Managing Requirement Reviews with TestTrack RM

by Amy Kearns

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

Capturing requirement feedback is one of the most critical aspects of the requirements 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 TestTrack RM's reviewing features can help you choose the optimal way for your team to request and capture review feedback. Before you formalize your review process, plan to spend time exploring and using TestTrack RM's reviewing features.

All Review Activity in One Place

The hub of requirement review activity is TestTrack RM's Review Mode View, which is available in the Specification Document window. This view is designed specifically for reviewing and commenting on requirements.

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

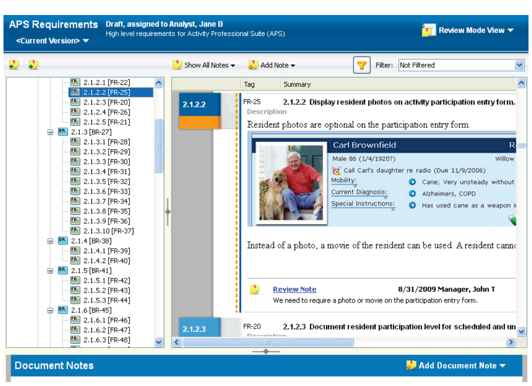

Figure 1: Review Mode View allows users to review and comment on requirements

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

Assign for review

The most common way to request feedback is to assign requirements or a requirement document for review. After completing a review, users can enter an activity from the Activities 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 requirement document, which provides a complete trail of the activities performed on the item.

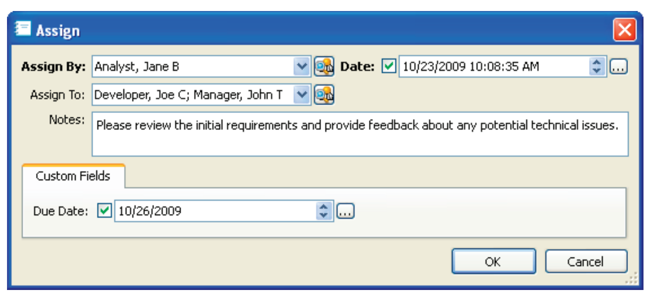

Figure 2: Assign items for review to request feedback

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 requirements document workflows can handle multiple 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 requirement documents through your review process. TestTrack RM can automatically email notifications or perform other actions when requirement content or status changes. For example, TestTrack RM can email reviewers when they are assigned requirements for review.

Email a hyperlink

Another way to request feedback is to email a requirement or requirement document hyperlink. Each TestTrack RM 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 requirement 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.

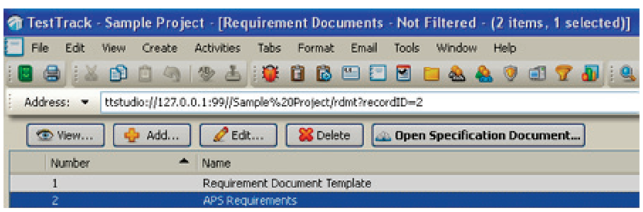

Figure 3: The Address bar displays requirement and requirement document URLs

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 Specification Document window. Before copying the URL from the Address bar, the window can be filtered to narrow the set of requirements. Providing hyperlinks is especially helpful for reviewers who use TestTrack RM infrequently and may not know where to go to review requirements.

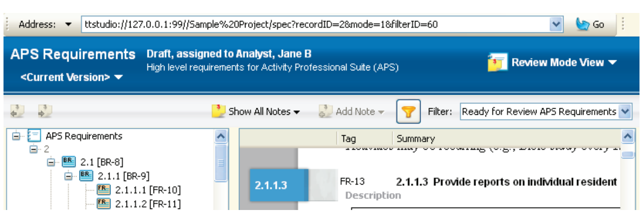

Figure 4: Hyperlinks can direct users to a specific set of requirements in Review Mode View

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

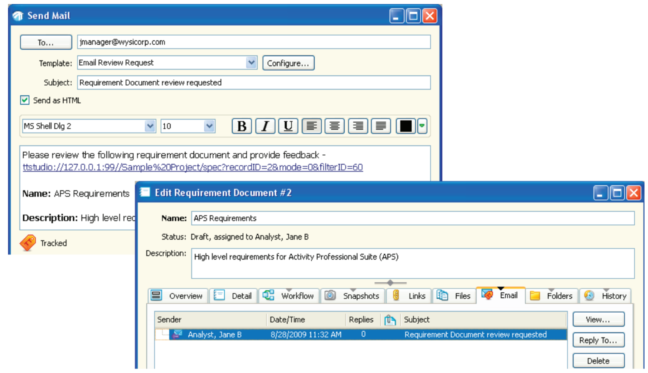

Figure 5: Email review requests are tracked with related items

Review methods for external reviewers

When needed, users can export requirement documents to Microsoft Word from the Specification Document window and email the document to reviewers who do not use TestTrack RM. A requirement 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 TestTrack RM.

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 that are displayed in Review Mode View, to requirements and requirement documents. For example, the default requirement and requirement document 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.

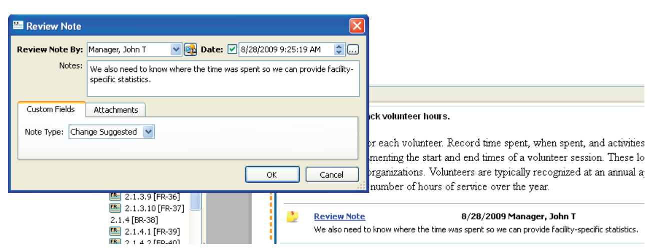

Figure 6: Requirement review notes are displayed inline with the requirement

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.

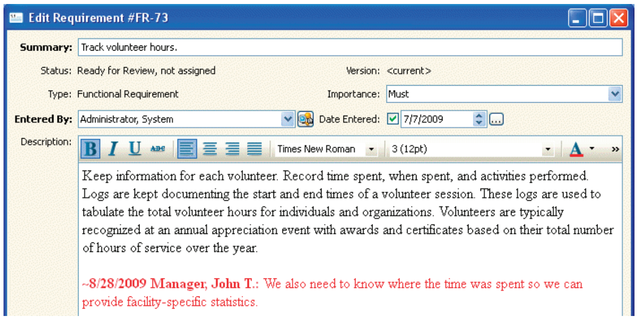

Figure 7: *Stamps and formatting can identify feedback in requirements*

If reviewers make changes directly to requirements, it is a good idea to create a requirement document snapshot before submitting requirements for review. This allows you to capture the requirement document, compare newer and older versions of the document, and view the differences between them.

Email feedback from TestTrack RM

Reviewers can email from requirements or requirement 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.

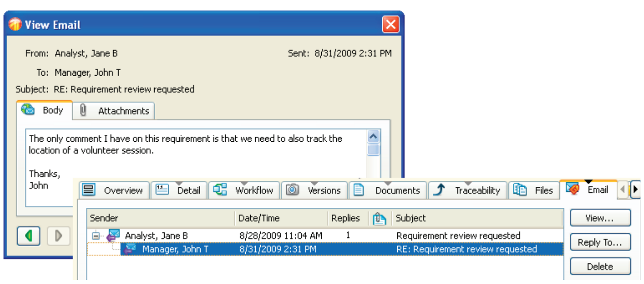

Figure 8: *Email sent by reviewers can be tracked with requirements*

You're Now Ready to Manage Requirement Reviews with TestTrack RM

TestTrack RM'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 TestTrack RM, you can refine your review methods and use the approach that best fits your process.

About the Author

Amy Kearns is a senior technical writer with Seapine Software with over 10 years experience in documentation and training development.