getReports(), so scripts can check for review-completion, not just review-existence
- Case 3614 — added — "Action Items" list on the home page; daily e-mail action items reminder (if any are present)
- Case 3616 — fixed — observers should not prevent a review from proceeding to the next phase
- Case 3645 — added — removed "controller" role
- Case 3618 — added — ability to move from Phase II back to Phase I
- Case 3622 — fixed — prevent moving from "Planning" to "Reviewing" when there are unsaved changes to the Participant List
- Case 3623 — added — support "Remember Me" log-in option to make logging in easier
- Case 3660 — added — adding changelist to the review should automatically add the changelist author to the review in the "Author" role unless that user is already added in a different capacity

- Case 3662 — fixed — commenting on new line of code with "Accept" without additional commentary did not work
- Case 3665 — fixed — inconsistent wording: "neutral" vs "undecided"
- Case 3666 — fixed — review in Phase II should show comments from all participants, not "consensus". Cannot really show "undecided" or "unreviewed," only what comments are made
- Case 3676 — added — usernames always get initials; smarter algorithm for pulling out initials automatically

v0.4.206 — April 8, 2005

- Case 3471 — added — all users imported from Perforce, not just those in recent version history

v0.4.205 — April 8, 2005

- Case 3606 — added — ability to call arbitrary RPC methods from the command-line
- Case ??? — added — help documentation on XML/HTTP/RPC integration points

v0.4.203 — April 5, 2005

- Case 3557 — fixed — author needs notification when review enters "Rework" or "Completed" phase
- Case 3558 — fixed — should not be able to close a review when "new" comments are pending
- Case 3559 — fixed — creating new users from the front page results in accounts that cannot be logged in to
- Case 3560 — fixed — install should check for writable /file-cache directory; instructions should say to check this also

v0.4.202 — March 29, 2005

- Case 3474 — fixed — error message when incorrect file data is shown
- Case 3485 — fixed — add-defect form had incorrect maximum limit on number of lines in the file

- Case 3486 — fixed — Perforce not loading previous file versions (reload version control data using "Clear Version Control Data" link in install.php)
- Case 3470 — added — can now delete existing review from the bottom of the "Review Summary" tab
- Case 3472 — added — passwords in database are now encrypted

v0.4.201 — March 28, 2005

- Case ??? — fixed — not compatible with MySQL v3.23

v0.4.198 — March 24, 2005

- Case 3316 — fixed — ccollab synchscm documentation is confusing
- Case 3396 — fixed — deletions not handled properly in Perforce
- Case 3317 — added — option to disable "create new user" from front page
- Case 3367 — added — debugging support in server and command-line utility
- Case 3369 — added — added support for content-compression for browsers that support it

v0.4.186

First alpha release

11.3 Appendix C: Java VM Options

Files That Store Java Virtual Machine Options

You can find the options for the Java Virtual Machine in the `.vmoptions` files that are located in Collaborator's install directory. The file name corresponds to the name of the appropriate executable file.

For **server** the path will be: `<collab server install dir>/ccollab-server.
vmoptions`

For **command-line client** the path will be: `<collab client install dir>/ccollab.
vmoptions`

For **GUI client** the path will be: `<collab client install dir>/ccollabgui.
vmoptions`

Note: You must restart the Collaborator server or client before these settings take effect.

This topic describes some of the most frequently used options.

File Format

To specify Java system properties that will be available to Collaborator, use this syntax:

```
-Dvariable_name=value
```

Important: the last line in the `.vmoptions` files must be empty, that is, you must enter a new line after the last line with data.

Collaborator Server Properties

Property Name	Purpose and Usage
<code>com.smartbear.ccollab.binary.converter.threads</code>	The maximum number of threads allocated to convert binary documents into images for review. This value must be a positive integer. Default is 4.
<code>com.smartbear.ccollab.license.noperiodicupdate</code>	If set to a non-blank value, this property prevents the Collaborator server from checking for license updates.
<code>com.smartbear.ccollab.datamodel.drift.disable</code>	A Boolean setting (values: true/false) to disable in-product chat ^[23] for trial users.
<code>com.smartbear.ccollab.notification.max.retry.interval</code>	The number of milliseconds to wait between attempts to connect to the SMTP server.
<code>com.smartbear.server.email.max.num.per.execution</code>	The maximum number of e-mails sent during a single check up for stalled reviews and reviews approaching deadline. Default is 100.
<code>com.smartbear.server.sso.disable</code>	A Boolean setting (values: true/false) to disable SAML or Crowd single sign-on authentication ^[124] .
<code>com.smartbear.server.disable.comments</code>	A Boolean setting (values: true/false) to disable comments in review materials. If enabled, only defects can be added. Default is false.

Property Name	Purpose and Usage
com.smartbear.database. longquerythreshold	The time in milliseconds to allow database queries to run before logging a warning message. This is used to help debug bottlenecks and characterize the behavior of complex queries such as those used by the custom reports system. Default is 2000 milliseconds.
com.smartbear.collab. datamodel.remotesystem. cache.size	In order to decrease number of calls to repository hosting servers, Collaborator caches some of the most often retrieved entities from APIs (commits, pull request diffs, commit diffs). This setting specifies the number of entries to keep in cache for each of the remote systems. Default is 20000. To disable caching, set this option to 0.
com.smartbear.collab. datamodel.remotesystemitem. update.interval	The time in milliseconds to wait between updating remote system item statuses. For those remote systems which do not support webhooks. Default is 120000 milliseconds.
com.smartbear.collab. datamodel.remotesystem. issuemeta.update.interval	The time in milliseconds to wait for issue creation meta info from the remote issue-tracker. Default is 60000 milliseconds.
com.smartbear.collab. datamodel.remotesystem. bitbucketserver.api.delay	The time in milliseconds to wait between pull request update and a call to Bitbucket server API. Default is 5000 milliseconds.
com.smartbear.collab. datamodel.remotesystem. socket.timeout	Specifies the timeout (in milliseconds) of the remote system connection when updating remote system item statuses. Default is 3000 milliseconds.
com.smartbear.collab. database.search.review	<p>Specifies the preselected search scopes for reviews in the Oracle database. Can be empty (no preselected scopes), or can contain any combination of the following comma-separated values:</p> <ul style="list-style-type: none"> • id - Search for substring matches among review identifiers. • title - Search for substring matches among review titles.

Property Name	Purpose and Usage
	<ul style="list-style-type: none"> • creator - Search for substring matches among review creators. • reviewCustomFields - Search for substring matches in review custom fields. • checklistCustomFields - Search for substring matches in checklist custom fields. • participantCustomFields - Search for substring matches in participant custom fields.
<code>com.smartbear.collab. database.search.changelist</code>	<p>Specifies the preselected search scopes for changelists in the Oracle database. Can be empty (no preselected scopes), or can contain any combination of the following comma-separated values:</p> <ul style="list-style-type: none"> • comment - Search for substring matches in changelist comments. • author - Search for substring matches among changelist authors. • scmIdentifier - Search for substring matches among changelist identifiers.
<code>com.smartbear.collab. database.search.file</code>	<p>Specifies the preselected search scopes for files in the Oracle database. Can be empty (no preselected scopes), or can contain the fileName value to preselect a search scope for substring matches in filenames.</p>
<code>com.smartbear.collab. database.search.defect</code>	<p>Specifies the preselected search scopes for defects in the Oracle database. Can be empty (no preselected scopes), or can contain any combination of the following comma-separated values:</p> <ul style="list-style-type: none"> • text - Search for substring matches in defect descriptions. • customFields - Search for substring matches in defect custom fields.

Property Name	Purpose and Usage
com.smartbear.collab.database.search.comment	Specifies the preselected search scopes for comments in the Oracle database. Can be empty (no preselected scopes), or can contain the conversations value to preselect a search scope for substring matches in review comments.
com.smartbear.collab.enable_statistics	Specifies whether Collaborator server should collect and send usage statistics to SmartBear. To learn about our privacy policy, visit https://smartbear.com/privacy/ .
com.smartbear.diff.cache.maxentries.memory	The number of entries allowed in the diff cache. The size of any given entry can vary significantly, but this tuning parameter provides a rough mechanism for tuning the cache size. Default is 2000.
com.smartbear.diff.image.resolution.scale	<p>The resolution scale of converting PDF and Word documents into images displayed in DiffViewer. Default is 162.</p> <p>We do not recommend changing this option unless DiffViewer has troubles displaying small characters, diagrams or documents look blurry. In this case, to get clear images, you will need to increase the resolution scale, restart Collaborator server and clear browser cache.</p>
com.smartbear.lines.cache.size	The maximum size of the parse lines cache. Values should be a memory size in kilobytes or megabytes indicated by the case-insensitive suffixes "k" and "m" respectively. For example, 20 megabytes could be indicated by "20m" or "20M". Default value is 5 megabytes.
com.smartbear.web.debug.max.log.entries	The maximum number of entries in the client log file which is enabled by "CAPTURE DEBUGGING LOG". The default value is 160000 which results in a log file that is approximately 50MB.
smartbear.appstate.period	The delay, in milliseconds, between runs of the application state recorder. The state recorder periodically writes information about the state of the application into the database for future trend analysis. Default is 15 minutes.

Property Name	Purpose and Usage
<code>smartbear.appstate.startup.delay</code>	The delay, in milliseconds, before the application state recorder starts. Delaying the application state recorder allows the application initialization process to complete before anything is written to the database. Default is 5 minutes.
<code>smartbear.chat.request.limit</code>	The maximum number of chat update requests allowed per minute. This value will be used for active reviews and the clients and servers will automatically scale back the request rate as activity on the review declines.
<code>smartbear.news.disable</code>	A Boolean setting (values: true/false) to hide the Collaborator News panel in the WebUI.
<code>flash.enabled</code>	Specifies whether Web Clients will use Adobe Flash component to upload files. By default, the option is disabled and Web Clients use more secure HTML5 component for uploads.
<code>smartbear.internal.p4DisableAuthorCheck</code>	A Boolean setting (values: true/false) that specifies whether to disable author check-up of Perforce changelists. If set to true, users could upload changelists of other authors.
<code>smartbear.mail.smtp.connectiontimeout</code>	The timeout, in milliseconds, for SMTP connections. The value must be a positive integer.
<code>smartbear.mail.smtp.timeout</code>	The timeout, in milliseconds, for SMTP requests. The value must be a positive integer.
<code>smartbear.reports.ignore.accepted.comments</code>	A Boolean setting (values: true/false) to indicate whether or not accepted comments should be ignored in the reporting of review statistics in the Review Detailed Report.
<code>smartbear.trigger.timeout.seconds</code>	Applies to the triggers on the Admin Triggers ¹⁹⁶ page. Specifies the maximum allowable time for the trigger execution in seconds. If the execution time exceeds this value, Collaborator stops the trigger and logs an exception. 0 means there is no limit set.
<code>smartbear.userauth.class</code>	Specifies the authentication adapter used to authenticate users. Do not set this property unless directed by SmartBear technical support.

Property Name	Purpose and Usage
com.smartbear.review.workflow.phase.rework.notification	Specifies if the reviewers in "waiting" state will receive notifications of other participant/author activity during the Rework phase. If this option is not specified or is true, reviewers will get notifications, otherwise they will not.
com.smartbear.reviewpools.lock.regex	Prevents review pools from being deleted. If a review pool group name matches the specified regular expression, this group cannot be deleted.
com.smartbear.reviewpools.lock.allowrolechange	<p>A Boolean setting to allow the roles of the locked review pools to be changed by anyone.</p> <p>This setting has effect only if the com.smartbear.reviewpools.lock.regex setting is specified.</p>
com.smartbear.reviewpools.lock.rolesallowedtomodify	<p>A comma separated list of system role names that are allowed to modify locked review pools and their roles. Administrators are always allowed to modify the locked review pools and their roles.</p> <p>This setting has effect only if the com.smartbear.reviewpools.lock.regex setting is specified.</p>
javax.net.ssl.trustStore	<p>A generic Java machine option that specifies the location of the Java keystore file containing the collection of CA certificates trusted by this application process (trust store).</p> <p>For example: -Djavax.net.ssl.trustStore=\${ProgramFiles(x86)}\collaborator server\tomcat\conf\collab.ks</p> <p>This option is NOT recommended. To set trust store location for Collaborator tomcat server it is better to use truststoreFile attribute the <u>Connector</u> element of the <Collaborator Server>\tomcat\conf\server.xml configuration file.</p>

Property Name	Purpose and Usage
com.smartbear.code.metrics.style	Specifies whether to include comments and whitespaces when calculating line of code (LOC) metrics. If set to SLOC, comments and whitespaces will be ignored in metric calculations.
com.smartbear.collab.datamodel.manager.chunk.for.32.jdk	If set to a non-blank value, this property indicates that Collaborator server is running on 32-bit Java virtual machine. This indication is needed for accurate creation of dump file .
com.smartbear.collab.datamodel.remotesystem.webhooks.ssl.enable	<p>A Boolean setting (values: true/false) that specifies whether webhooks created by the Easy Add Repository would have SSL verification enabled or disabled.</p> <p>By default, SSL verification of webhooks is disabled to avoid handshake issues on Collaborator servers with self-signed or untrusted certificate authority (CA) root certificates.</p>
com.smartbear.web.diffviewer.zoom.scale.min	Specifies the minimal zoom level (in percentage) of images, Word and PDF files displayed in Diff Viewer. Default is 10.
com.smartbear.web.diffviewer.zoom.scale.max	Specifies the maximal zoom level (in percentage) of images, Word and PDF files displayed in Diff Viewer. Default is 500.
com.smartbear.web.diffviewer.zoom.scale.increments	Specifies the increment of zoom level (in percentage) of images, Word and PDF files displayed in Diff Viewer. Default is 10.
com.smartbear.database.disable_oracle_regexp_like	<p>A Boolean setting (values: true/false) that specifies which predicate (REGEXP_LIKE or LIKE) Collaborator will use to query the data from Oracle database.</p> <p>By default, when this option is not specified or when the option is set to false, Collaborator uses REGEXP_LIKE predicate in queries.</p>

Property Name	Purpose and Usage
	When the option is set to true, Collaborator will use a faster LIKE predicate in queries. We recommend to use this option if you encounter performance issues on Oracle database.

Client Properties

The following properties are specific to Collaborator clients:

Property Name	Purpose and Usage
<code>smartbear.collab.upload.truncate.size</code>	<p>The size, in bytes, to truncate uploaded files in the changelist. This threshold prevents clients from inadvertently overloading the server with files too large to process. The minimum threshold value is 4MB.</p> <p>If any of your clients uses this option, avoid using the <code>ensure-diffs-reviewed</code> and <code>ensure-content-reviewed</code>^[706] triggers. In this case, these two triggers will compare only the remaining parts of the truncated files. Consider using the <code>ensure-reviewed</code> trigger instead.</p>
<code>smartbear.collab.upload.ignore.binary.file</code>	A Boolean setting (values: true/false) to indicate whether or not certain binary files (specified by the <code>Binary File Types</code> ^[187] setting) are ignored when uploading changelists
<code>com.smartbear.ptc.forceprojectpath</code>	A Boolean setting (values: true/false) to use project path instead of configpath if your <code>PTC projects</code> ^[666] have variant sub-projects.

Java Memory Settings

There are two aspects that affect the Java Virtual Machine regarding memory management and that may affect application performance. One is the maximum heap size and the other is the configuration of the garbage collector (GC).

- The default maximum heap size that is available for Collaborator client applications depends on the Java Runtime Environment (JRE) version being used: 64 MB, if you have JRE version 5.0 and earlier, or 1GB or one quarter of physical memory (what is the smaller) for later versions unless your computer has only one processor or it has less than 2 GB of RAM (in which case 64 MB is used).

By default, the maximum heap size for the Collaborator Server is set to 1 GB. You can increase the maximum heap size by using the `-Xmx` switch. For example, to set the maximum heap to 2 GB, use the following line:

```
-Xmx2G
```

You can use the letters G, M and K to specify gigabytes, megabytes and kilobytes. You can specify only whole numbers. So, for example, instead of using `-Xmx1.5G`, you have to use `-Xmx1536M`. Note that some Java virtual machines do not support the `-X` option.

Increasing the maximum heap size can help you if you got the errors like `java.lang.OutOfMemoryError: Java heap space errors` in your logs.

We would recommend that you increase the maximum heap size to 2 GB or even more, depending on the typical size of documents that your users upload to the server.

- In addition to increasing the heap size, you will also likely need to change the garbage collector's settings, especially if you see the "`java.lang.OutOfMemoryError: GC overhead limit`" error in in your server logs, or experience severe performance degradation.

To change the garbage collector settings for the Collaborator Server, add the following line to the `ccollab-server.vmoptions` file:

```
-XX:+UseConcMarkSweepGC
```

If you are using Java 7 Update 45 or later, use the following line instead:

```
-XX:+UseG1GC
```

We do not recommend applying these settings, if your computer has 2 or fewer processors (cores). If you are running into performance issues when performing reviews, you should consider running the Collaborator Server in a system that has at least 4 processors (cores). Changing these garbage collector settings will improve your server performance, especially if you also use the `-Xmx` option to increase the maximum heap size.

Note that the operating system can report that your java process consumes more memory than the maximum heap size you specified. This happens because other parts of the Java runtime, for example, PermGen, consume memory as well. You can try using the `-XX` parameters to tune these parts. See [Oracle HotSpot VM documentation](#) for complete information. Note that quite often the `-X/ -XX` options are JVM-specific and Oracle can change them without notice. We recommend that you consult documentation of your Java Virtual Machine.

Server Temporary Directory

By default, the server will use the *tomcat/temp* subdirectory under the Collaborator Server installation directory as the temporary directory. To use an alternate location, specify the Java temporary directory variable in `ccollab-server.vmoptions`, for example:

```
-Djava.io.tmpdir=/path/to/temp/directory
```

Similarly (though less likely to be needed), this can be done for the Collaborator clients in the corresponding `.vmoptions` files.

Network Proxy Settings

To configure server proxies, use the `ccollab-server.vmoptions` file. See [Network Configuration](#) for information on available settings.

Network Connection Debugging

To debug LDAP or SSL connection problems as well as other network related issues, add the following line to the `ccollab-server.vmoptions` file:

```
-Djavax.net.debug=all
```

After restart, Collaborator will create an additional log file, `output.log`, on the server computer with trace information on the issue.

11.4 Appendix D: Java Compatibility Matrix

The following table describes which versions of Java environment are supported by different versions of Collaborator:

	Java 6	Java 7	Java 8	Java 9	Java 11	RTC 4. x install with Java 6	RTC 5. x install with Java 6	RTC 6. x install with Java 6	RTC 6. x install with Java 7	RTC 6. x install with Java 8	Eclipse running Java 6	Eclipse running Java 7	Eclipse running Java 8

Col lab ora tor Ser ver 12. 0 an d Ne we r	No	No	Ye s+	Ye s	Ye s	No	No	No	No	Ye s	NA	NA	NA
Col lab ora tor Ser ver 11. 3- 11. 5.x	No	No	Ye s+	Ye s	Ye s	Ye s	Ye s	Ye s	Ye s	No	NA	NA	NA
Col lab ora tor Ser ver 11. 0- 11. 2	No	Ye s+	Ye s	No	No	Ye s	Ye s	Ye s	Ye s	No	NA	NA	NA
Col lab ora tor Ser ver 9. x- 10. x	No	Ye s+	Ye s	No	No	Ye s	Ye s	Ye s	Ye s	No	NA	NA	NA

Col lab ora tor Ser ver 8.5 .x	No	Ye s+	No	No	No	Ye s	Ye s	No	No	No	NA	NA	NA
Col lab ora tor Ser ver 8.0 - 8.4 .x	Ye s+	Ye s	No	No	No	Ye s	Ye s	No	No	No	NA	NA	NA
Col lab ora tor Ser ver 7.x	Ye s+	No	No	No	No	Ye s	Ye s	No	No	No	NA	NA	NA
Col lab ora tor Ser ver 6.x	Ye s+	No	No	No	No	No	No	No	No	No	NA	NA	NA

Col lab ora tor Cli ent 12. 0 an d Ne we r	No	No	Ye s+	Ye s	Ye s	NA							
Col lab ora tor Cli ent 11. 3 - 11. 5.x	No	No	Ye s+	Ye s	Ye s	NA							
Col lab ora tor Cli ent 11. 0- 11. 2	No	Ye s+	Ye s	No	No	NA							
Col lab ora tor Cli ent 9. x- 10. x	No	Ye s+	Ye s	No	No	NA							

Col lab ora tor Cli ent 8.5 .x	No	Ye s+	No	No	No	NA							
Col lab ora tor Cli ent 8.0 - 8.4 .x	Ye s+	Ye s	No	No	No	NA							
Col lab ora tor Cli ent 7.x	Ye s+	No	No	No	No	NA							
Col lab ora tor Cli ent 6.x	Ye s+	No	No	No	No	NA							

Col lab ora tor Ecl ips e plu gin 12. 0 an d Ne we r	No	No	Ye s+	Ye s	Ye s	No	No	No	No	Ye s	No	No	Ye s
Col lab ora tor Ecl ips e plu gin 11. 3 - 11. 5.x	No	Ye s+	Ye s+	Ye s	Ye s	No	No	No	Ye s	No	No	Ye s	Ye s
Col lab ora tor Ecl ips e plu gin 11. 0- 11. 2	No	Ye s+	Ye s	No	No	No	No	No	Ye s	No	No	Ye s	No

Col lab ora tor Ecl ips e plu gin 9. x- 10. x	No	Ye s+	Ye s	No	No	No	No	No	No	No	No	Ye s	No
Col lab ora tor Ecl ips e plu gin 8.5 .x	No	Ye s+	No	No	No	No	No	No	No	No	No	Ye s	No
Col lab ora tor Ecl ips e plu gin 8.0 - 8.4 .x	Ye s+	Ye s	No	No	No	Ye s	Ye s	Ye s	No	No	Ye s	Ye s	No

Col lab ora tor Ecl ips e plu gin 7.x	Ye s+	No	No	No	No	Ye s	Ye s	No	No	No	Ye s	No	No
Col lab ora tor Ecl ips e plu gin 6.x	Ye s+	No	No	No	No	No	No	No	No	No	No	No	No

Notes

- In table above, the "Yes+" means that the given version of Collaborator was built using the given version of Java environment.
- OpenJDK is recommended, Oracle JRE/JDK might work as well.
- On systems with multiple JREs installed, it may be necessary to specify to the installer which JRE should be used for Collaborator. On Windows platforms, running the installer with the -manual argument will suppress the JRE search and cause the installer to prompt for the JRE location (specifically, java.exe). On *nix platforms, you can specify the JRE location by setting the INSTALL4J_JAVA_HOME_OVERRIDE environment variable to the JAVA_HOME value.

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