

DATASHEET

Professional Services Startup Package

Ensure a successful experience and deployment right from the start by having our experts install and configure Helix ALM for optimal performance according to your preferences and compliance goals.

Through our proven model, we collaborate with your team to get you up and running quickly with Helix ALM so you're managing requirements, running tests, and tracking issues in less time. From the initial discovery meeting through production system kickoff and training, we're with you every step of the way.

Key Benefits

- **Accelerates time to value:** Configuration managed by an expert Solution Engineer to deploy Helix ALM quickly and most efficiently in your environment
- **Lessens burden on internal resources:** Provides you with an accelerated path to adoption through the guidance of pros who know Helix ALM better than anyone
- **Removes barriers to your success:** Avoid project snags, save time, and follow best practices with setup and configuration managed by the experts
- **Lowers risk:** Follow a proven process with clearly defined deliverables — and get the most out of your Helix ALM investment and compliance features
- **Optimizes outcomes:** Optimal configuration maximizes your performance today and sets you up for long-term success with your product development teams

Startup Package — What's Included?

Through our Startup Package, we will align and configure Helix ALM according to your preferences, including the following:

- **Artifact/requirement types:** Configuration for up to 20 different artifact types with optional and required custom fields
- **Compliance rules and auditing:** Setup Helix ALM to enforce and track compliance-related rules for up to 5 compliance goals such as audit logging, electronic signature enforcement, enhanced compliance rules for testing, baselines, and more
- **Working methods:** Configuration for up to 3 workflows according to Agile or Hybrid working methods
- **Traceability strategy:** Configuration of up to 10 unique links, which can be based off requirements decomposition, risk analysis, testing methods, and many other traceability possibilities within the context of how you work
- **Artifact view setups:** Configuration and confirmation of up to 3 standard views commonly used by groups per module (in typical usage)
- **Dashboard:** Configuration of up to 3 Dashboards
- **Reporting:** Creation and design of up to 5 reports for information you need to capture, such as Traceability Matrix or other reporting needs

- **Artifact import:** Assistance with importing up to 3 existing documents, such as requirement documentation from Word and Excel. If you require additional import services, we can scope and complete the work for you.
- **User group setup:** Configuration for up to 6 primary user groups (conducted after UAT working session begins)

A Proven 4-Step Process for Success

We follow a highly successful process to complete your project efficiently, and we perform your project remotely to minimize expenses.

Typical projects take one full week to complete, and then we schedule production system kickoff and training as requested.

1. **Discovery Workshop:** Your Solution Engineer will conduct a 2-hour Discovery Workshop¹ with your core team (up to 6 people) depending on the scope of your project. This session will cover key tasks and helpful worksheets you'll complete that guide you through the process before your project begins.

Deliverable: Alignment on the scope of your project and the plan we will be executing, with clear responsibilities identified for your Solution Engineer and your core team.

2. **Service Project:** We leverage a proven, iterative process to complete your configuration tasks, holding daily interactive meetings with your core team to ensure you have full visibility into project status and to fine-tune configurations and workflows along the way.

Upon UAT sign-off, we make any final requested configuration adjustments and start importing data

and setting up users in the production environment before scheduling production kick-off.

We also have considerable expertise in completing integrations, for example with Jira. While our Startup Package does not focus on integrations, we're available to scope any additional integration work you require and complete it together with your Helix ALM Startup services.

Deliverable: Expert completion of your project according to your configuration requirements, with deployment of Helix ALM in your production environment.

3. **Configuration Documentation:** Helix ALM includes a feature for a fully documented configuration report, which greatly reduces your validation efforts and should be modified and included in your validation plan. After we complete your project, you will receive production configuration documentation for your validation purposes.²

- While Helix ALM can be configured to match most compliance and regulatory goals, many clients use document control or QMS systems to store their final documents and reports. Simply identify your preferred approach and work with your Solution Engineer to ensure proper automation or baselining.

Deliverable: Production configuration documentation for your validation purposes.

4. Training: After configuration is complete, get the most from your investment in Helix ALM by scheduling training for your users and admins. We will review the advanced capabilities and functionality available to your team, answer questions, and enhance their productivity right from the start.

As an option, we can complete a mini-admin training session with you before we hold the Discovery Workshop or begin the service project as outlined in steps 1 and 2. This option is sometimes requested by organizations that prefer to have their internal teams maintain responsibility for completing various configuration tasks.

Deliverable: Training options before or after your project is completed, making users and admins even more successful with Helix ALM's capabilities.

Collaboration with Your Team

We actively participate with your core team throughout the project! When considering who to assign to your core project team, we recommend your core team members have good internal process knowledge and are subject matter experts in their respective fields — with access to management as well as those who complete the work.

The most common areas and roles are:

- **Research:** Scientists, Human Factor Engineering, Marketing
- **Development:** System Engineering, Software and/or Hardware Engineering
- **Quality Assurance:** Verification and Validation Engineering, Test Engineer
- **Risk Management:** Risk Manager

- **Project Management:** Project Engineering, ScrumMaster, etc.
- **Regulatory or Compliance Personnel**
- **IT or DevOps Personnel** (unless Cloud-based)

To ensure a smooth experience and efficient completion of your project, we will request contact details for your core team members and an overview of their key responsibilities.

Get Started Today

Maximize your Helix ALM investment while reducing your total cost of ownership through our Startup package! Our team is here for you and has the expertise to ensure successful configuration of Helix ALM in your environment, saving you time while getting you up and running optimally and according to best practices.

Contact us today to take advantage of our Startup package or to discuss your specific requirements.

CONTACT US

consulting@perforce.com

¹ If multiple projects and products are intended to be managed in Helix ALM, we recommend a full day of discovery services so we can fully scope the service efforts required. Teams greater than 25 engineers, more advanced or complex product lines, or high-risk Class III medical devices should also consider a full day of discovery services.

² Perforce offers validation assistance services, if needed, at additional costs. We offer our development and quality process documentation for reference and an invitation for an on-site audit if needed.