

Getting Started With Code Collaborator

For the Developer:

I. Download a client

You'll most likely need a client if you plan on uploading files from your Version Control/SCM. Download the "Client Installer" listed under your platform from the Download page, <http://www.smartbearsoftware.com/codecollab-download.php>. If you plan on integrating with Vault versions 2.x and 3.x or Visual SourceSafe, you should download the "Legacy GUI Client."

II. Installation Wizard

Once you've downloaded the installer, open it to begin the installation wizard. The wizard should guide you through the steps below:

1. Welcome Screen

This just welcomes you to the installation process. Click *Next* to proceed.

2. EULA

Read the license agreement, and select *I accept the agreement* before clicking *Next*.

3. Destination Directory

Choose the folder where you would like the Code Collaborator client to be installed. You'll need at least 21.58 MB of disk space.

4. Start Menu Folder

Select a Start Menu folder where you'd like to create the Code Collaborator shortcut.

5. Code Collaborator Configuration

Here, you will enter the Code Collaborator Server URL, username, and password. Remember to specify the protocol (e.g. <http://> or <https://>) and port number, and path. If you do not know this, ask your Code Collaborator system administrator.

6. Additional Tasks

Choose whether to run the Tray Notifier on Startup.

7. Finish

Click *Finish*, and you're done installing the client.

III. Configure the Client to your SCM

1. **GUI** - Open up the GUI client, and click *Add* or *Edit* on the right side of the client. Use the Configuration wizard to enter the location of your local source code into the *Local Path* field at the top, or choose the SCM of your choice.
2. **Command-Line** – For instructions, visit http://smartbearsoftware.com/docs/collab-manual/index.html?cmdline_configure.html.

IV. Log into Code Collaborator Web Browser Client

Open a web browser, and go to the Code Collaborator server URL provided by your system administrator. Enter your login name and password. Once you log in, you can check your Action Items to see if you have any assigned reviews. You can also edit Preferences by clicking *Prefs* in the menu bar on the top right of the screen. For more information on User Preferences, go to our Owner's Manual at http://www.smartbearsoftware.com/docs/collab-manual/index.html?ws_user_prefs.html.

V. Create a Review as an Author

1. When making a new review, click *New Review* in the menu bar at the top right.
2. Fill in the basic information and participants in the review wizard.
3. Add review materials via GUI client, command-line client, or web browser client.
 - **GUI** – Open up the GUI client and click on the SCM of your choice. Use the *Add to Review* buttons at the bottom to add materials to an existing or new review.
 - **Command-Line** – Visit the command-line client section in our Owner's Manual as mentioned above.
 - **Web browser client** – You can add supporting documents not under Version Control by clicking "Attach File" in the Materials section.

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

VI. **Add Comments and Defects as a Reviewer**

Once you receive a review under Action items, click the review you’d like to review. Under the Materials section, click a file. The side-by-side view will open, and you will be able to make comments and defects here.

1. **Comment** - Click on the line number you want to comment on, and type your comment. Comments will be threaded into a conversation, and unread comments will be marked in yellow. You can click *Accept* or *Mark Read* to clear the unread markings.
2. **Defects** – Click on the line number you want to attribute the defect to. Make sure the *Add Defect* tab is selected and write a description of your defect, filling in the fields underneath. Once a defect is made, you can mark the defect as fixed, edit or delete the defect, or make it an external defect by using the links at the bottom of the comment box. If defects are made, authors should fix the defects and upload the fixes, and reviewers should inspect the code again until the code is acceptable.

VII. **Finish Review**

Once all the defects are found and all the comments are read, you can finish the review by clicking *Review Finished* at the bottom of the review summary page in your web browser client.