HelixALM

Professional Services

PERFORCE

Administrator Training

Administrator training is for team leaders responsible for the day-to-day Helix ALM configuration and management. Our ALM consultants will spend time with your team to understand your specific needs and align your Helix ALM implementation to best suit your process and business needs. Topics may include:

SYSTEM ARCHITECTURE – 2 HOURS

- Managing licenses and users
- Server-level options
- Server logging
- Project database management
- Backup and Recovery best practices
- Providing user access to projects
- System configuration options overview

PROJECT ADMINISTRATION, PART 1 – 2 HOURS

- Defining record types
- Creating custom fields
- Renaming field labels
- Defining record link relationships
- Creating item mapping rules
- Configuring Project Options

PROJECT ADMINISTRATION, PART 2 – 2 HOURS

- Configuring workflows
- Automating processes
- Configuring folders
- Overview of security group setup

Perforce Software offers a full spectrum of training and implementation services to fit your needs and assist you in integrating Helix ALM into your daily workflows.* We offer:

- **Remote and onsite training**
- **Remote and onsite Consulting**
- **Custom coding services**

*Request a quote for pricing.

User Training

Helix ALM user training is for users with varying technical skills. The course structures can be tailored to the needs of each team and may include the following:

BASIC – 2 HOURS

- About Helix ALM
- Basic navigation
- Creating and editing records
- Using the workflow
- Basic searching
- Linking items

ADVANCED – 2 HOURS

- Advanced filtering
- Creating saved views
- Using folders
- Creating reports

ADDITONAL TOPICS (BY REQUEST)

- Requirement Document deep dive
- Organizing your testing library
- Intaking prioritizing issues

Remote Consulting

Leverage our product knowledge to enhance your usage of Helix ALM. These custom services are defined by your agenda. Example services include:

SYSTEM OPTIMIZATION
Best Practices
- Advanced workflow support
- Advanced process automation
- Project configuration for regulated industries*
    - o 21 CFR Part 11
    - o FMEA configuration
    - o   ASIL configuration
    - o   ISO 26262, IEC 62304, DO-178

* We can assist with the configuration of Helix ALM for highly regulated industries to make sure you get the most out of the compliance features built into Helix ALM. While we provide assistance configuring for parts of the ISOs/ ICEs, we do not ship a validated project out of the box.

UPGRADE OR MIGRATION SUPPORT
- Environment planning sessions
- Additional temporary licenses for smooth migrations
- Historical data import
- On-call support during upgrade/migration

Onsite Consulting

IMPLEMENTATION, TRAINING, & CONSULTING – 3 TO 5 DAY ENGAGEMENTS
Everything available in Remote Training and Remote Consulting are also offered onsite. Customer is responsible for travel expenses. Please note that Custom Coding is not a part of our onsite packages.

Custom Coding Services

INTEGRATION AND SCRIPTING
Best Practices
Integrating your existing business tools with Perforce solutions is a great way to save time and reduce errors by simplifying the exchange of data between departments and business units. Whether you want to create issues from help desk tickets, publish your team's metrics through SharePoint, or extend the capabilities of your Perforce solutions to tie more closely into your existing environment, our Professional Services team can help.

After we review your business applications and discuss the benefits you will gain by integrating tools, we will work with you to:
- Define requirements and develop a functional design specification that outlines what we will deliver to meet those requirements.
- Provide a formal quote and delivery timeline, ensuring there are no surprises.
- Schedule user acceptance testing in your environment to ensure the application meets your requirements.
- Deploy the application in your production environment and answer any questions you may have.

At the end of the project, you will receive detailed documentation that includes how to install, configure, and maintain the application, as well as any source code or other deliverables produced during the project.