



Build great products.

Contour Review Center User Guide

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1 Welcome to Contour

CONTOUR 2.9.8

Review Center User Guide

OVERVIEW

Welcome to Contour.

Jama Contour is designed to provide you and your entire team a centralized, light-weight application for managing requirements. This user guide is written to help you get the Review Center licensed in either an evaluation or production environments.

Licensing is relatively straightforward, but we are happy to remotely license and configure the Review Center for you if you'd prefer. If you run into trouble, give us a call (Technical Support) at 1-800-679-3058 or support@jamasoftware.com. Thanks for choosing Contour. Enjoy the freedom of collaborative requirements management.

503.922.1058 | success@jamasoftware.com | www.jamasoftware.com

2 Review Center

Review Center is a module within Contour that provides a fast and easy way to collaborate on requirements. It enables your team to discuss, review and approve requirements with stakeholders and customers in real-time, ensuring you get requirements right the first time. The Review Center enables companies to define new products by leveraging the collective genius of everyone involved. Review Center can cut your requirements approval cycles from weeks to days.

1. [Initiate a Review](#) - To begin, select the requirements you want feedback on, set a deadline and invite the people you want to participate in the review. When applicable, give authority to team members you'd like to approve and electronically sign-off on the requirements.
2. [Gather Feedback](#) - Your reviewers get an email invitation, log in to the review and provide feedback. Reviewers can see the conversation that's taking place and respond with questions, propose changes and raise issues about requirements, as well as leave general comments. In addition to their feedback, approvers will mark items as 'approved' or flag ones that 'need more work'.
3. [Monitor Progress](#) - As the author, you can track the overall progress of the review and view your team's statistics to help you determine which requirements have the most feedback, questions and issues to address. This will help you focus on the requirements that need more work and will need editing.
4. [Incorporate Feedback](#) - While maintaining relevant feedback, you can make changes to

individual requirements. Changes to requirements are automatically updated in Contour within the version history, and your team is notified that a new revision is ready. Multiple revisions may be needed to gain final approval and The Review Center keeps track of it all.

5. [Complete Review](#) - When your team approves all the requirements, you can update the status in Contour and notify your team that the requirements are ready for development. Now, everything is captured in one place. Everyone is in sync. And, your requirements approval process is collaborative, fast and agile.

2.1 Review Center Licensing and Setup

The Review Center is a licensed module of Contour. Please contact sales@jamasoftware.com to request a trial license. The Review Center is activated by default for evaluations.

Organizations upgrading from an earlier version of Contour automatically receive a 30 day trial license that can be activated by an Organization Administrator. In the "Administration" mode of Contour, select the "License" section in the left navigation pane. Click "Activate Review Center" in the table under "Modules".

User Licenses

Access Level	Description
Float	Users with the Float license have full access to the Review Center.
Named	Users with the Named license have full access to the Review Center.
Collaborator	Users with the Collaborator license will have the opportunity to be involved in reviews, but will not have the ability to create reviews.
Reviewer	Users with the Reviewer license will have the opportunity to be involved in reviews, but will not have the ability to create reviews. Users with the Reviewer license will have no access to the Contour core product.

Review Center Configuration

The Review Center is integrated with Contour and does not require any configuration to connect to Contour.

Projects | Reviews | Redside Consulting | Hi Contour | My Profile | Administration | Reports | Help | Log Out | jama

Back to Project CoveragePlus << | Social Review Settings

Organization Admin

- Organization Detail
- License
- Reports
- Users
- User Groups
- Permissions
- Pick Lists
- Item Types
- Relationships
- Plugins
- Manage All Projects
- Social Review Settings
- IIRA Connector

Enable review authors to invite users outside their project

When review finalized state changes to: Finalized

Set: Requirements | Field: Status | To: Approved

When review finalized state changes to: [Dropdown]

Add Review Status Workflow (+)

Save Settings

- **Enable review authors to invite users outside their project** - Option that provides review authors with the ability to include users that are not included in the targeted project. By default this option is enabled.
- **Finalized** - Option to update one or more pick list fields on Items within a review upon completion.
- **Not Finalized** - Option to update one or more pick list fields on Items within a review upon reversal of a review completion.

Configure Finalized/Not Finalized Options

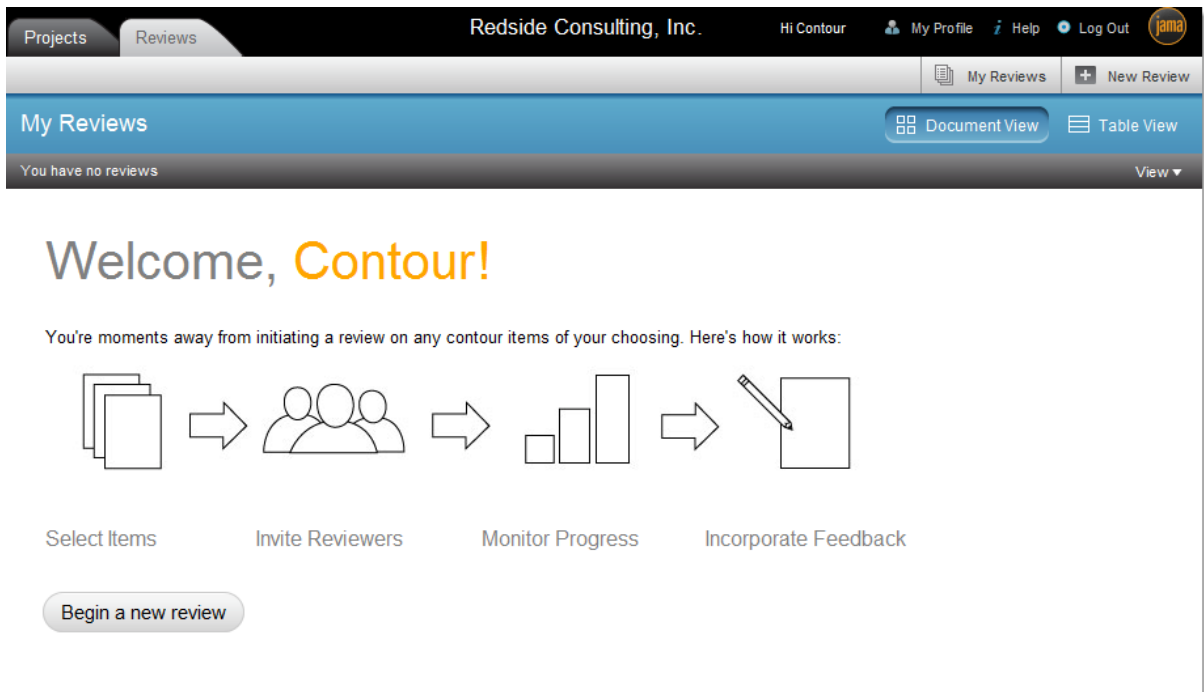
Each option provides the ability to configure the batch update of pick list values for Items within a review. The update will be done once a review is marked as finalized or not finalized by the author at the conclusion of the review. The most common scenario is to set all Items' status to "Approved". The Not Finalized action is used when a review needs to be re-opened and the Items within the review need to have their pick list values reset.

Authors do not have to use this option and can make manual updates to Items within a review.

- **When review finalized state changes to** - Describes the action that triggers the batch update.
- **Set** - List of Sets in the targeted project. Because a review may involve Items from one to many Sets in the project, multiple Sets can be configured for each action.
- **Field** - List of fields in the selected Set that are pick lists.
- **To** - The list of available values for the selected field.

2.2 Initiate a Review

Reviews can be created for any group of Items within a project with any user within Contour acting as a participant. The Review Centers provides a wizard to help authors create a review and invite the desired participants.



1. The first time a user enters the Review Center, they will be presented with a splash screen with the option to Begin a new review. Following visits will require the user to click on the New Review button located on the right side of the top Review Center.

Tip: A review can be started directly from Contour by right-clicking on a Set, Filter, Release or Baseline and selecting the Send to Review option.

Create Review

Review Settings | Select Reviewers | Customize Invitation

Project:
CoveragePlus

Items for Review:
Select items...

Review Name:
Review Name

Review Deadline:
09/06/2010 5:00 PM

Optional Settings:

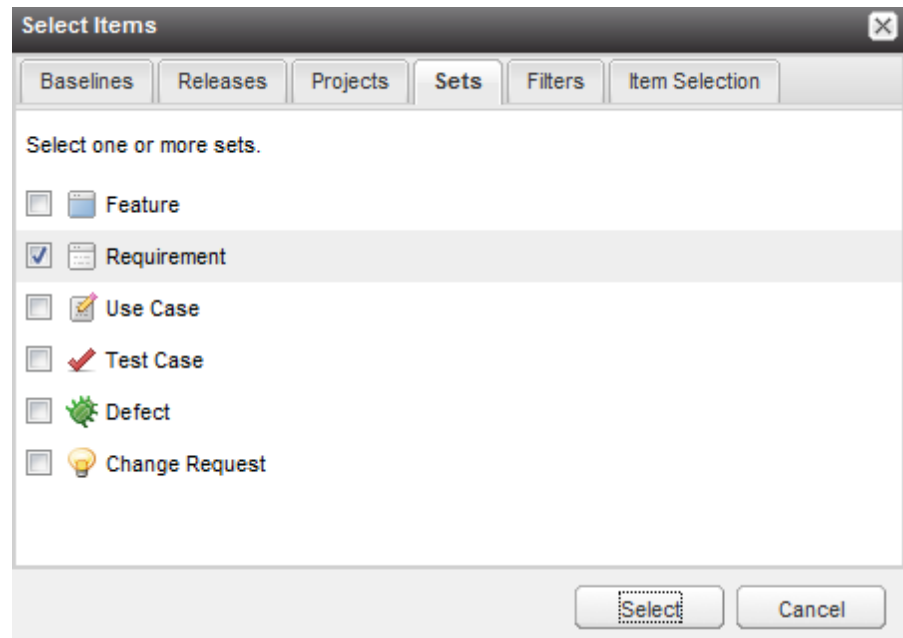
- Enable time tracking
- Notify me when a reviewer completes a review
- Enable Voting on Items:

Votes Per User: 10
Voting Label: Vote for Priority

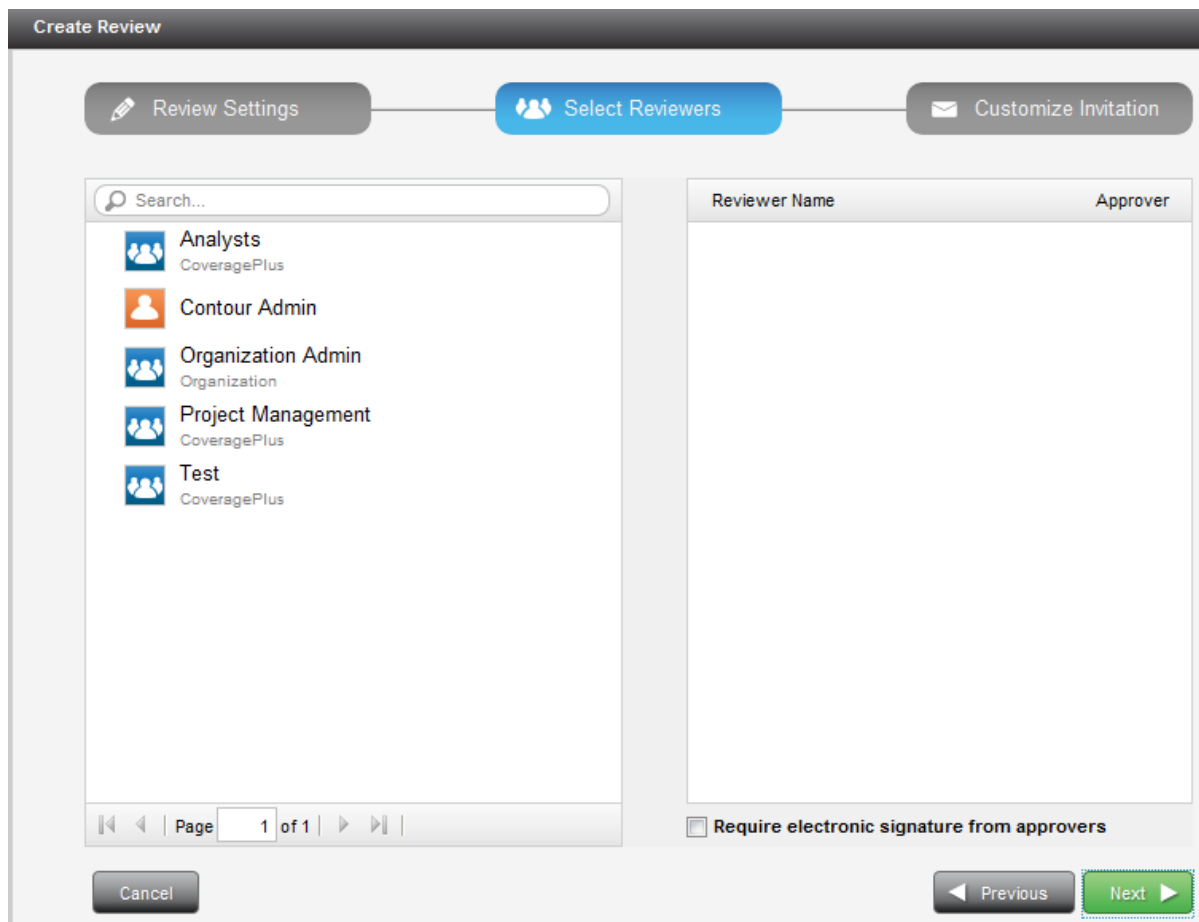
Cancel Next

2. Select the review options.

- **Project** - Select the project from the list of projects available.
- **Items for Review** - Select the Items to be included in the review. This selection can be by Baseline, Release, Project, Set, Filter or by individual Item selection.





- **Review Name** - Name of review that users will use to identify it from a list of reviews where they are participants. This value is defaulted by the options used to select the content, but it can be overridden by the author.
 - **Review Deadline** - This is the deadline provided to participants in the review. This deadline will also trigger a follow-up email when the deadline date is approaching.
 - **Enable Time Tracking** - This is an option that will track the amount of time each review spends within the review. The clock that tracks the time is visible to all users. Each user can manually update the time.
 - **Notify when reviewer marks review as complete** - Option to send notification emails to the author when a review indicates that they have completed the review.
 - **Enable Voting on Items** - Option that provides reviewers with the ability to vote on individual items. This can provide input on Item priority.
 - **Votes Per User** - The number of votes that each user has for the review.
 - **Voting Label** - Option to configure the label that described the voting option to participants.
3. Click the Next button to proceed.
 4. Select the review participants.



- Click on a group or user to add them to the list of review participants. Authors can select complete groups or optionally select individual users from a group.

Review Center Roles	Description
Author	This is the creator of the review. This user can define the detail included in the review, the participants and the configure the review options. By default the author can participate in the review as a commenter and make updates to Items based on feedback.
Approver	This role determines which users can mark Items or the review as approved. Conversely they can indicate that an Item needs more work or request a new version of the review is publish.
Reviewer	This role allows users to view a review, make comments and vote on Items.

- Configure Approvers** - Option to indicate which users are required to provide approval. Users that are not approvers will have the opportunity to participate in the review, but will not have the option to indicate Items are approved or require more work.

Reviewer Name	Approver
x Remove all users	
x  Contour Admin	<input type="checkbox"/>
x  Steve Smith	<input checked="" type="checkbox"/>

- **Require electronic signatures** - Option that requires digital signatures from users configured as Approvers.
6. Click Next button to review the invitation email or the Previous button to go back to the first dialog in the wizard.
 7. Review the invitation email and make any necessary updates. The subject and instructions can be edited. The email will be sent from the review author.

Create Review

Review Settings — Select Reviewers — Customize Invitation

Subject:

From: Contour Admin

To: Reviewers

Review Instructions:

http://localhost:8080/contour2_9_7/review.req#/r:REV-??

The due date to complete this review is Monday, September 6th at 5:00 PM

Thank you,
Contour Admin

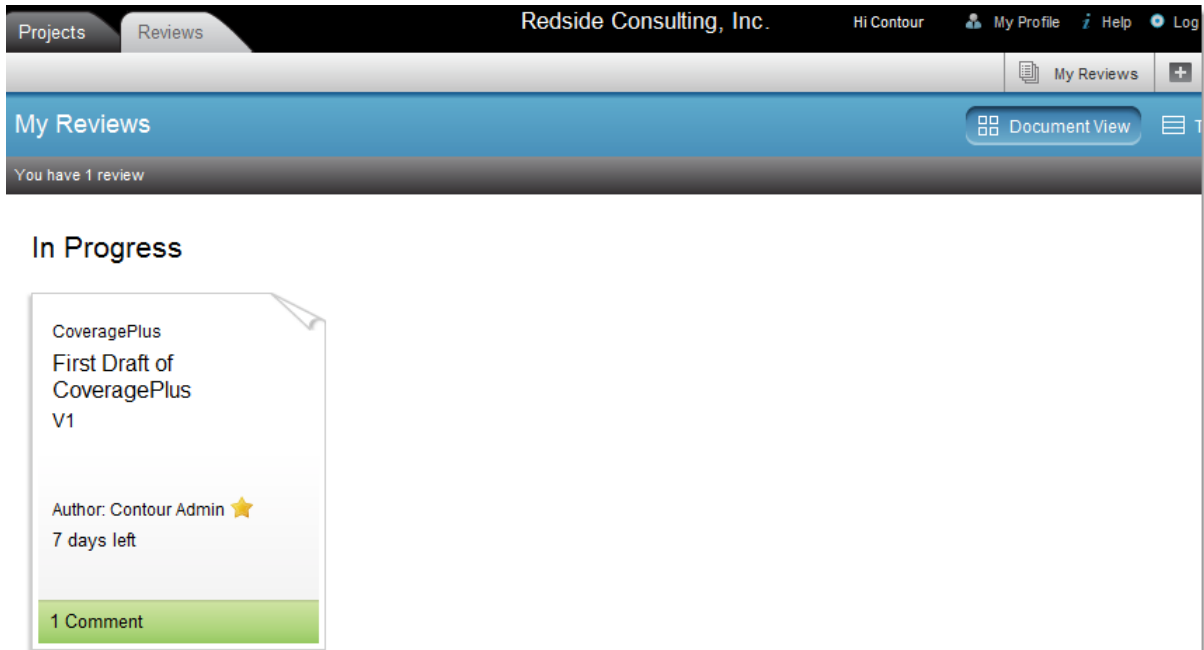
Cancel
Previous
Begin Review

8. Click on the Begin Review button to complete the review wizard.

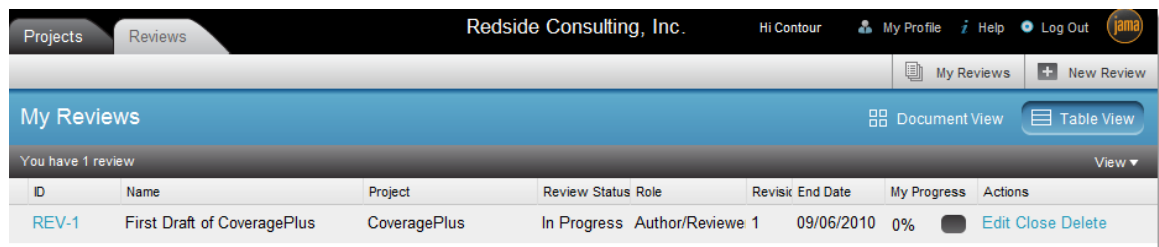
2.3 Gather Feedback

Read the Review

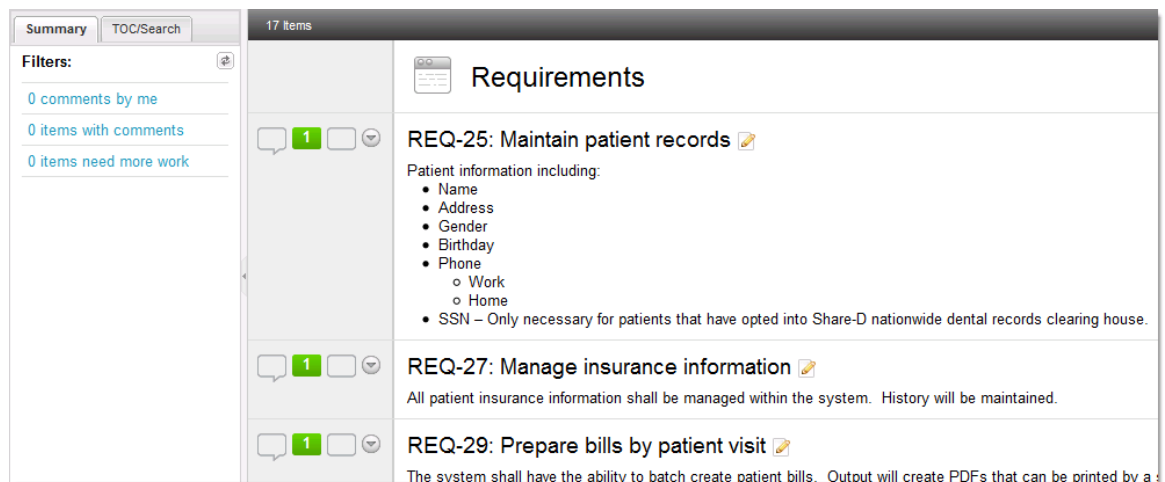
Once a review has been created, the participants will have the opportunity to read through the items and make comments as necessary.



The participant has the option to click on the review to view its detail or review a list of available reviews by clicking on the Table View button.

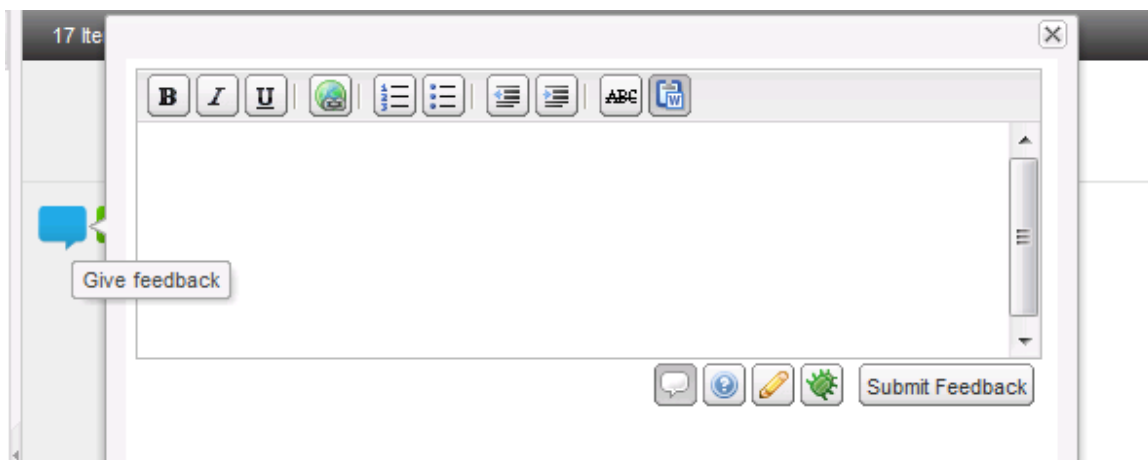


After selecting the review, the user can scroll through the document to read the included items.



Comments

Commenting can be done by clicking on the balloon icon next to each Item.



Categorize the comment to help the author and participants understand the and categorize the feedback. Click on the Submit Feedback button to save the comment.

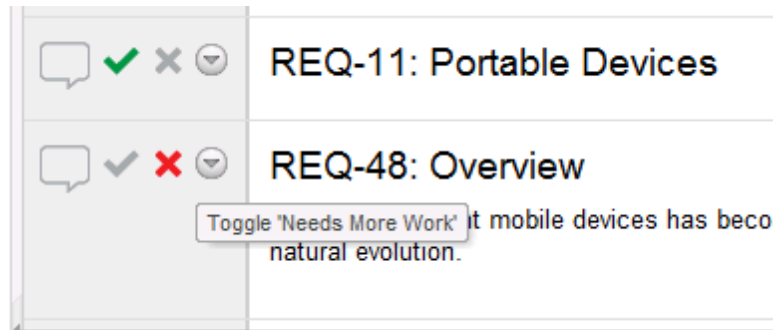
- **Comment** - To indicate a general comment, click on the button with the comment balloon icon. This is the default option.
- **Question** - To indicate a question, click on the button with the question mark icon.
- **Proposed Change** - To indicate a proposed change, click on the button with the pencil icon.
- **Indicate an Issue** - To indicate an issue, click on the button with the bug icon.

Note: Authors can Acknowledge a comment. This provides authors with the ability to work through comments in a review and indicate which comments have been read. The commenter will know that a comment has been read.

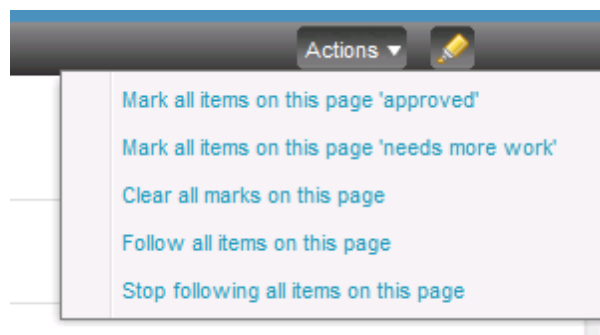
Approve/Needs More Work

Participants that have been configured to be Approvers have the ability to mark each Item as Approved or Needs More Work. To Approve an individual Item click on the check mark icon. Conversely, the X icon will allow the you to indicate that an Item "Needs More Work".

Note: The check mark button available to reviewers (non-approvers) is only available as an option to indicate that an Item has been reviewed.

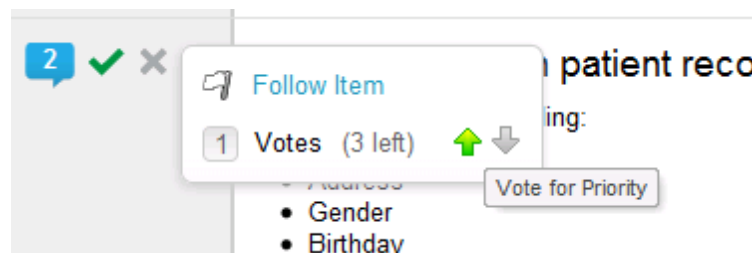


Click on the Actions menu and you can mark all Items in the review as "Approved" or "Needs More Work".



Voting

Authors have the option to provide review participants with the opportunity to vote on Items. These votes can be used to help define the priority of Items. The amount of votes is configurable by the author. The participant can give multiple votes to a single Item. Votes can be applied by clicking on the button with the down arrow button to access the voting option. Clicking the upward arrow applies a vote for the Item and the downward arrow takes back any votes that have been applied to the Item by the user.



Votes can also be applied when viewing an Item's detail.

Maintain patient records

Patient information including:

- Name
- Address
- Gender
- Birthday
- Phone
 - Work
 - Home

2.4 Monitor Progress

Once a review is underway, the author or participants can monitor the progress by viewing the comments and statistics about how many Items have been reviewed.

Filter My Comments and Votes

Users can filter the Items in the review to shown only those Items that the participant has commented on, voted on or is following. Clicking on any of the filtering options will reduce the list of Items to only show those that fit the filter's criteria.

Note: To return to the full list, click on the X button that is located at the top of the list of Items.

Feedback

The Feedback view is similar to the comments filter, but with a focus on the comments. From this view a participant can target comments by their type (Comment, Question, Issue or Proposed Change).

Search...

- All (2)
- Open (2)
- Mine (2)
- Review (1)
- Important (1)

Add your comment...

REQ-45 Overview:

Contour Admin added the comment:
Is this the correct name?
 Author 3 minutes ago - Edit - Delete - Reply - Acknowledge

This Review:

Statistics

As a review progresses, the Review Center provides statistics about the participants progress.

Initiator: Contour Admin

Review Team: 4

Approvers: 3

Voting Subject: Vote for Priority

Start Date: 08/31/2010

End Date: 09/07/2010

Approvers
Number of Approvers: 3

- Approved (1)
- Needs Work (1)
- Not Finished (1)

Reviewers
Number of Reviewers: 1

- Finished (0)
- Not Finished (1)

Each participant will be listed with graph depicting the amount of Items they have reviewed. The graph for approvers will indicate how many Items have been approved or marked for more work.

Reviewer Progress [Details View](#)

Name	Role	Time Spent	Progress
Kristi Wolf	Approver	1:19	83%
Tyler Doans	Reviewer	0:04	72%
Sean Adley	Reviewer	0:31	0%

Page 1 of 1 | Show: 20 | Displaying 1 - 3 of 3

Clicking on the Detail View link will show the progress numerically as well as the participant's overall review status.

Reviewer Progress [Progress View](#)

Name	Role	Progress	Status	Comments	Votes	Approved	Needs More Work	Reviewed	Time Spent
Contour Admin	Approver	100%	Approved	1	0	20	0	-	1:03
Ichiro Choi	Approver	100%	Requested Item	1	0	18	2	-	0:03
Derwynn Harris	Approver	0%	In Progress	0	0	0	0	-	0:00
Ben Johnson	Reviewer	0%	In Progress	0	0	-	-	0	0:00

Page 1 of 1 | Show: 20 | Displaying 1 - 4 of 4

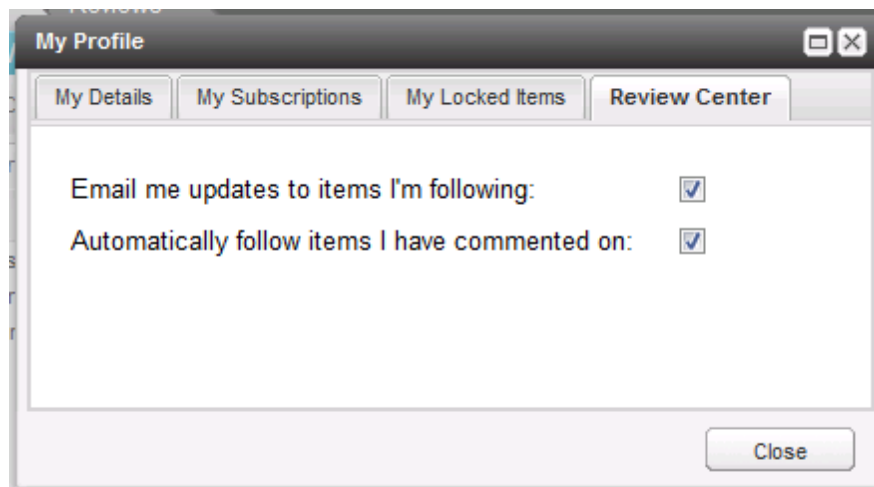
The last list on the Stats page shows the review's progress for each individual Item.

Item Progress

ID	Name	Comments	Votes	Approved	Needs More Work	Reviewed
REQ-25	Maintain patient records	2	2	1	0	1
REQ-27	Manage insurance information	0	0	1	0	1

Notifications

You can configure if you want to receive email notifications about items within reviews where you are a participant. These settings are accessible via the My Profile link.



The notifications are sent when an Item you are following is commented on.

- **Email me updates to items I'm following** - When enabled, an email will be sent whenever an Item you are following is commented on.
- **Automatically follow items I have commented on** - When enabled, the Review Center will set the follow Item flag each time you comment on an Item.

2.5 Incorporate Feedback





Authors can take the participants' feedback on review Items and incorporate their comments.

1. First click on an Item's name to view its detail.
2. Click on the Edit Item link.

Maintain patient records

Patient information including:

- Name
- Address
- Gender
- Birthday
- Phone
 - Work
 - Home

-  [Edit Item](#)
-  [View Edits](#)
-  [Follow Item](#)
-  [Compare With Prior](#)

3. Make the appropriate updates.

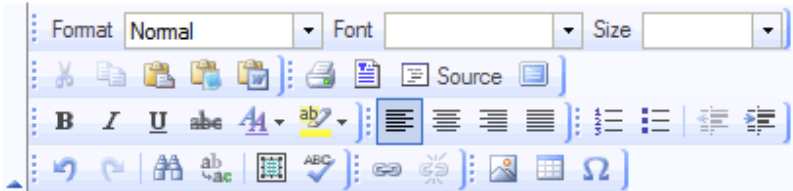
Compare Item

ID: REQ-25

*Name: Maintain patient records

Description:

Format: Normal Font: Size:



Patient information including:

- Name
- Address
- Gender
- Birthday
- Phone
 - Work
 - Home
- SSN – Only necessary for patients that have opted into Share-D nationwide dental records clearing house.

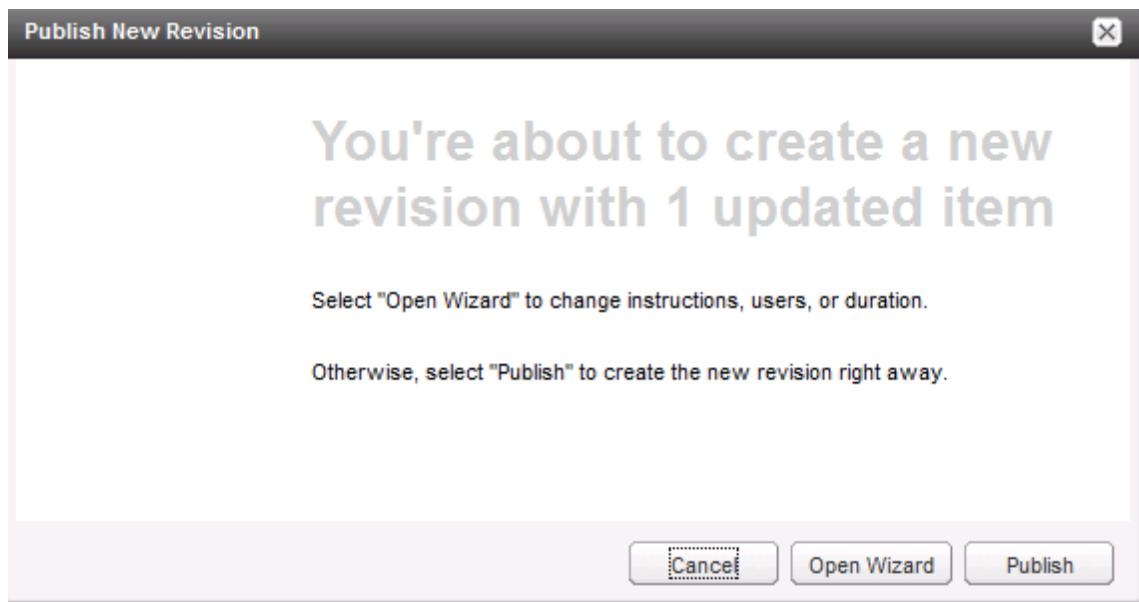
Assigned:

4. "Save and Close" the edit.
5. Continue through the comments and make all the necessary updates.

Release: 1.0 - V3 Review Feedback Stats Tools

1 item was updated since V3 was published. Publish Updated Revision

6. After an update is made, the Review Center will indicate that changes have been made. The participants will continue to see the Items in the review as they were prior to the updates. As the author, you need to publish your changes into a new version.



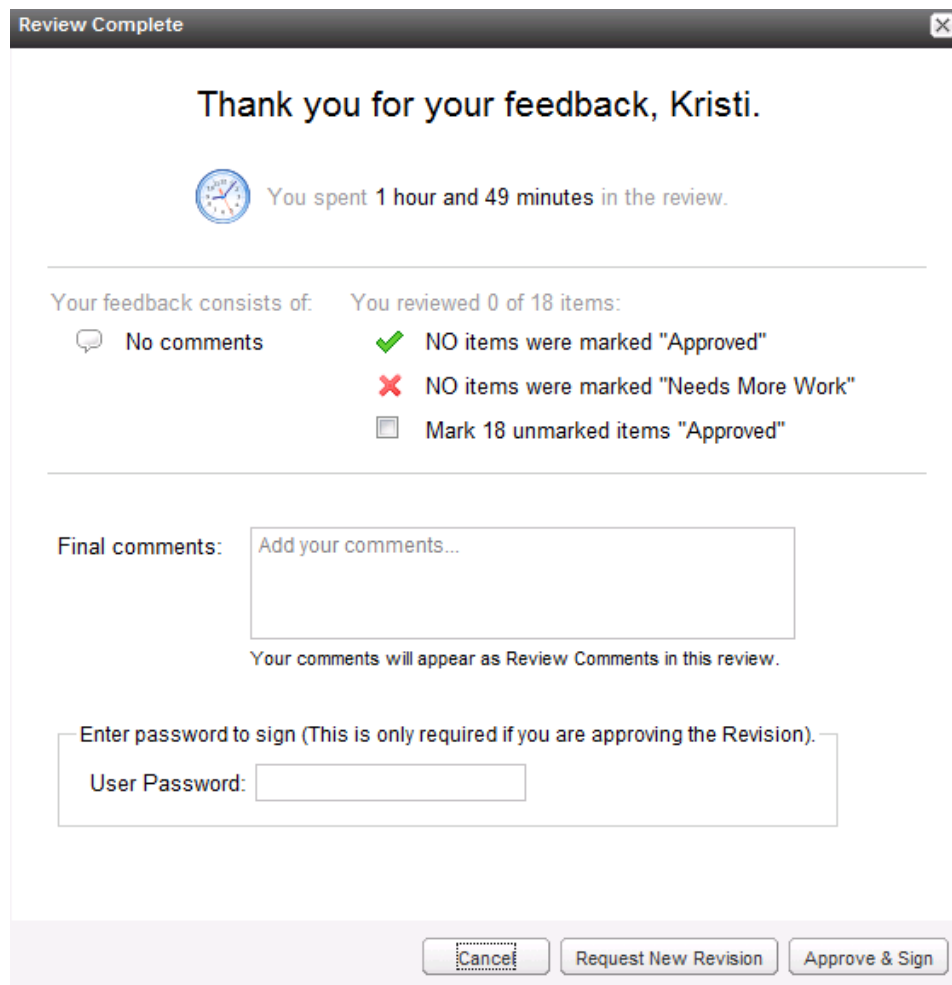
7. The Review Center will provide the author with the ability to revisit the wizard where changes can be made to the review. Clicking on Publish will update the review for all participants and they will now see the changes that have been made. An email notification will be sent to all participants to inform them that a new version of the review is available.

2.6 Complete Review

Once a participant is done with the review, they have the option of indicating that they are complete. This isn't required but it helps the author understand review progress. This can be done from the Summary tab within the Review view or from the Tools menu.


Approvers

When an author indicates that they are done with the review, the Review Center will present the author with a dialog where unmarked items can be marked as Approved, comments can be made, and when configured, apply a digital signature. If necessary, they can also request a new version of the review.






Review Complete

Thank you for your feedback, Kristi.

 You spent 1 hour and 49 minutes in the review.

Your feedback consists of: You reviewed 0 of 18 items:

-  No comments
-  NO items were marked "Approved"
-  NO items were marked "Needs More Work"
- Mark 18 unmarked items "Approved"

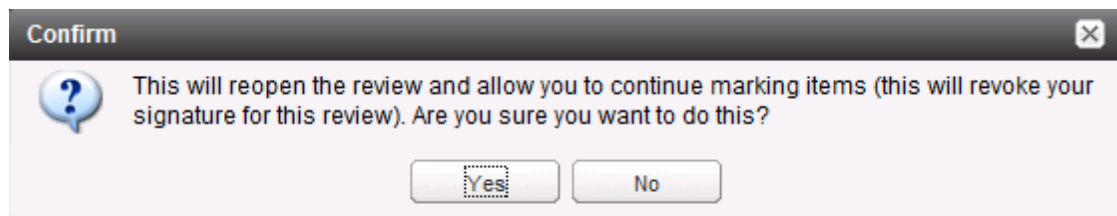
Final comments:

Your comments will appear as Review Comments in this review.


Enter password to sign (This is only required if you are approving the Revision).

User Password:

Note: Approvers can reopen their review after approval. If a digital signature was required, it will be revoked.

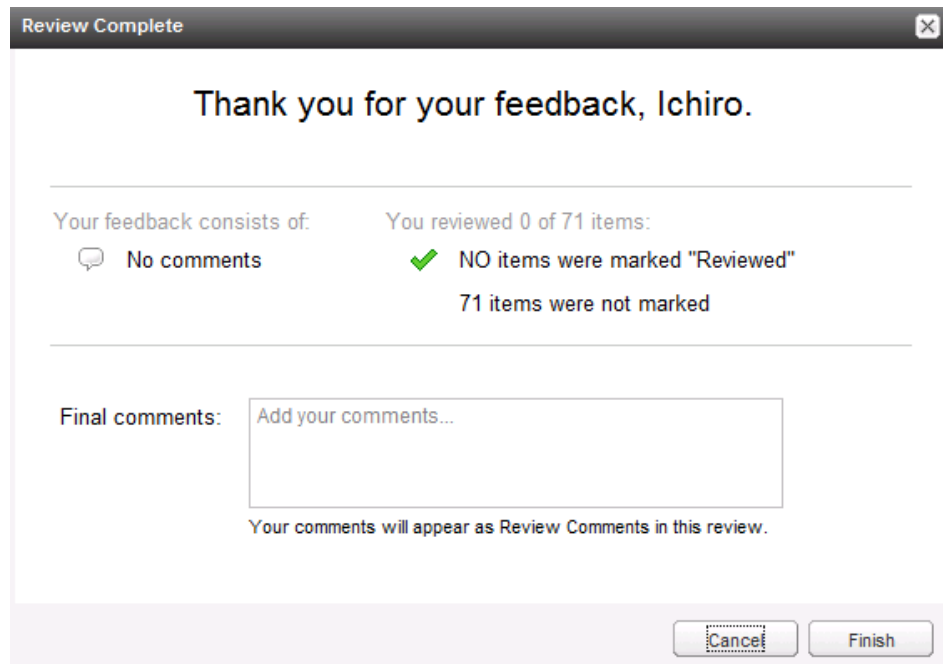


Confirm

 This will reopen the review and allow you to continue marking items (this will revoke your signature for this review). Are you sure you want to do this?

Reviewers

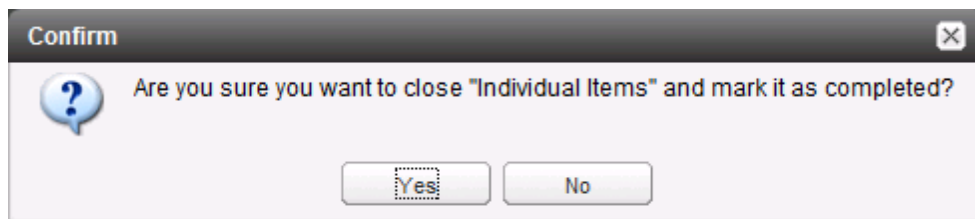
Reviews will get a similar dialog, but with fewer options.



Note: The reviewer can reopen their review if necessary.

Author

The author has several options when a review is complete. The first open is to close the review.

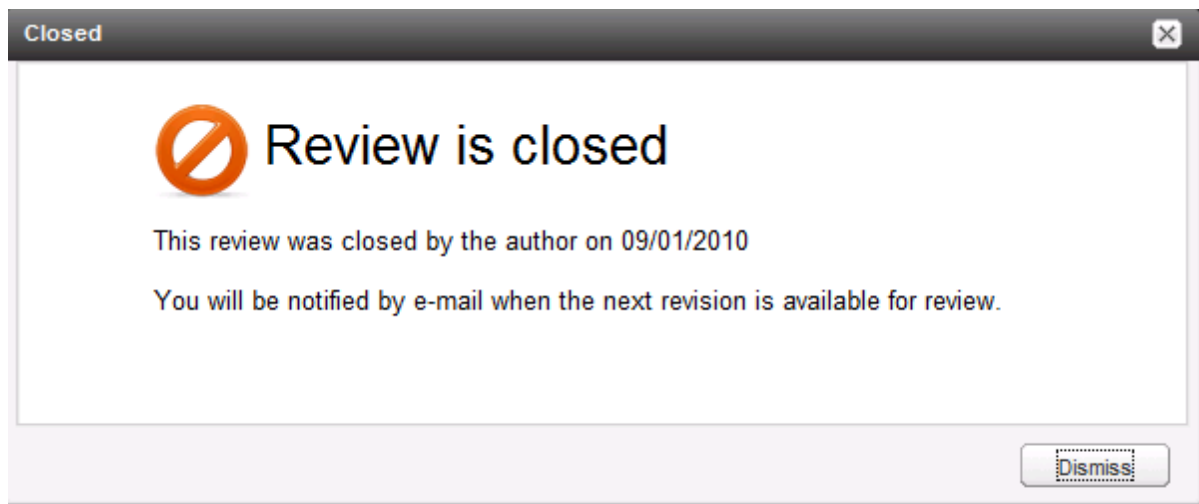


The options for a closed review will be displayed across the top of the review.



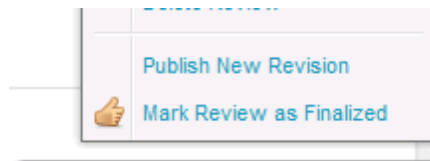
- **Recover** - Reopens the review.
- **Archive** - Removes the review from the primary list of reviews.
- **Publish New Revision** - Reopens the review with the option to update the configurations via the wizard.

Participants that access a review after it has been closed will receive a dialog indicating that the review is closed.

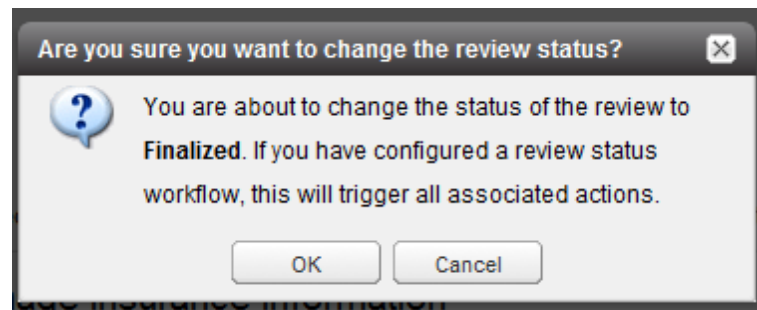


Mark Review As Finalized

Authors have the option to apply [batch update rules](#) to Items in a review once the review is complete. These rules are configured by the Organization Admin.



The option is available in the Actions menu.



A confirmation dialog will warn the author that this will make changes to the Items in review.

2.7 Review Center FAQ

Here are some of our most frequently asked support questions:

Review Roles

Q: What are the different roles within a review?

A: There are three roles within a review: (1) author – creates and manages a review; (2)

reviewer – can participate in a review to provide feedback, a reviewer’s feedback is optional and doesn’t include approval to complete the review; and (3) approver – a reviewer with the added authority to approve/reject items – usually applies to managers, project owners and/or customers who need to sign-off on requirements before development starts. Electronic signature is an optional capability you can add to an approver’s review process to document the official sign-off for auditing purposes.

▣ Feedback Types

Q: What are the different types of feedback?

A: There are 4 types of feedback reviewers can provide: (1) comment – general feedback; (2) question – if you need clarity on an item you’re reviewing; (3) proposed change – if you have a proposed edit for the author to make; and (4) issue – can flag a comment as an issue if you identify a problem.

▣ Activate Review Center Trial

Q: How can I activate the Review Center after upgrading from an older version of Contour?

A: In the "Administration" mode of Contour, select the "License" section in the left navigation pane. Click "Activate Review Center" in the table under "Modules".

▣ Review Authors

Q: Who can create a review?

A: Any Contour user who has read/write permissions for the requirements and other items being selected within a project for a review can be an author. From a licensing perspective, these can be either Named or Floating users. Collaborator users can not author a review because they are limited to read-only permissions within Contour. However, Collaborators can participate as a reviewer or an approver in a review.

▣ Review versus Revision

Q: What’s the difference between a review and revision?

A: A review represents the entire process of gaining consensus and approval of the requirements. Within a review, you may have multiple revisions. If edits are made per the feedback received within a review, then the author updates the review with a new revision and sends out an alert to the review team. The process continues until all items in the review are approved.

▣ Invite External Users

Q: Can external stakeholders that aren’t employees of my organization participate?

A: Yes, but this isn’t open to everyone. For data security purposes, all participants in a review must be users set-up within Contour. This prevents against unintended people receiving an invite to access requirements that are part of a review. To leverage the Review Center with your

external customers or other stakeholders, we have introduced a new license type called Reviewer license.

▣ **Reviewer License**

Q: What is a reviewer license?

A: The new reviewer license allows a user to participate in a review, but he or she does not have access to the Projects tab within Contour. This is useful for internal and external stakeholders for a specific set of requirements or project that needs their feedback, review and approval.

▣ **Review Center Access**

Q: Who has access to Review Center?

A: When purchased, Review Center is available for all four license types within Contour. These include:

1. Named – read/write capabilities for single person
2. Floating – read/write capabilities shared with multiple people, with only one logged in at a time
3. Collaborator – read-only access for single person
4. Reviewer – access to the Review Center only for a single user

▣ **Voting on Items**

Q: What's the voting feature for?

A: Votes are an optional feature for reviews. If you want to allow reviewers to apply weight to their feedback to emphasize priority or some other characteristic, the author can add that when configuring the review settings. The number of votes per review are configured by the author during setup.

▣ **Time Tracking**

Q: What does the time tracking feature do?

A: It provides a mechanism for the author to monitor the time a review takes to complete.

▣ **Time Tracking - Changing Information**

Q: Can I update the time I've invested in the review?

A: Time tracking can be modified by the individual reviewers if needed to more accurately represent the real time invested in the review. This editing capability is useful if you leave a review open while you attend a meeting or get distracted by something else mid-review.

▣ Viewing Important Comments

Q: How can I see items flagged as important within a review?

A: As an author, you can mark a comment or item as important in order to highlight and filter specific feedback. All participants can view the important items via the preset filter on the Feedback page called "Important".

▣ Electronic Signatures

Q: What does an electronic signature represent?

A: For organizations that need official sign-off for compliance or auditing purposes, you can configure a review to have approvers add their electronic signature as part of the final workflow when 100% approved. When authoring a review, there is an option in the set-up wizard to "Require electronic signatures from approvers."