PERFORCE

WHITE PAPER

Managing Requirement Reviews with Helix ALM

Introduction

Whether you need feedback from a software architect or final approval from a project stakeholder, Helix ALM's flexible requirements reviewing options help your team successfully manage reviews.

Capturing requirement feedback is one of the most critical aspects of the management process because it helps ensure that requirements are complete and that project team members agree on what will be delivered before implementation begins. Review participation from team members is essential to help eliminate costly rework and schedule delays during a project caused by incorrect, ambiguous, or missing requirements, unforeseen risks, or incorrect assumptions.

Understanding Helix ALM's requirements reviewing features can help you choose the optimal way for your team to request and capture review feedback. Before you formalize your review process, spend time exploring and using Helix ALM's reviewing features.

Review Activity in One Place

The hub of requirement review activity is the Review Mode View, which is available when you open a requirement document. This view is designed specifically for reviewing and commenting on requirements.

Review Mode View displays a document in hierarchical outline format. Users can only perform review-related activities, such as add review notes, on individual requirements or the entire document.

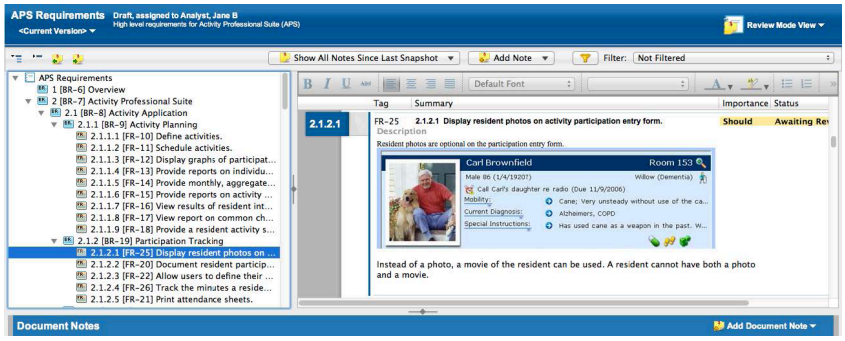

Figure 1: Use Review Mode View to review and comment on requirements.

Review Mode View consolidates all related requirement feedback in a single location and displays review notes and comments inline with the corresponding requirements. This gives reviewers the opportunity to view and comment on other reviewers' feedback and makes it easier for users responsible for implementing feedback to view all notes.

Submitting Requirements for Review

When requirements or documents are ready for review, users can assign them or email a document hyperlink to reviewers. There are also reviewing options available for team members who do not use Helix ALM.

ASSIGN FOR REVIEW

The most common way to request feedback is to assign requirements or a document for review. After completing a review, users can enter a workflow event from the Workflow menu, such as Ready for Approval, to move the item to the next step in the review process. Both the assignment and any activities entered by the reviewer are tracked with the requirement or document, which provides a complete trail of the activities performed on the item.

A single requirement can be assigned to multiple users at once, allowing you to capture feedback from a group simultaneously and encourage discussion among reviewers based on each other's comments. The requirements and documents workflows can handle multiple

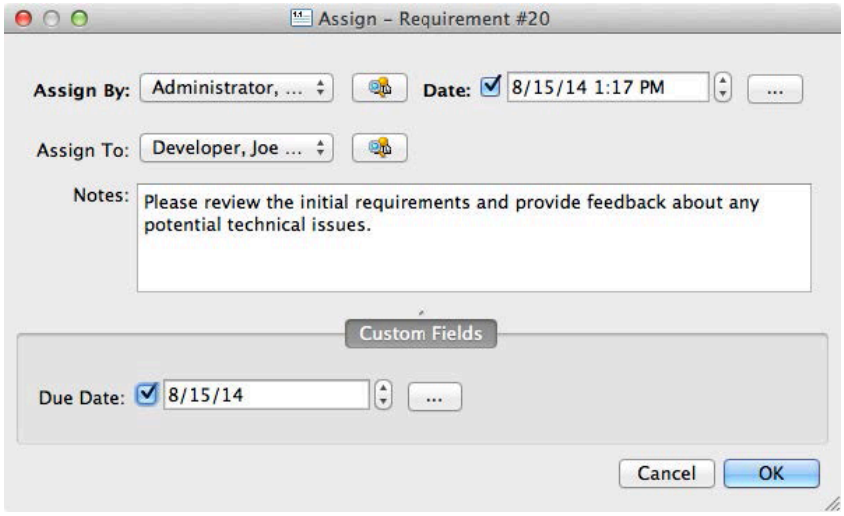

Figure 2: Assign items for review to request feedback.

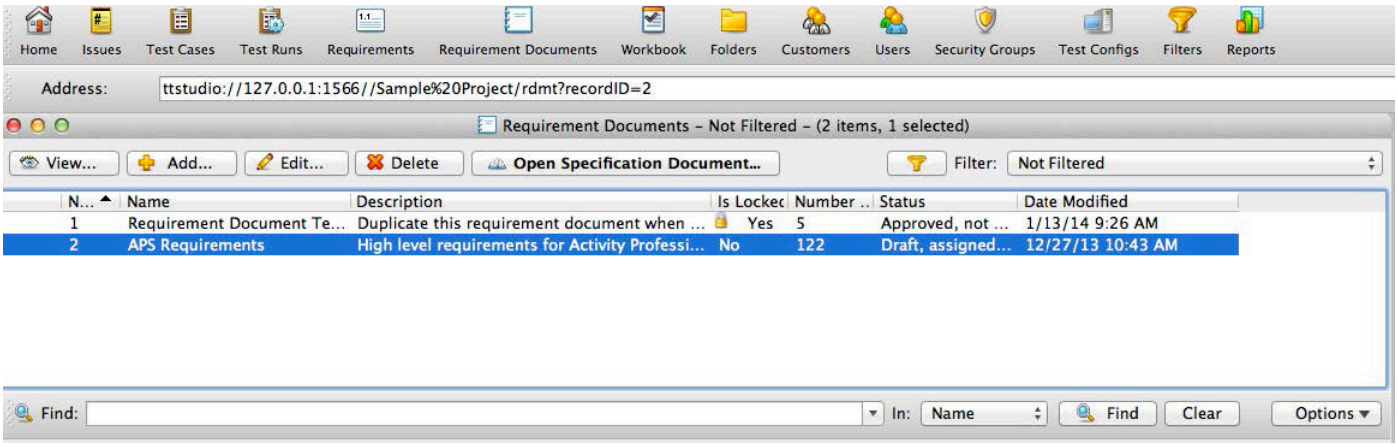

Figure 3: The Address bar displays requirement and document URLs.

assignments to make sure items move to the appropriate status when reviews are complete. For example, you may not want a requirement to move to the next step in the process until all stakeholders complete reviews.

You may decide to configure automation rules to automatically move requirements and documents through your review process. Helix ALM can automatically email notifications or perform other actions when requirement content or status changes. For example, Helix ALM can email reviewers when they are assigned requirements for review.

EMAIL A HYPERLINK

Another way to request feedback is to email a requirement or document hyperlink. Each Helix ALM item has a unique URL that is displayed in the Address bar. Users can paste the URL into an email and send it to reviewers, who can then click the link to go directly to the requirement or document to review. For example, a user who wants feedback before submitting a requirement for final approval can email others to request feedback and include a link to the requirement for easy access.

If reviewers only need to provide feedback on a specific set of requirements, users can email a hyperlink that goes directly to Review Mode View in the document. Before copying the URL from the Address bar, the window can be filtered to narrow the set of requirements.

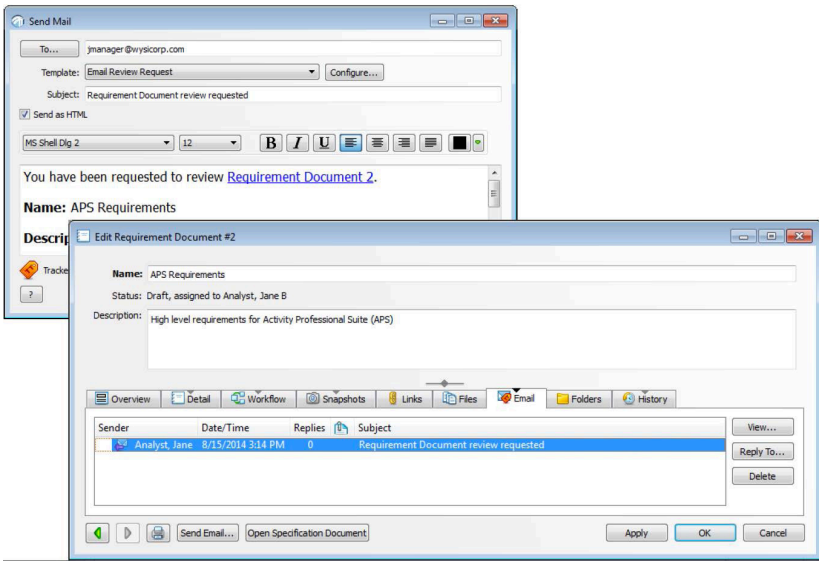

Figure 4: Email review requests are tracked with related items.

Providing hyperlinks is especially helpful for reviewers who use Helix ALM infrequently and may not know where to go to review requirements.

If an email is sent from a Helix ALM project that has email tracking enabled, the email is saved with the requirement or document it was sent from. This helps maintain a complete record of communication about an item for historical purposes.

REVIEW METHODS FOR EXTERNAL REVIEWERS

When needed, users can export documents to Microsoft Word and email the document to reviewers who do not use Helix ALM. A document or individual requirements can also be printed. When these methods are used, the review requests and feedback are not tracked, making the review process manual and untraceable in Helix ALM.

Providing Review Feedback

There are a few ways that reviewers can provide feedback, including adding review notes, emailing feedback, or editing requirements.

ADD REVIEW NOTES

Reviewers can add review notes, which are informational workflow events displayed in Review Mode View, to requirements and documents. For example, the default requirements and documents workflows include the Review Note and Comment review events.

Requirement review notes are displayed inline with the specific requirement, making it easy to share feedback with other users and maintain a thread of all feedback in the requirement.

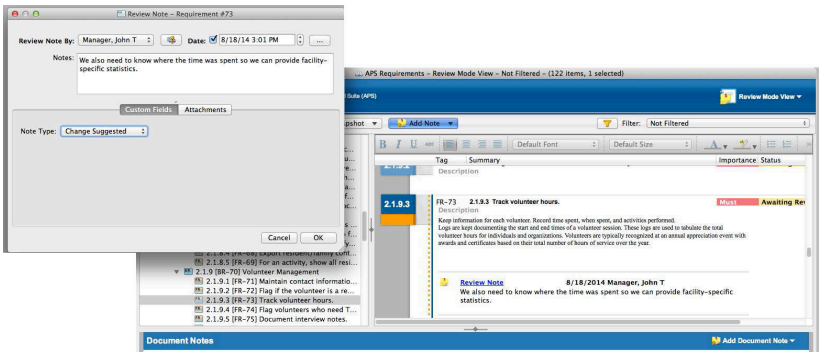

Figure 5: Requirement review notes are displayed inline with the requirement.

EDIT REQUIREMENTS

Depending on security permissions, some reviewers may be able to make changes or comments directly in requirements. The best way for reviewers to identify their comments or changes is to insert a stamp, which usually includes the user's name and current date, in the requirement description. Stamping helps differentiate feedback from other requirement content. Reviewers can also apply text formatting to their changes to make it easier to tell them apart from other changes.

If reviewers make changes directly to requirements, it is a good idea to create a document snapshot before submitting requirements for review. This allows you to capture the document, compare

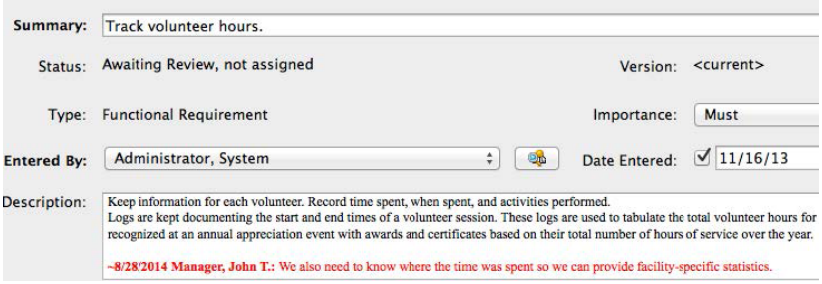

Figure 6: Stamps and formatting can identify feedback in requirements.

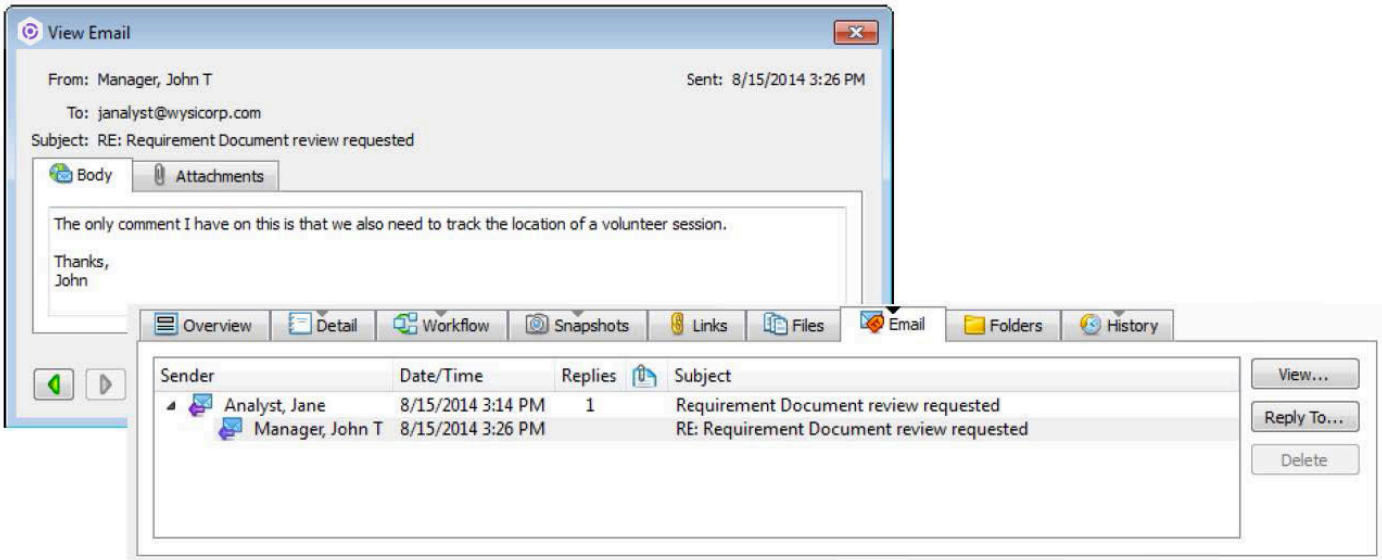

Figure 7: Email sent by reviewers can be tracked with requirements.

newer and older versions of the document, and view the differences between them.

EMAIL FEEDBACK FROM HELIX ALM

Reviewers can email from requirements or documents to provide feedback. If email tracking is enabled for the project, sent email and any replies are saved with the item. This stores the complete discussion trail associated with an item.

You're Now Ready to Manage Requirement Reviews with Helix ALM

Helix ALM's flexible reviewing features help ensure that requirements are complete and that project team members agree on what will be delivered before implementation begins. Now that you know more about initiating requirement reviews and capturing feedback with Helix ALM, you can refine your review methods and use the approach that best fits your process.

Try Helix ALM today > http://info.perforce.com/try-perforce-helix-alm-free

About Perforce

Enterprises across the globe rely on Perforce to build and deliver digital products faster and with higher quality. Perforce offers complete developer collaboration and agile project management tools to accelerate delivery cycles – from agile planning tools to requirements, issues and test management, which then link to all source code, binary assets and artifacts for full build and release tracking and visibility. The company's version control solutions are well known for securely managing change across all digital content – source code, art files, video files, images, libraries – while supporting the developer and build tools your teams need to be productive, such as Git, Visual Studio, Jenkins, Adobe, Maya and many others. Perforce is trusted by the world's most innovative brands, including NVIDIA, Pixar, Scania, Ubisoft, and VMware. The company has offices in Minneapolis, MN, Alameda, CA, Mason, OH, the United Kingdom, Finland, Sweden, Germany, and Australia, and sales partners around the globe. For more information, please visit www.perforce.com