Customer Success Onboarding Guide
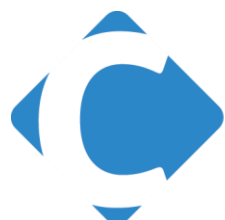
Hello and Welcome to the SmartBear family!

SmartBear has put a major focus on Customer Success to ensure our customers are able to maximize the return on their investment in their SmartBear products.

This document is your On Boarding Guide, and go to reference for all training needs. Our goal is to help plot you and your teams learning stages from beginner to advance within Collaborator. We are here to assist in your project benchmarks and challenges along the way.

Please reach out directly to your Customer Success Advisor or Territory Manager if you have any questions. You can also reach us at Customers@Smartbear.com.

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Admin Area – Review Templates

➢ Open the Admin area and Review Templates

➢ Box to the left of screen is the Admin menu, which contains a number of helpful links that guide you through different configuration sub- categories.

➢ Roles – specify the rights and privileges of review participants.

➢ Checklist on the review header – most effective way to eliminate frequently made errors and to combat the challenges of omission finding.

➢ Review Custom Fields – create your own fields on the review header for users to enter necessary information.

➢ Defect Custom fields – create your own fields for users to annotate defects with classification information.

➢ Participant Custom Fields

➢ External Links – 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.

➢ Review Reject Reasons – reason for rejection can be required by the administrator and will be displayed in the review details. A rejected review cannot be re-opened.
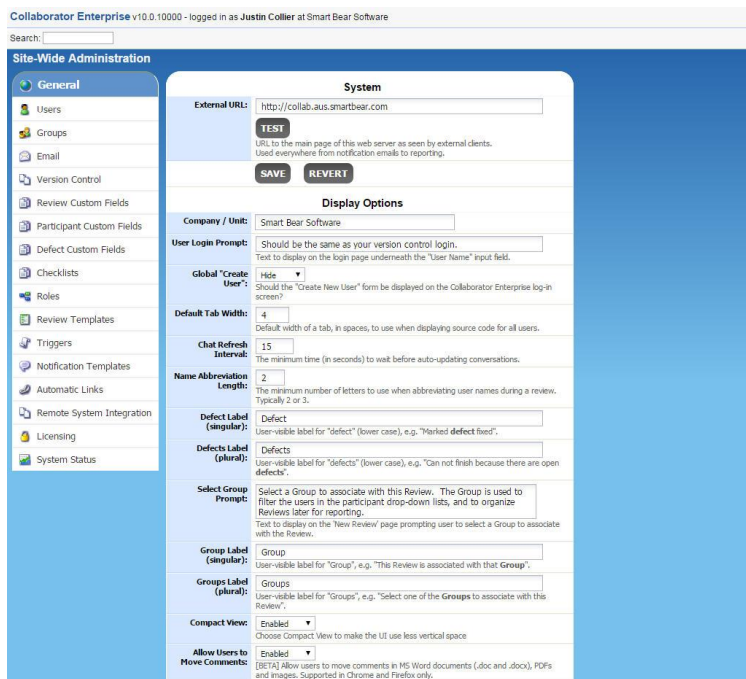
For more assistance, visit the Collaborator Product Hub and view topics under Installation and Getting Started.

Collaborator

Getting the Most out of Collaborator

Configure Options

- ➤ [Electronic Signatures](#) - can be required based on the template that is driving the review, or enforced globally.
- ➤ Templates - What end users see and select to drive their review workflow.

  - o "Review Template" or "Review Workflow" is a particular set of roles, custom fields, and other options that determine the behavior or workflow of a review.

Review Templates		New Template
Name	**Description**	
Default	The default template.	[Edit] [Disable]
Formal Inspection		[Edit] [Enable]
Internal Review		[Edit] [Disable]

- ➤ [Roles](#) – indicates the way in which a person participate in a review.

  - o Author
  - o Reviewer
  - o Observer
  - o Moderator

Edit roles: Standard
Configure role-based workflow in detail using the form below.
To disable a role: Use a blank title.

Configuration Title: Standard
Descriptive name of this set of roles.

	Moderator	Author	Reviewer	Observer
Title:		Author	Reviewer	Observer

Title that will be displayed everywhere else.
A blank title disables the role.

	Moderator	Author	Reviewer	Observer
Role Description:		Developer responsible for the content being reviewed.	Someone actively involved in reviewing the materials.	Someone participating but not necessarily passing accept/reject

Description that will be shown in on-line help documentation.

- ➤ Roles can be customized in the following ways:

  - o Minimum Number of Users to Complete Review
  - o Automatic links to other tools based on keywords
  - o Require that all comments in a Review have been read

Per User Subscriptions Settings

- ➤ Review and file subscriptions – automatically subscribe and be included in reviews with a preferred author. File Subscriptions automatically subscribe and can be included in reviewers where a particular file or file path is under review based on a pattern.

Account	Notifications	Display	Diff Viewer	**Review Subscriptions**	File Subscriptions

Author-based subscriptions allow you to be automatically included in reviews where a given user is an author.
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.

Review Author: | **My Role:** Reviewer | **CREATE NEW**

Getting the Most out of Collaborator Continued

Groups

➢ 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.

Create a review with plugins

➢ Eclipse & Visual Studio - Perform the entire review without leaving your IDE. No context switching between the IDE and a web browser is required.

➢ P4V – right click on a changelist in the GUI a new menu item appears at the bottom allowing you to associate that changelist with a review or create a brand new review with that changelist.

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Tips for Administrators

➢ Go to Admin > General > Access Restrictions and look at 'Report Access' and 'Restrict Access to Review'. These two settings provide security for reviews and review reports.

➢ Go to Admin > General > Review Process Options and consider enabling the 'Default Review Deadline' feature.

➢ Go to Admin > Groups and create a new group. Edit the new group and notice the 'Review Pool Participant' dropdown menu. Set this to 'Yes' if you would like Review Creators to be able to assign reviews to this group.

➢ The 'Standard' role is configured such that Reviewers mark defects as fixed.

➢ Go to Admin > Roles and edit the 'Standard' role. Take note of the 'Marks reviews "finished"' and 'Phase change waits for "finished"' settings. For a more relaxed review workflow, set the Reviewer to 'Yes' for both and the Author and Observer to 'No' for both.
  - o Remember that once a Role has been associated with a review, it cannot be modified. If you must create a new Role and associate it to the Review Template that you want participants to use.

	Moderator	Author	Reviewer	Observer
Marks reviews "finished":	No	No	Yes	Yes

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 their name crossed out.
This should be enabled for roles who have an obligation to do something in the review, e.g. open defects or make comments.

	Moderator	Author	Reviewer	Observer
Phase-change waits for "finished":	No	No	Yes	No

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 `Marks reviews "finished"` option must also be enabled.

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Tips for Administrators Continued

➢ Go to Admin > Roles and edit the 'Standard' role. Take not of the 'Required to read all comments' setting. For a more relaxed review workflow, set the Reviewer and Observer to 'No' and leave the Author set to 'Yes'.

- o Remember that once a Role has been associated with a review, it cannot be modified. If you must create a new Role and associate it to the Review Template that you want participants to use.

➢ Review Templates control what custom fields are displayed as part of a review. They also determine what 'Role Configure' a review uses.

- o When you modify a Review Template, Collaborator creates a new Template and sets the current one to 'disabled'. This disabled template will remain in use by currently open reviews but all new reviews will use the newly modified version.

➢ Automatic Links are used to "linkify" text that matches on a specified regular expression. Most users configure Automatic Links to work with their Bug Tracking utility.

Tips for End Users

Collaborator Client:

➢ Supports both a graphical and command line interface.

➢ Installers available for Windows, Linux, Solaris, BSD and Mac OS X.

➢ Make sure your Collaborator Client version matches your Collaborator Server version.

➢ Supports pre and post-commit reviews for most SCM systems - Add Changes is pre-commit and Add Versions/Diffs is post-commit.

Authoring a Review:

➢ Choose the right Group and Template for your review at the start.

➢ Assign a review to an individual or a Review Pool Group.

➢ Add as many participants as needed, but remember that more people often means a slower review.

➢ Annotating a review is best practice but not required. It's a pre-inspection phase that is valuable if your workflow requires it.

➢ Yellow highlighting indicates unread comments – you may be required to mark all comments as read.

➢ In the Rework phase, use the Collaborator Client to attach your reworked changes to the review.

➢ Don't forget to commit your files when your review completes if you're doing a pre-commit review.

➢ Color Highlighting of Comments and Defects: 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	A defect that has been tracked in an external tool.
Red	An open defect.
Yellow	An unread comment.
Green	A fixed defect or an external defect.
Gray	No defects.

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Tips for End Users Continued

Review Participation:

➢ You were either specifically assigned to the review or invited to participate via Review Pools.

➢ Review Materials section shows all files for the review – Clicking on a file opens the diff viewer.

➢ You can make overall statements or statements by line.

➢ **Defects** are items that must be addressed by the Author before the review can be closed.

➢ Once all files are reviewed return to the Review Summary screen and click Approve.

➢ **Wait** means you would like to prevent a review phase change until you have a response from someone.

➢ **Approve** means you would like to move the review to the next phase.

➢ Under Settings in the upper-right hand corner of the Web UI you can change user preferences.

➢ Comments cannot be deleted – Comments can only be redacted, which will make them hard to see.

➢ As a review participant it may be your responsibility to mark a defect as fixed – Generally, Reviewers are required to mark items as fixed.

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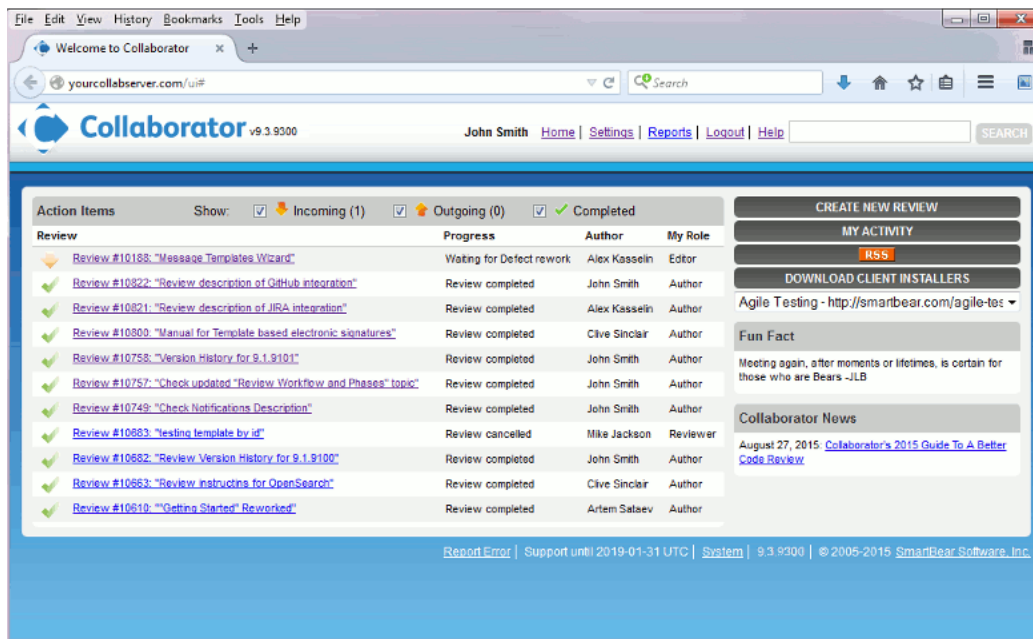
Tips for Review Checklists

Sample Checklist Items: excerpt from *Best Kept Secrets of Peer Code Review*

1. Documentation: All subroutines are commented in clear language.

2. Documentation: Describe what happens with corner-case input.

3. Documentation: Complex algorithms are explained and justified.

4. Documentation: Code that depends on non-obvious behavior in external libraries is documented with reference to external documentation.

5. Documentation: Units of measurement are documented for numeric values.

6. Documentation: Incomplete code is indicated with appropriate distinctive markers (e.g. "TODO" or "FIXME").

7. Documentation: User-facing documentation is updated (online help, contextual help, tool-tips, version history).

8. Testing: Unit tests are added for new code paths or behaviors.

9. Testing: Unit tests cover errors and invalid parameter cases.

10. Testing: Unit tests demonstrate the algorithm is performing as documented.

11. Testing: Possible null pointers always checked before use.

12. Testing: Array indexes checked to avoid out-of-bound errors.

13. Testing: Don't write new code that is already implemented in an existing, tested API.

14. Testing: New code fixes/implements the issue in question.

15. Error Handling: Invalid parameter values are handled properly early in the subroutine.

16. Error Handling: Error values of null pointers from subroutine invocations are checked.

17. Error Handling: Error handlers clean up state and resources no matter where an error occurs.

18. Error Handling: Memory is released, resources are closed, and reference counters are managed under both error and non-error conditions.

19. Thread Safety: Global variables are protected by locks or locking subroutines.

20. Thread Safety: Objects accessed by multiple threads are accessed only through a lock.

21. Thread Safety: Locks must be acquired and released in the right order to prevent deadlocks, even in error-handling code.

22. Performance: Objects are duplicated only when necessary.

23. Performance: No busy-wait loops instead of proper thread synchronization methods.

24. Performance: Memory usage is acceptable even with large inputs.

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Understanding the Desired Process - Best Practices using Collaborator

➢ **Code Review**
  o Practice lightweight code reviews
    ▪ Review fewer than 400 lines of code at a time.
    ▪ Take your time. Inspection rates should be under 300 LOC per hour.
    ▪ Do not review for more than 60 minutes at a time.
  o Set goals and capture metrics.
  o Authors should annotate source code before the review if possible.
  o Use checklists.
  o Establish a process for fixing defects found.
  o Foster a positive code review culture.

➢ **Doc, Excel, & PDF Review**
  o You can download individual versions of the original documents.
  o View highlighted differences between different versions.
  o Insert comments and defects, marked by pushpins, into the documents to foster conversation.
  o You can install the Collaborator plugin for MS Word to upload your documents directly from Word.

➢ **Image Review**
  o Images can be reviewed within the tool you can review any image type that your browser can render.
  o Side by side view to see both images the before and after at the same time.
  o Overlaid view displays the after image over the before image.
  o Making Commends and Marking Defects on the left side 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.

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Collaborator Training

Free Training and Support

[Collaborator Product Hub](#)

This page will be your one stop shop for support resources for Collaborator. Go here for best practices, videos, to connect with other users, and more. Select the icon to go there now.

SmartBear Academy – Collaborator 101, 201, 301

Ask your Customer Success Advisor for more details to sign up for these services.

101 Getting Started

    a. Code Review Benefits
    b. Best Practices of Code Review
    c. Getting the Most out of Collaborator

201 and 301 Advanced Topics

    a. Custom workflows
    b. Reporting/Metrics
    c. Requirements/Document Review
    d. IDEs
    e. SCM