Review Management Step-by-Step Guide

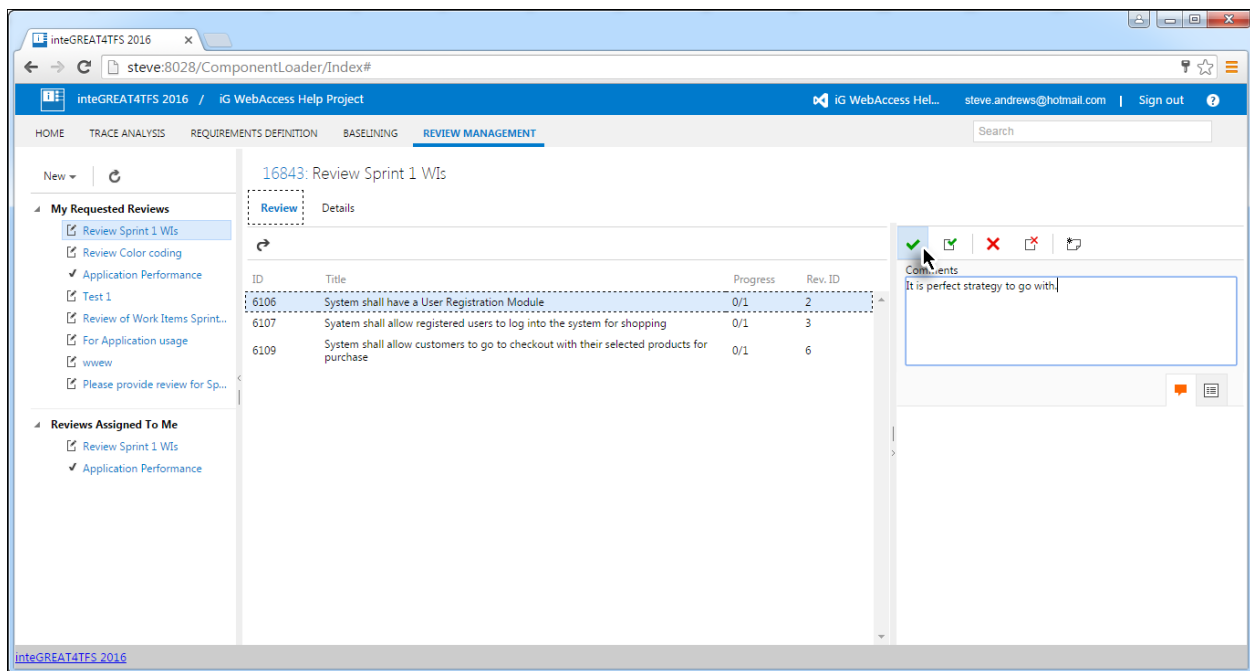## CONTENTS

OVERVIEW

The Review Management section of inteGREAT4TFS is the module that is used to manage the reviews regarding Work Items of a Team Project. Users can ask other users for reviews and also provide reviews assigned to them. This guide demonstrates how to use the Review Management module in inteGREAT4TFS.
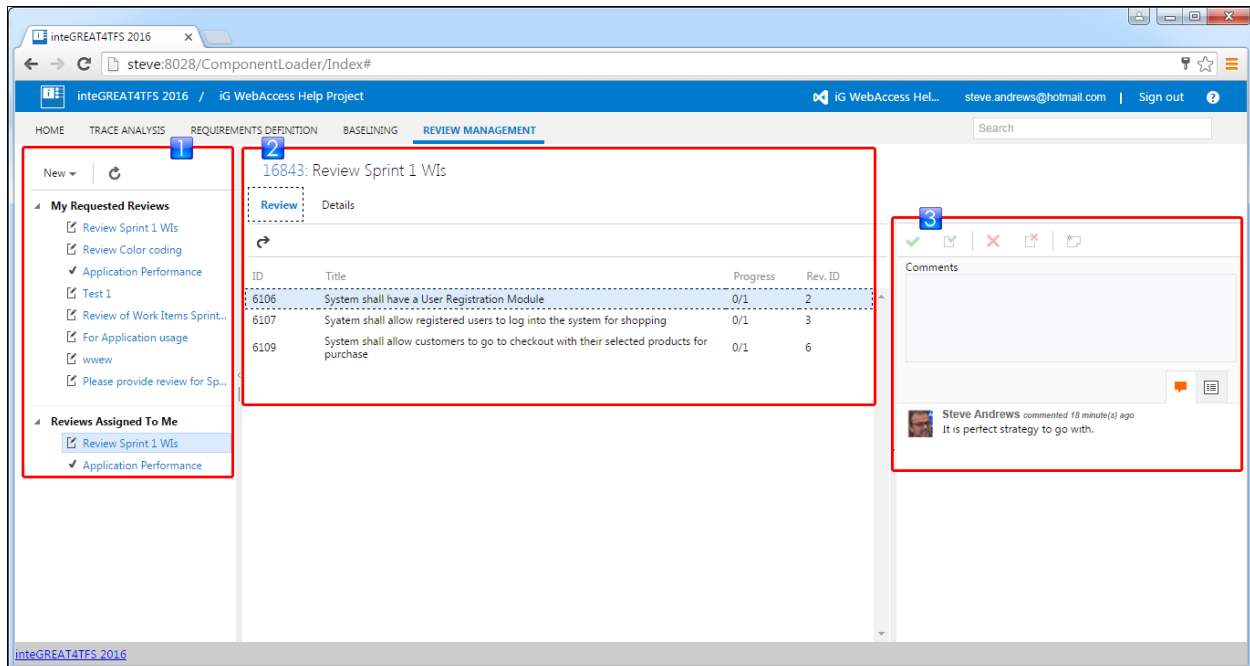

KEY TAKEAWAYS

Users will learn how to perform the following tasks from this tutorial:

- Invoke the module
- Create a new review request
- Respond to an assigned request

REVIEW MANAGEMENT UI

The Review Management User Interface can be divided into three panels as shown below:

- Review List Panel
- Work Item Grid
- The Response Panel

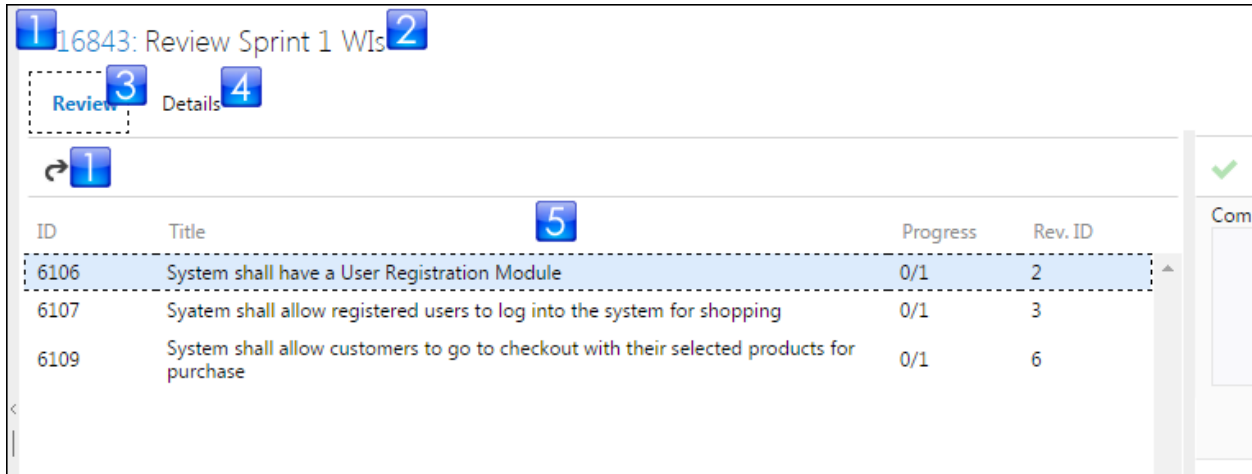|		This panel is used to:
1	**Review List Panel**	• view the list of review requests generated by/assigned to the user. • generate new review requests
2	**Work Item Grid**	This section shows the Work Items in the currently selected review request. Users need to select a Work Item in order to view the response
3	**Response Panel**	This section is used to view/provide responses

REVIEW LIST PANEL
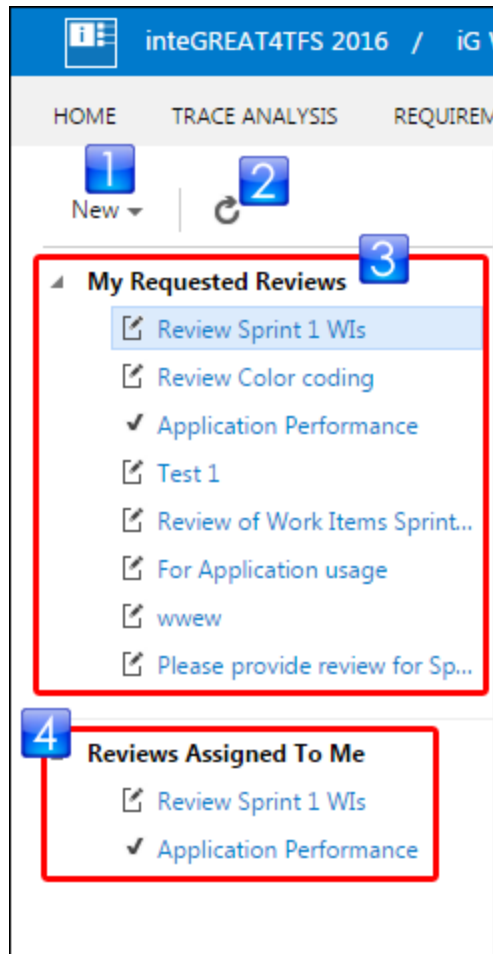
1	**New**	Used to create a new Review Request
2	**Refresh**	Refreshes the Review Request list
3	**My Requested Reviews**	Shows a list of the Review Requests created by the current user
4	**Reviews Assigned To Me**	Shows a list of the Review Requests assigned to the current user

LEGENDS

☑	**Review Request In Progress**
✓	**Completed Review Request**

WORK ITEM GRID

|			
1	**Open in Web Access**	Opens the selected Work Item in a separate window. Both the Hyperlink Work Item ID and the ↱ lead to the same window.
2	**Review Request's Name**	The title of the Review Request
3	**Review Tab**	Used to view/provide review
4	**Details Tab**	Used to show the metadata about the review request such as **Creation Date, Created by, Due Date** etc.
5	**Work Item List**	Shows a list of the Work Items of the selected Review Request

RESPONSE PANEL
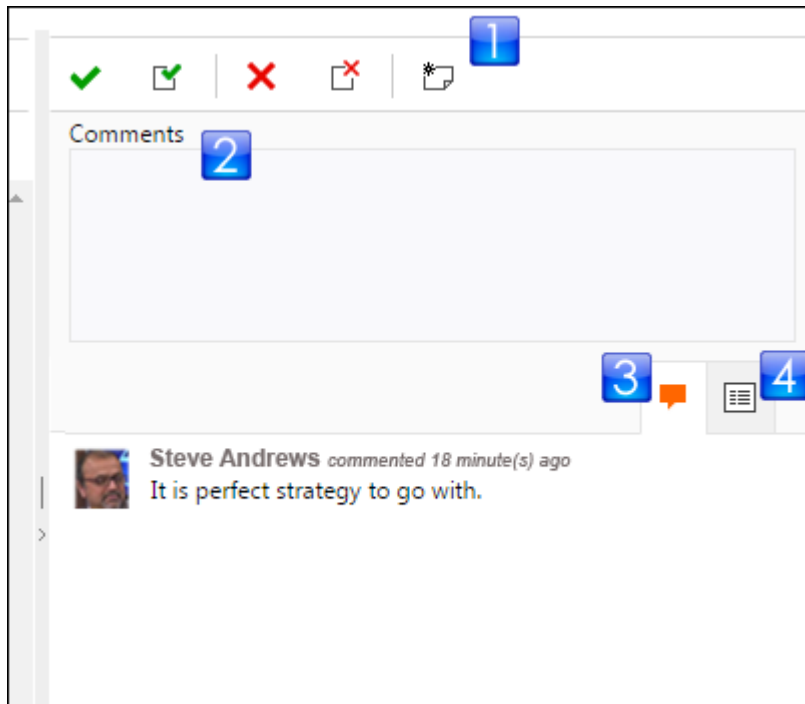
|			
	Response Toolbar	Contains options to accept / reject / post comment	
	Comments Box	Used to give response against the selected Work Item	
	Comments Tab	Selecting this tab shows a list of responses given against the selected Work Item	
	Details Tab	Selecting this tab shows the details of the selected Work Item	

RESPONSE TOOLBAR

✔	**Accept**	Accepts the Work Item
☑	**Accept All**	Accepts all Work Items in the Request
✖	**Reject**	Rejects the Work Item
☒	**Reject All**	Rejects all Work Items in the Request
🗒	**Add Comment**	Posts the comment added in the Comments Box

INVOKING THE MODULE

In case another module is selected, the user can select the Review Management function by clicking on the Review Management option (below the Team Project Name).
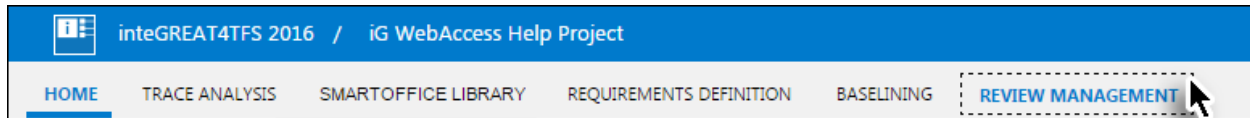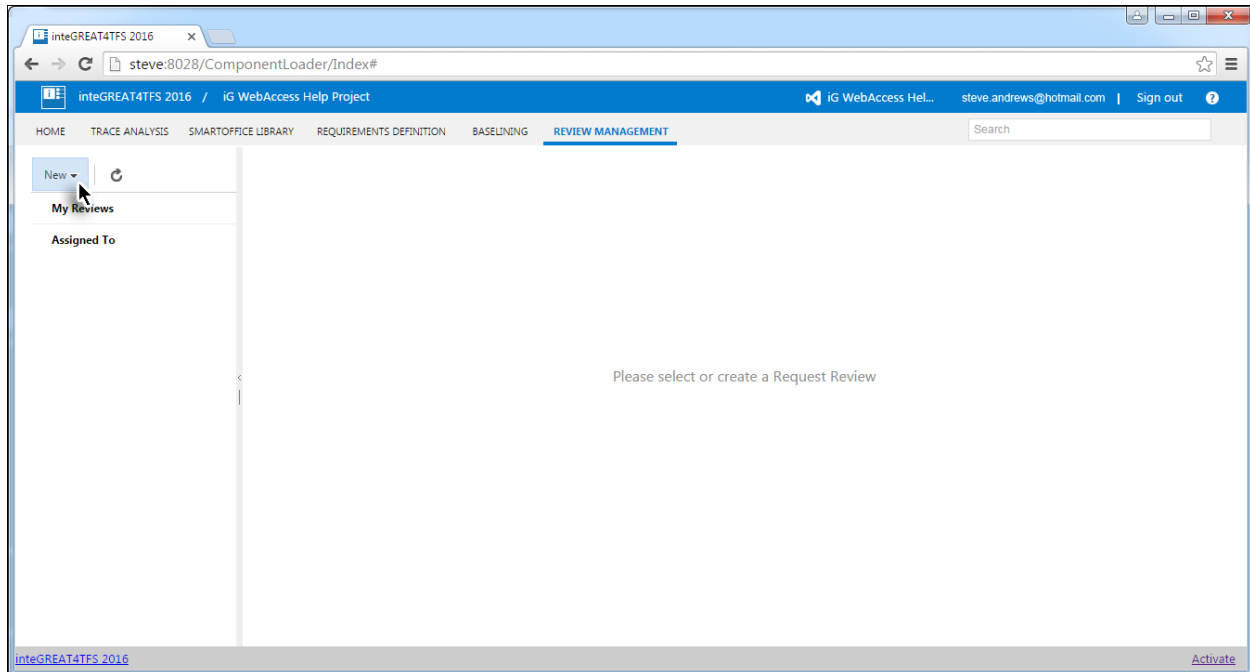

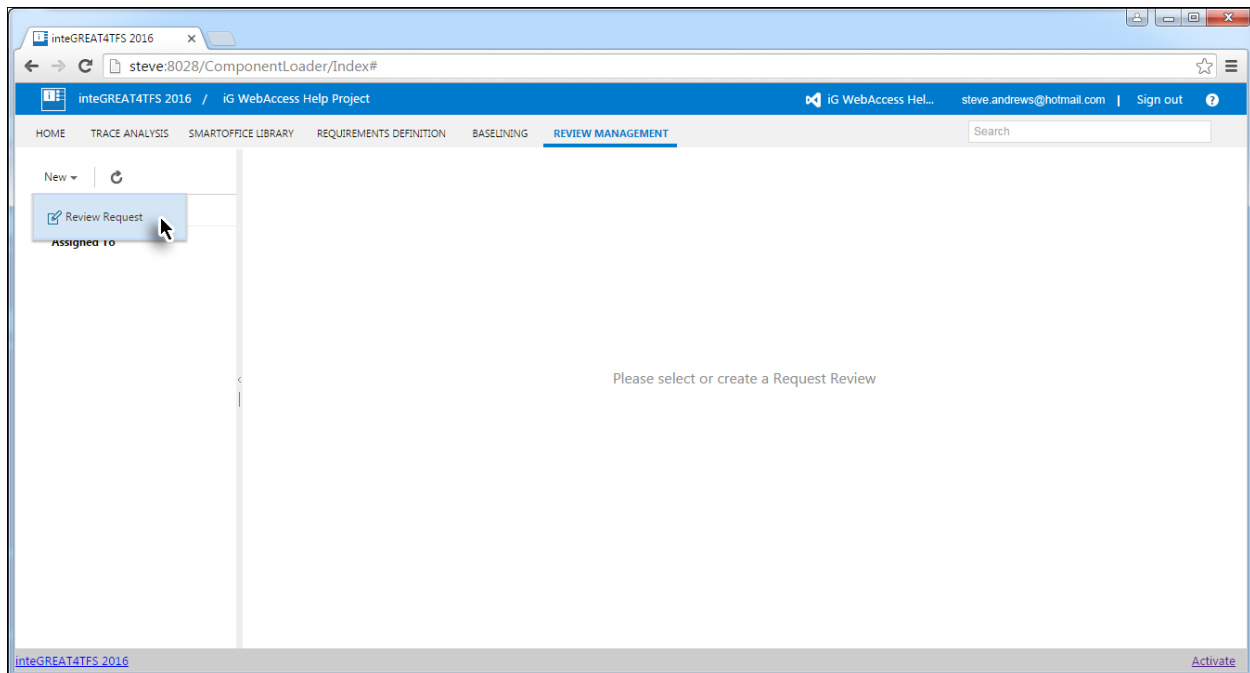The landing page of Review Management is displayed.
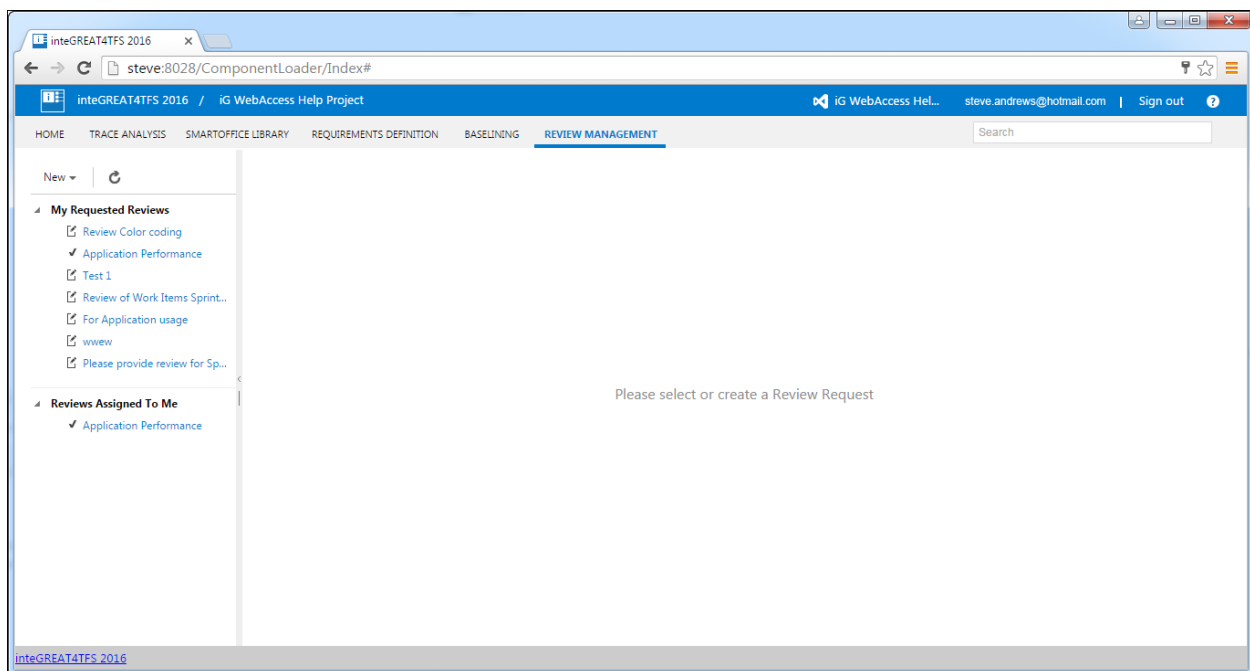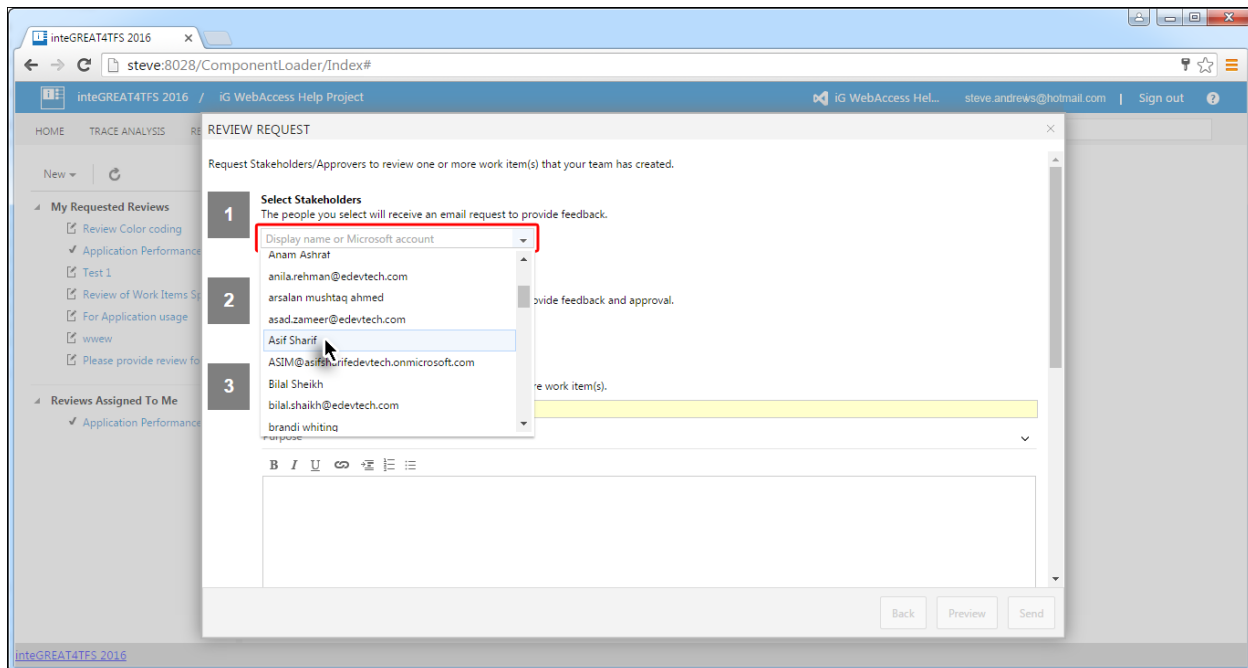
CREATING A REVIEW REQUEST

1. Click the **New** option.

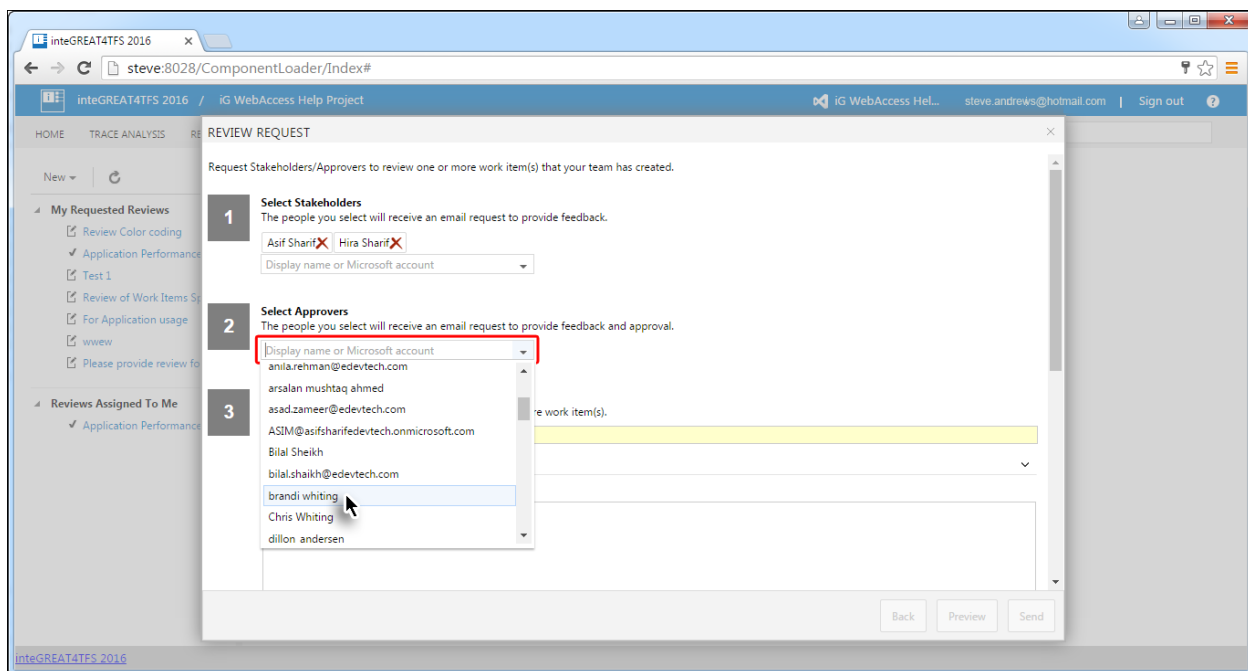2. Click the **Review Request** option from the drop-down menu.

3. Select the desired 'reviewers' from the drop-down list.

4. Similarly, select the desired 'approvers'.

Note: **Reviewers** only provide comments while **Approvers** can only approve/reject.

5. Enter appropriate subject for the review request.

6. Scroll down to get to the other steps in the window.

7. Provide a purpose for the review (optional). Alternatively, collapse the section by clicking on the down arrow on the far right.

8. Click the **Add Work Items** button.

9. Run the relevant query.

10. Select the desired Work Items (for which the review is desired) and click the **Add Work Item(s)** button.
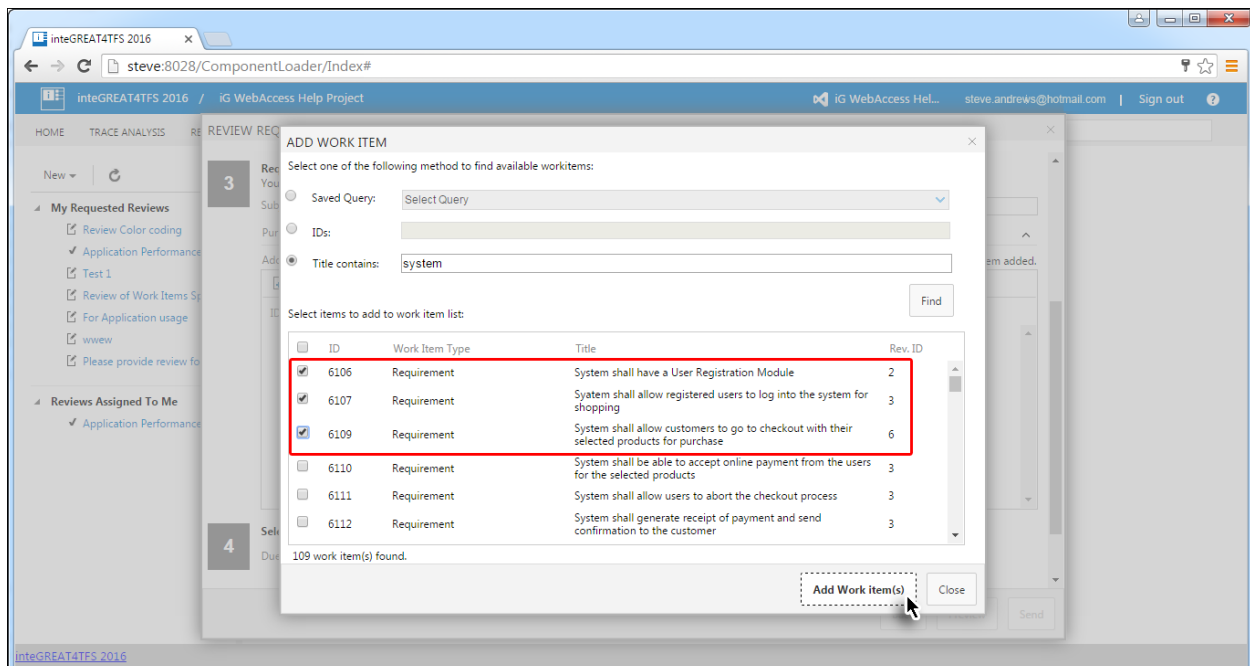
11. Set the **Due Date**.

12. To preview the request, click the **Preview** button.

The Preview is displayed.
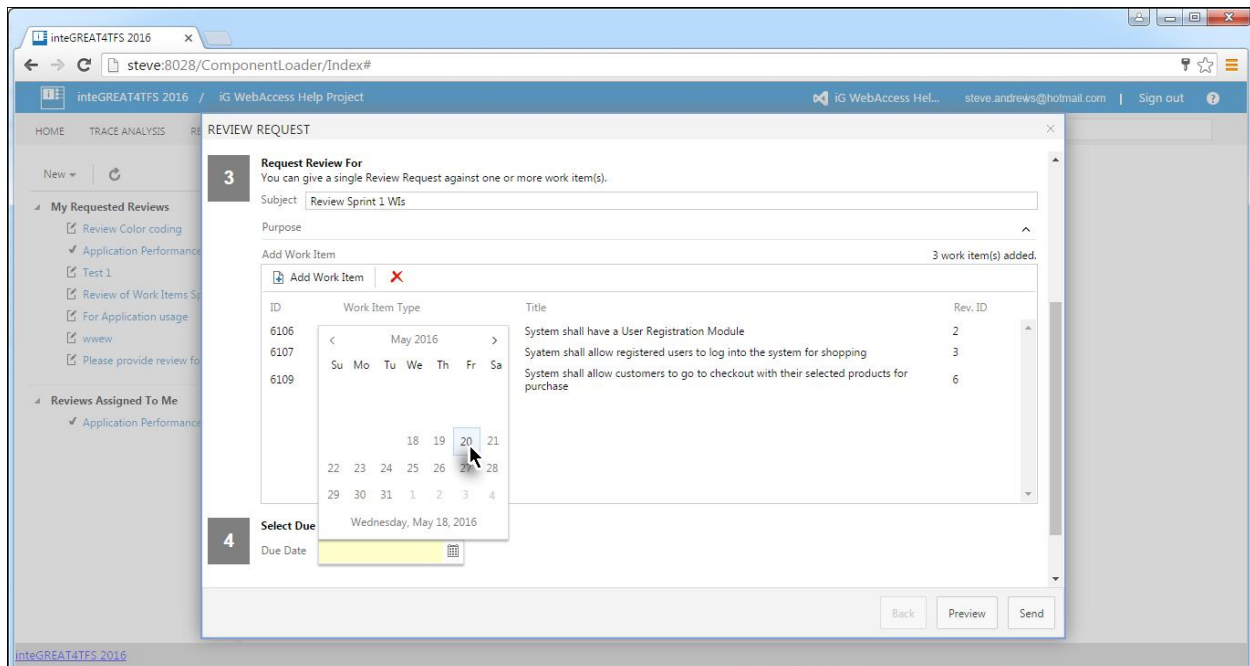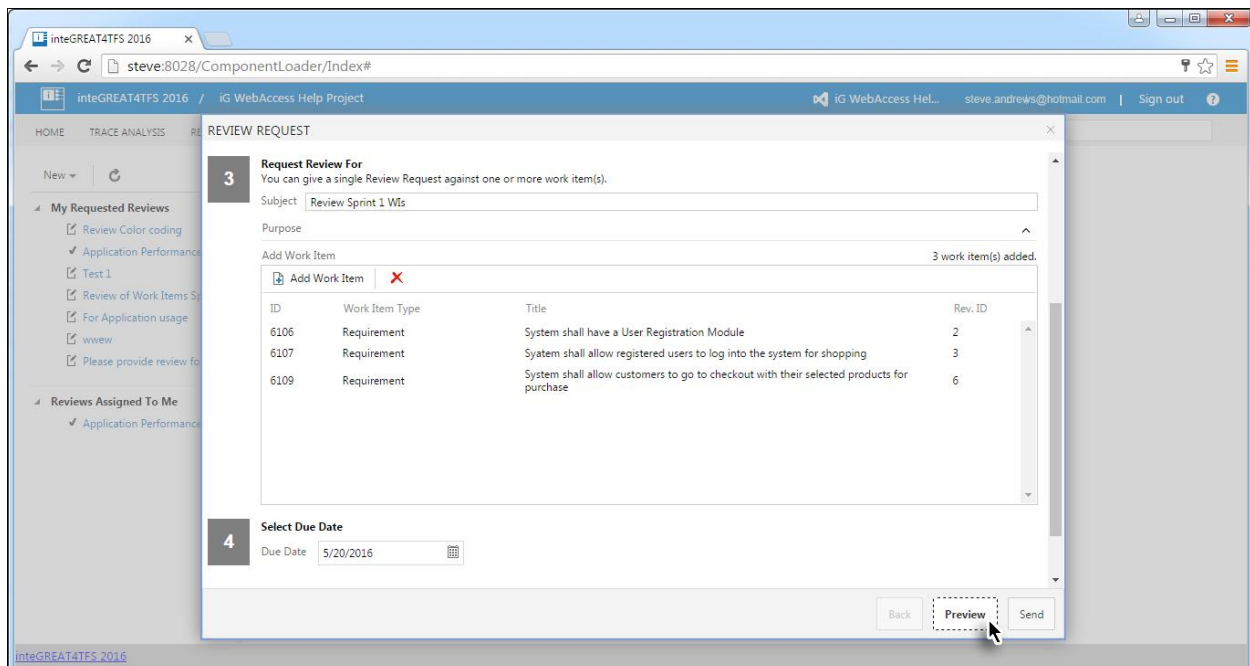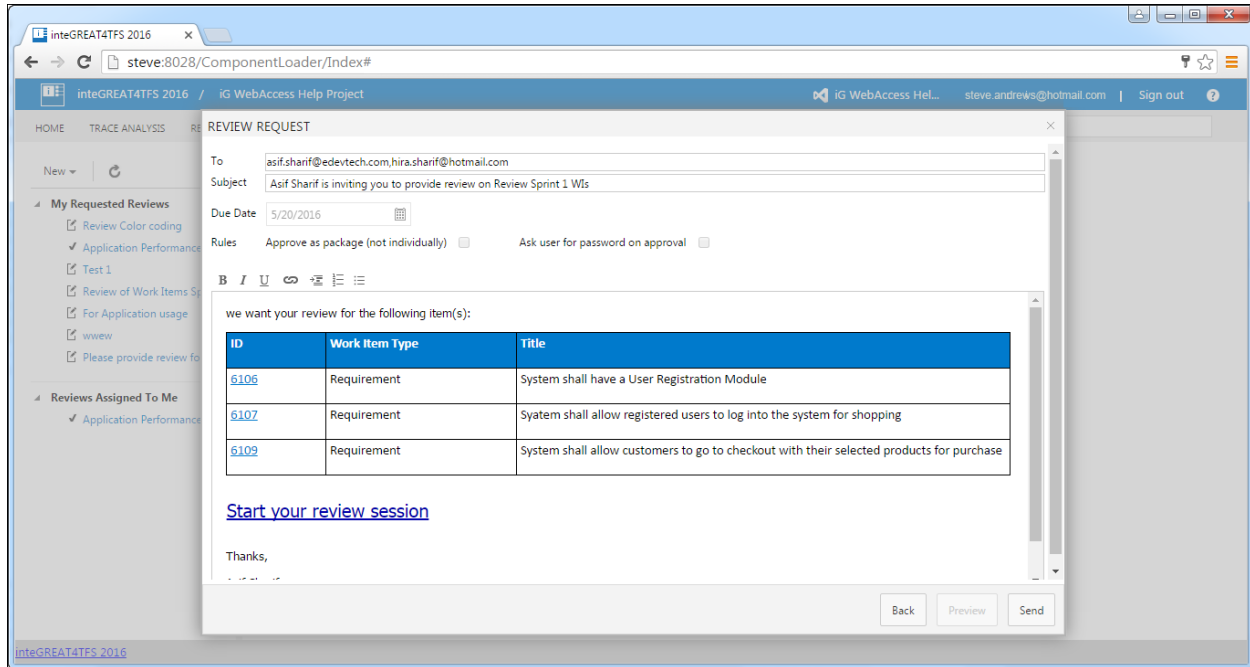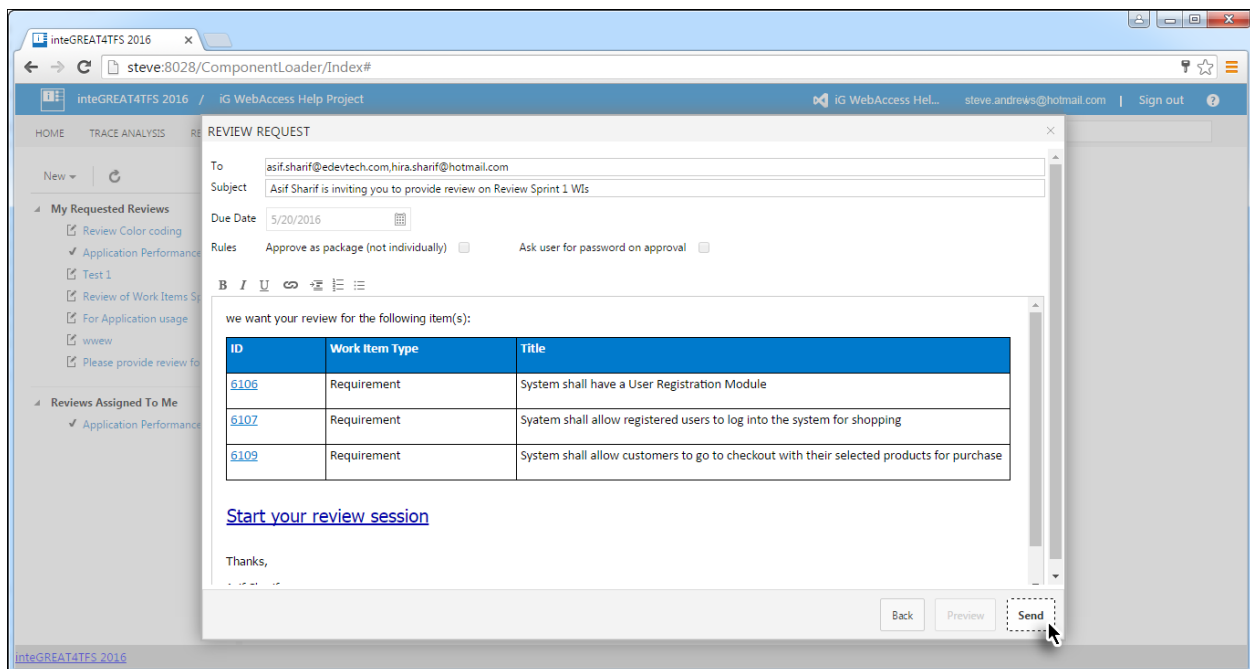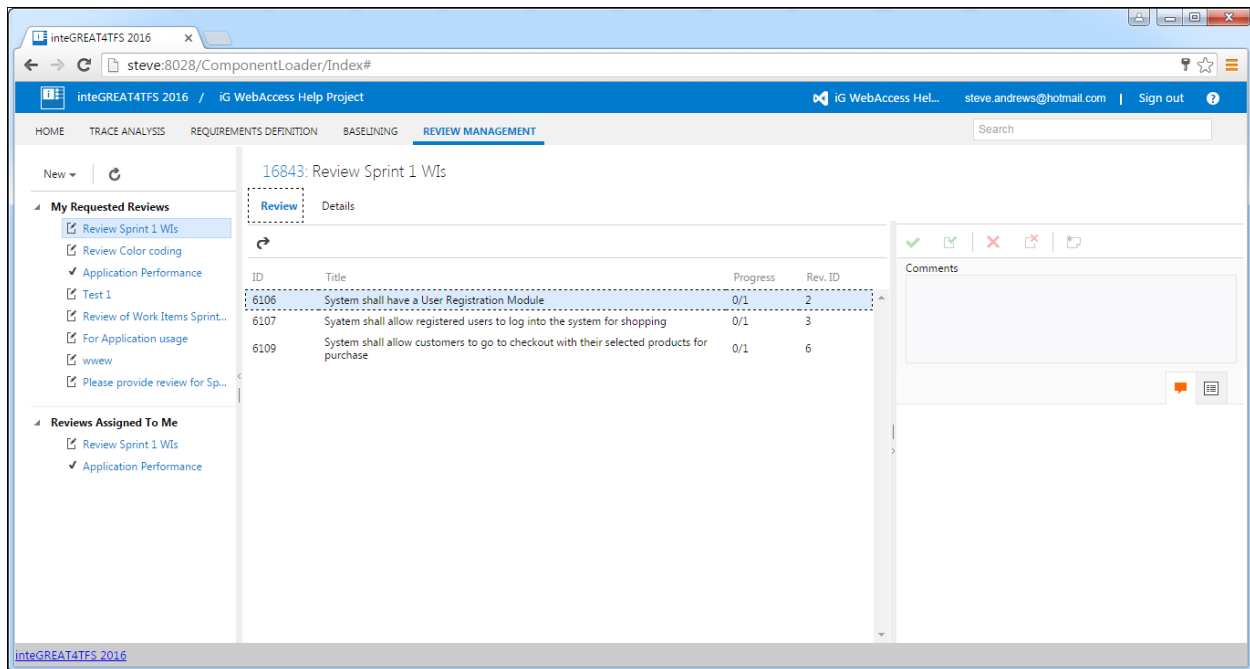
Note: In the preview, only the text box area is editable. All other information such as recipients is shown in read-only format. If these need to be edited, the user has to go back and alter the relevant options.

13. Make formatting updates (optional) and click the **Send** button.
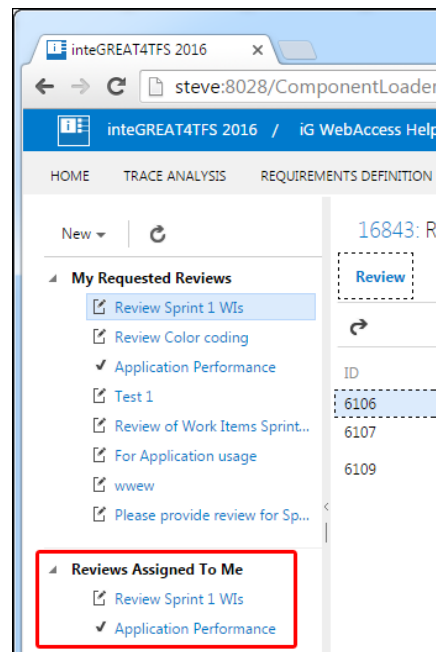
The Review Request is created and becomes visible at the module's landing page.

RESPONDING TO A REVIEW REQUEST

- The Review Requests assigned to a user are arranged under **Assigned to Me** heading in the Review List panel.
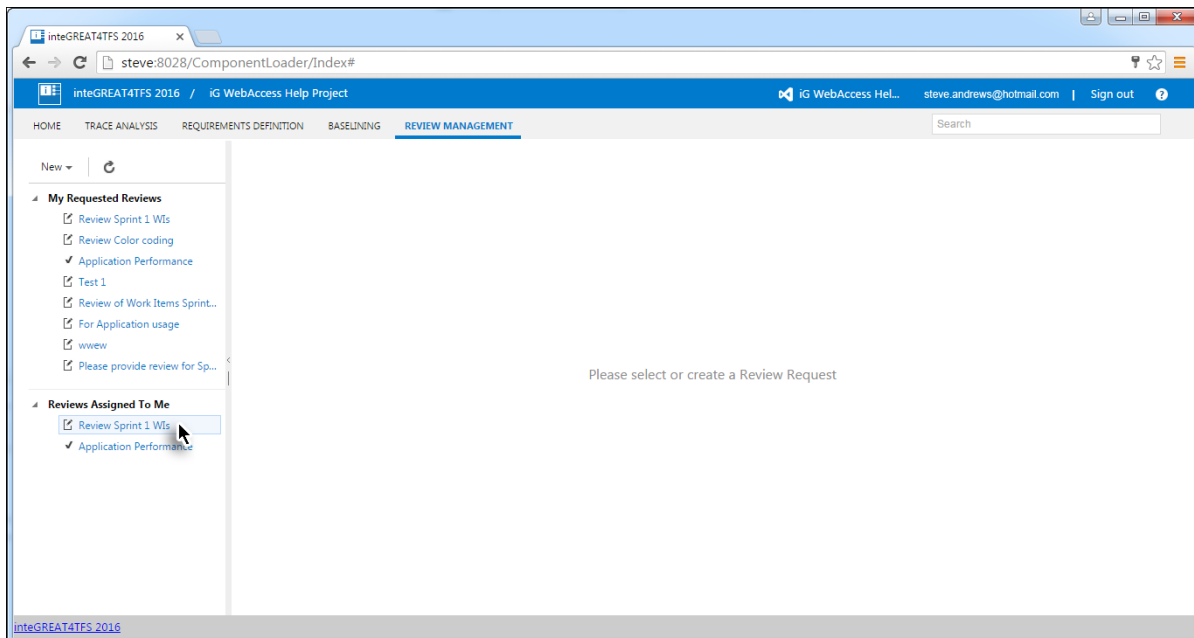

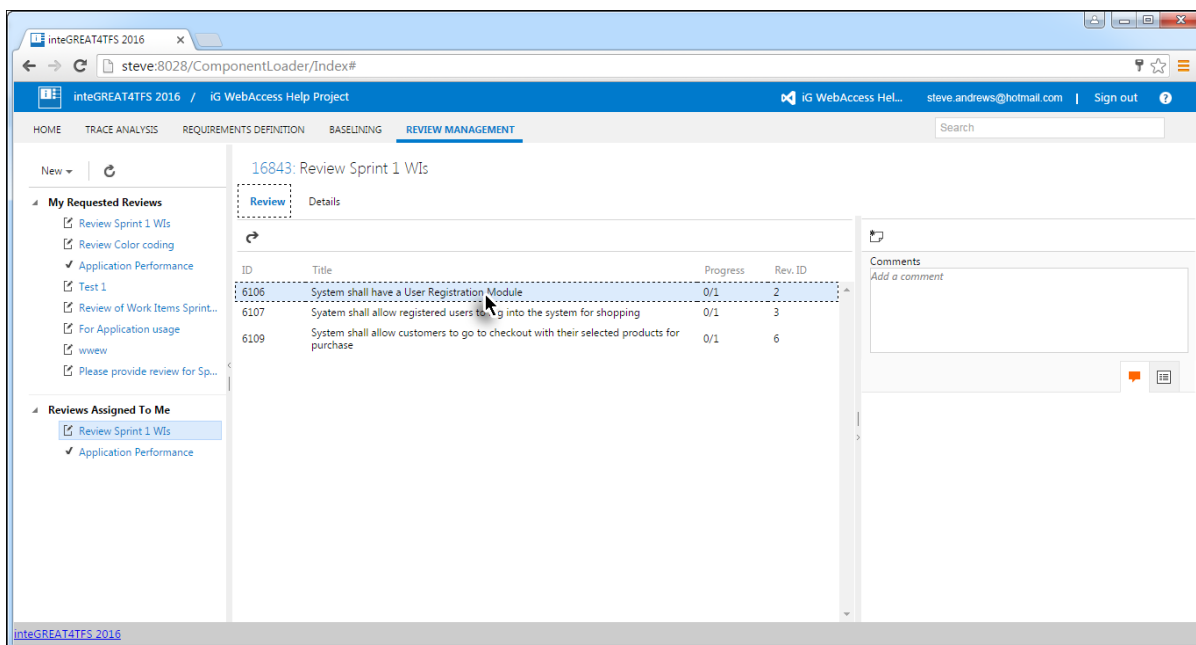- The process to respond to the review requests is slightly different for Reviewers and for Approvers.
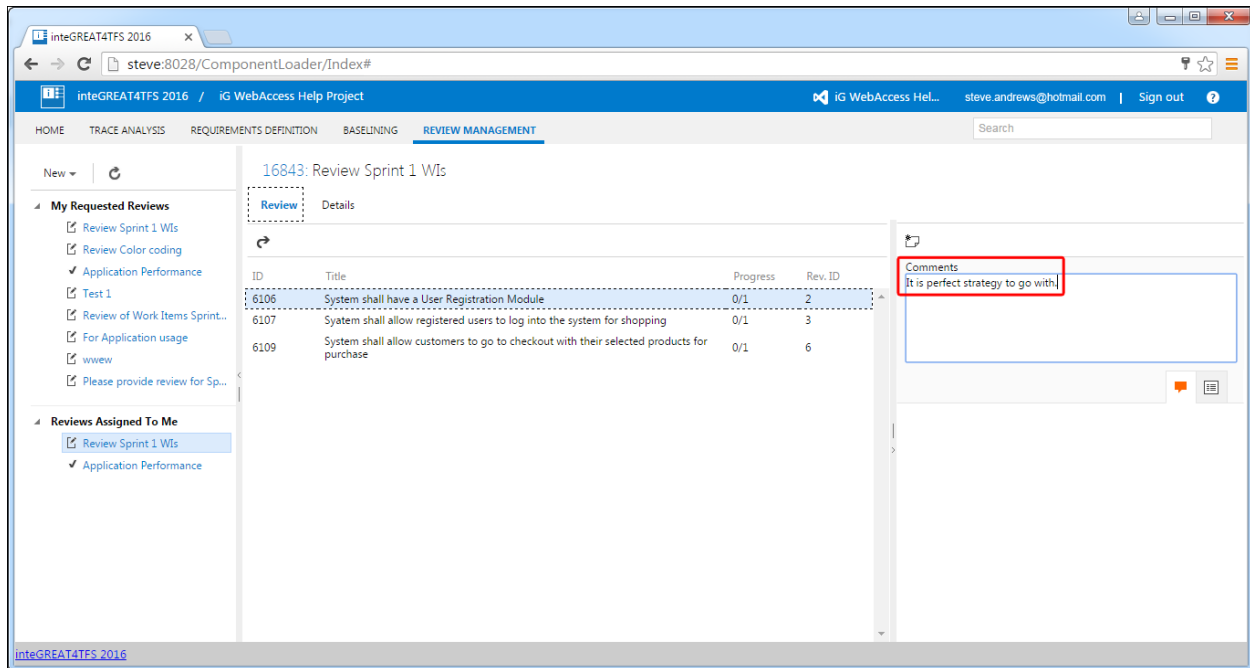
FOR REVIEWERS

1. Click the relevant Review Request under the **Assigned To Me** heading in the Review List panel.
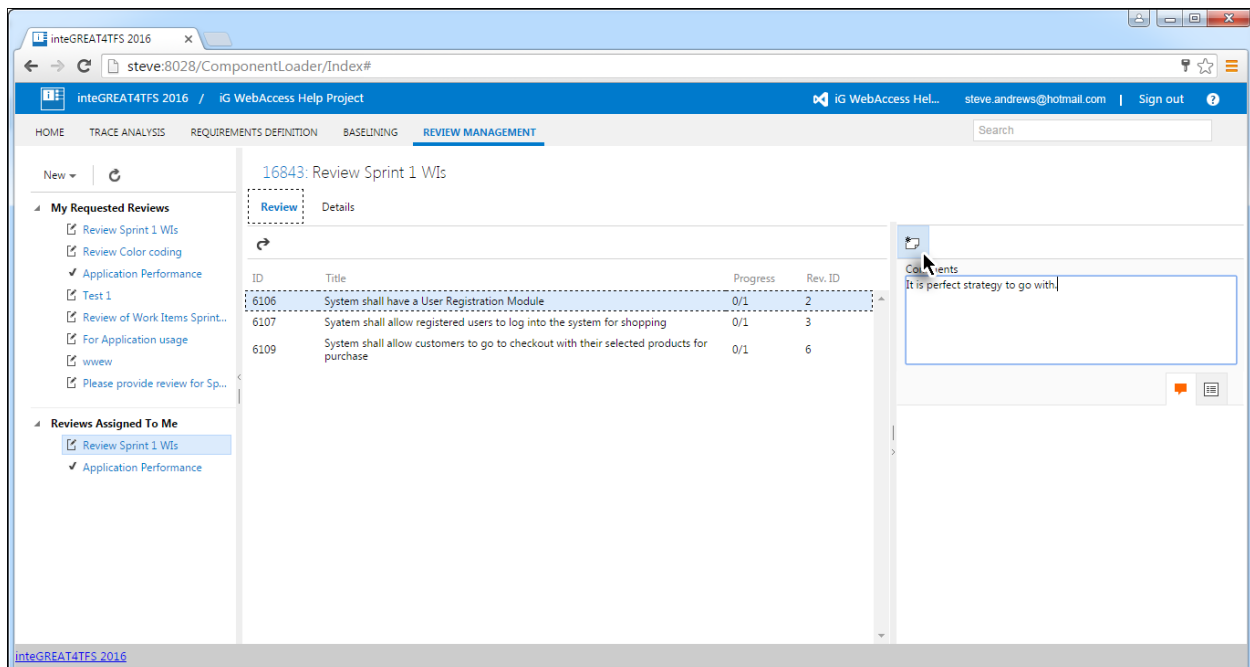

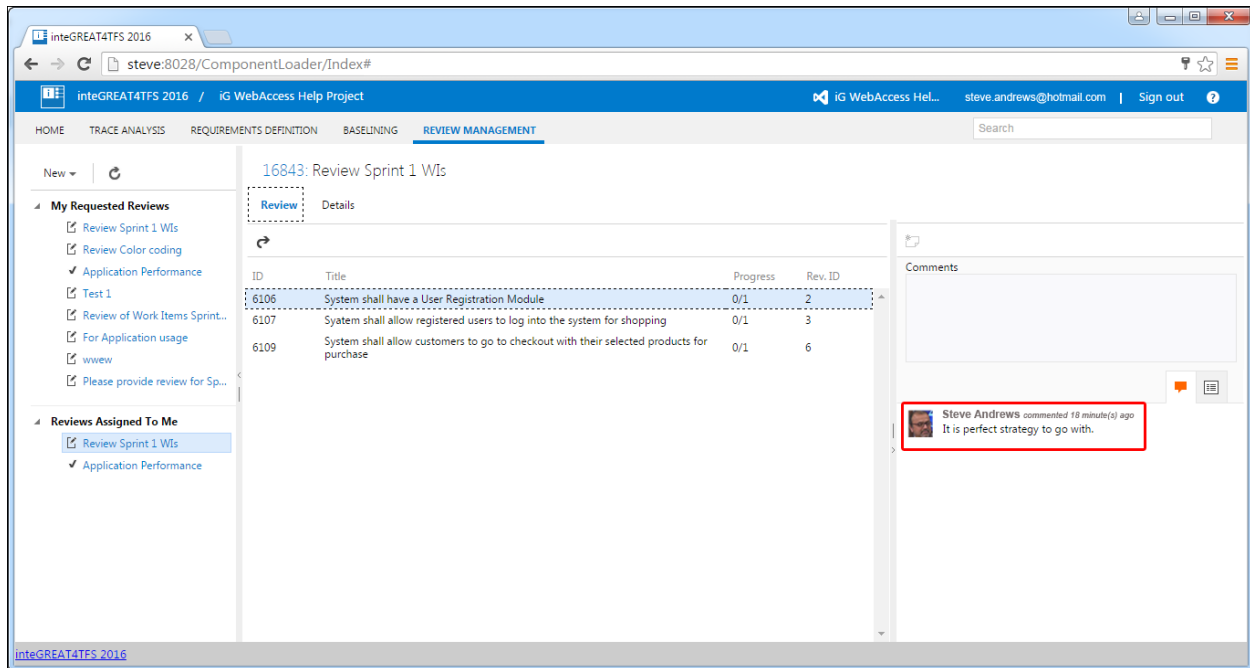2. Select the Work Item for which the review is to be given.

3. Provide a comment (optional).

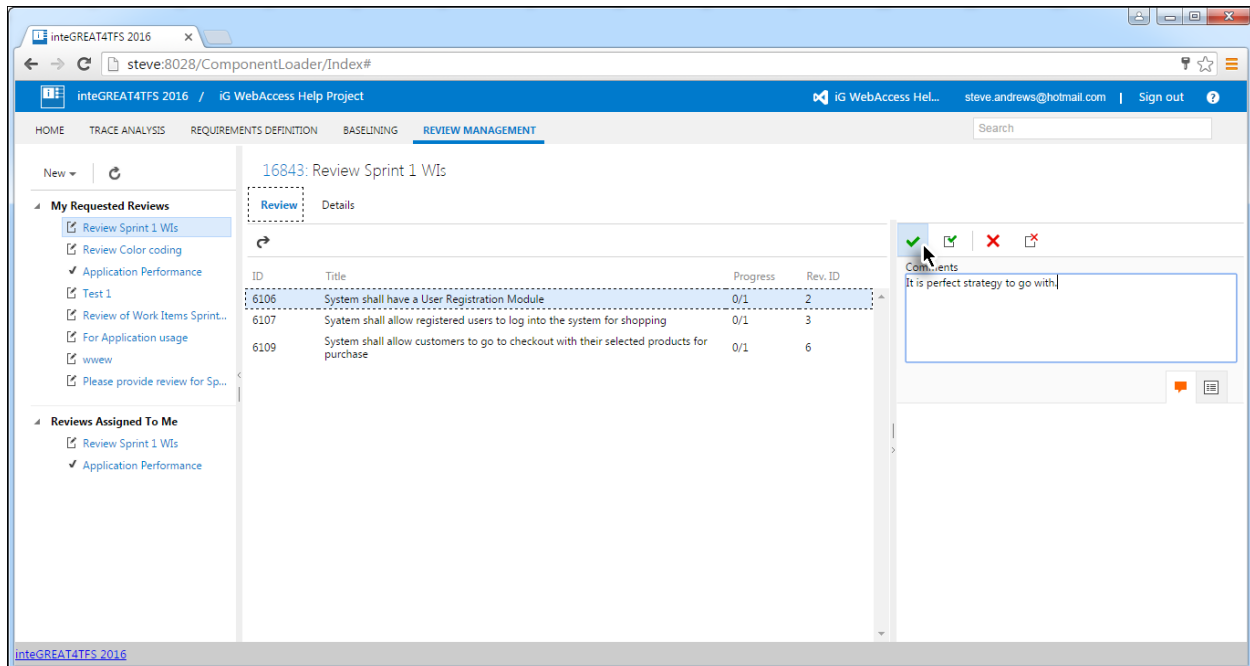4. Click **Add Comment** button.

The response for the selected Work Item is completed.

5. Repeat the process with all other Work Items of the Review Request.

FOR APPROVERS

- Providing a comment is not mandatory for approvers, however it is mandatory for stakeholders.
- For approvers there is an extra step to accept or reject the Work Item from the Review Request.

- If **Accept All** or **Reject All** option is selected, instead of simply selecting the Accept/Reject option, then the response is finalized *for all Work Items* of the Review Request and the user does not have to repeat the whole process for each Work Item as mentioned in **Step 5**.