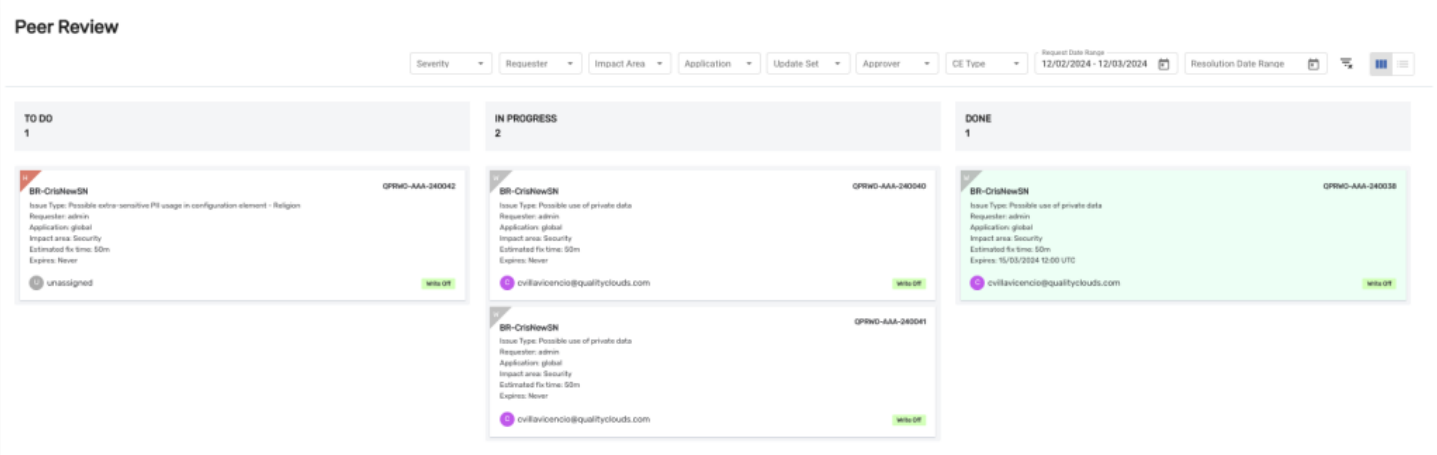
Peer Review

Views in Quality Clouds · https://community-staging.qualityclouds.com/qcdocs/qc/views/peer-review/

The purpose of this document is to guide users, especially Release Managers and Architects, in utilizing the Peer Review view within the Quality Clouds platform. The Peer Review allows customers to manage write-off exceptions generated from the ServiceNow application by developers.



Description

What is the Peer Review view?

- **Platforms available:** ServiceNow.
- **Users that have access:** Normal user, Customer Admin, and Project user.

The **Peer Review view** allows viewing write-off exceptions generated from the ServiceNow application by developers. These exceptions can be assigned based on configuration settings.

*When will a developer require a write-off?

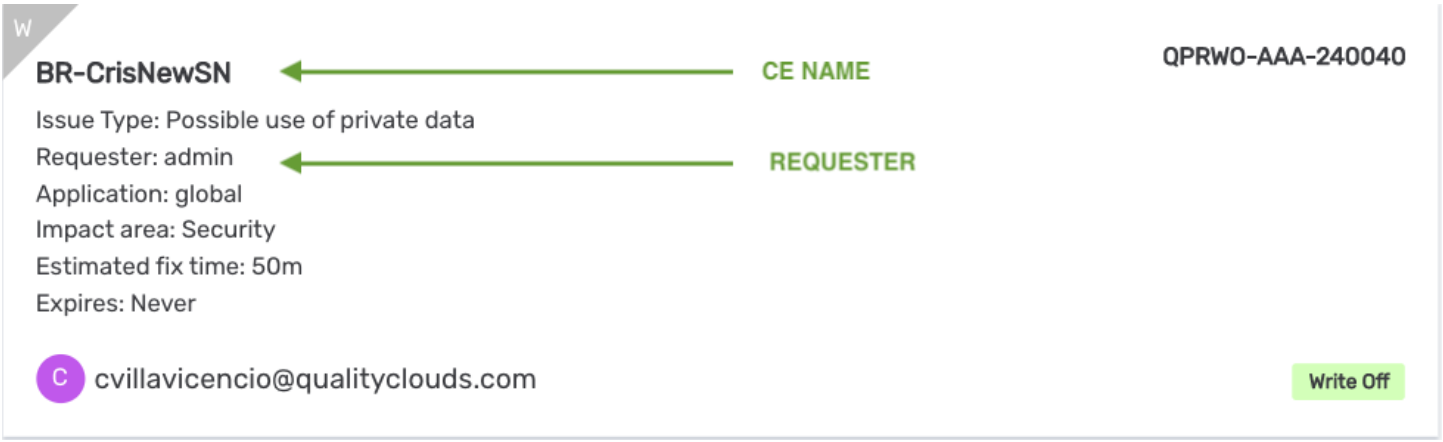
A developer will need a write-off when an issue breaks the **Quality Gate**s and cannot be resolved (type of issues are not accepted and are **blocked**). In such cases, the write-off will appear in the Peer Review view.

In the Peer Review view, the system categorizes the write-off status into three different columns: to do, in progress, and, done. Each column shows 'Kanban cards' that provide detailed information about the write-off which can be sorted by filters.

What data is shown

Kanban cards information:

- **CE Name:** CE name is the name that the developer gave to the customization.
- Update set name: Update Set Name is a label or identifier given to a collection of changes made to an instance.
- **Issue Type:** Non-compliance with a best practice/rule type.
- **Requester:** Shows the person that request a write-off.
- **Severity:** High/medium/warning/low
- **Impact area:**
  - Security: Defines the degree to which a product or system protects information and data so that persons, products, or systems have the necessary amount of data access apt to their types and levels of authorization
  - Manageability: Defines the effectiveness and capability of persons, products, or systems able to be managed or controlled.
  - Scalability: Defines the effectiveness and efficiency with which a product or system can be used or produced in a wide range of capabilities; in this case, impacting how a product is modified to improve,
- **Estimated fix time:** The time it takes to resolve or fix issues or problems reported.
- **Expires:** Indicates the exact date of the Write Off expiration.



Filters:

- **Severity:** High/medium/warning/low
- **Requester:** Shows the person that request a write-off.
- **Impact area:**
  - Security: Defines the degree to which a product or system protects information and data so that persons, products, or systems have the necessary amount of data access apt to their types and levels of authorization
  - Manageability: Defines the effectiveness and capability of persons, products, or systems able to be managed or controlled.
  - Scalability: Defines the effectiveness and efficiency with which a product or system can be used or produced in a wide range of capabilities; in this case, impacting how a product is modified to improve,
- **Application:** Shows the issues of the selected application.
- **Update Set**: Shows the issues of the selected update set.
- **Approver**: Filters the issues by the selected approver.
- **CE Type:** Configuration Element type: Quality Clouds general term for any object or component we scan, e.g., a 'business rule' or 'script include' in ServiceNow world or an 'Apex class' or 'custom object' in Salesforce.
- **Request Date Range:** Allows users to specify a particular range of dates to track.
- **Resolution Date Range:** Allows users to specify a particular range of dates to track.

OPERATIONAL USE

Prerequisites:

- Peer Review view should be enabled.
- ServiceNow app should be enabled and correctly configured.
- Quality Gates enabled and configured.
- Peer Review workflow should be enabled and configured.
- Live Check view should be enabled.
- Approver functionality should be configured.

Learn how to access the view here.

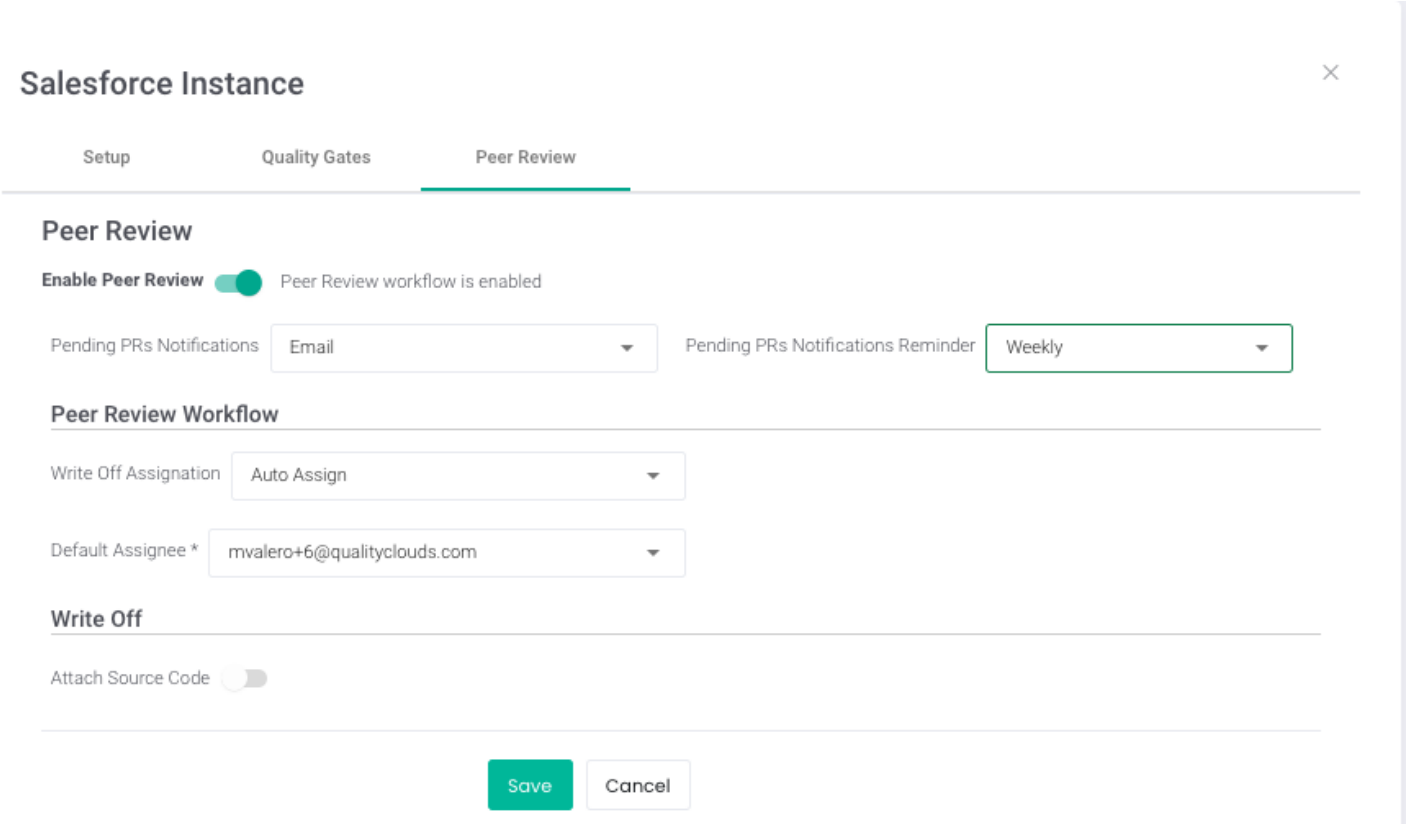
Set up Peer Review in the Admin Portal for the ServiceNow App

→ How to activate Peer Review from the Admin Portal:

- Go to the **Admin Portal.**
- Go to the **'Account**' section.
- Go to the **'Instance'** tab**.**
- Select an instance.
- Click on **'Edit instance'.**
- Select **ServiceNow.** *Remember Peer Review is only available for ServiceNow.
- Select the **Peer Review tab.**
- Enable the **Peer Review toggle**.
- Select where and when to get notified when Peer Reviews are pending:
  - Where: None, Email or Portal.
  - When: None, Daily, Weekly or Monthly.
- In the Peer Review Workflow section select '**Write Off assignation'**:
  - **Manual assign**: Someone decides to whom is assigned. - Manual Assign will hide the Default Assignee drop-down menu.

- **Auto Assign:** It is necessary to assign the write-off to someone specific. Auto Assign will show the Default Assignee and there won't be any other option than to select one person from the list.
- **Developer Assign:** The developer when requesting the write-off from the ServiceNow application, will decide who is going to approve it according to his internal organization.

- Select the Default assignee email on the dropdown menu. Enable it if you want the default assignee to be notified when a write-off is assigned.
- Enable or disable the Source Code toggle.
- Click '**Save**'.



Click here to learn how to define ServiceNow instances.

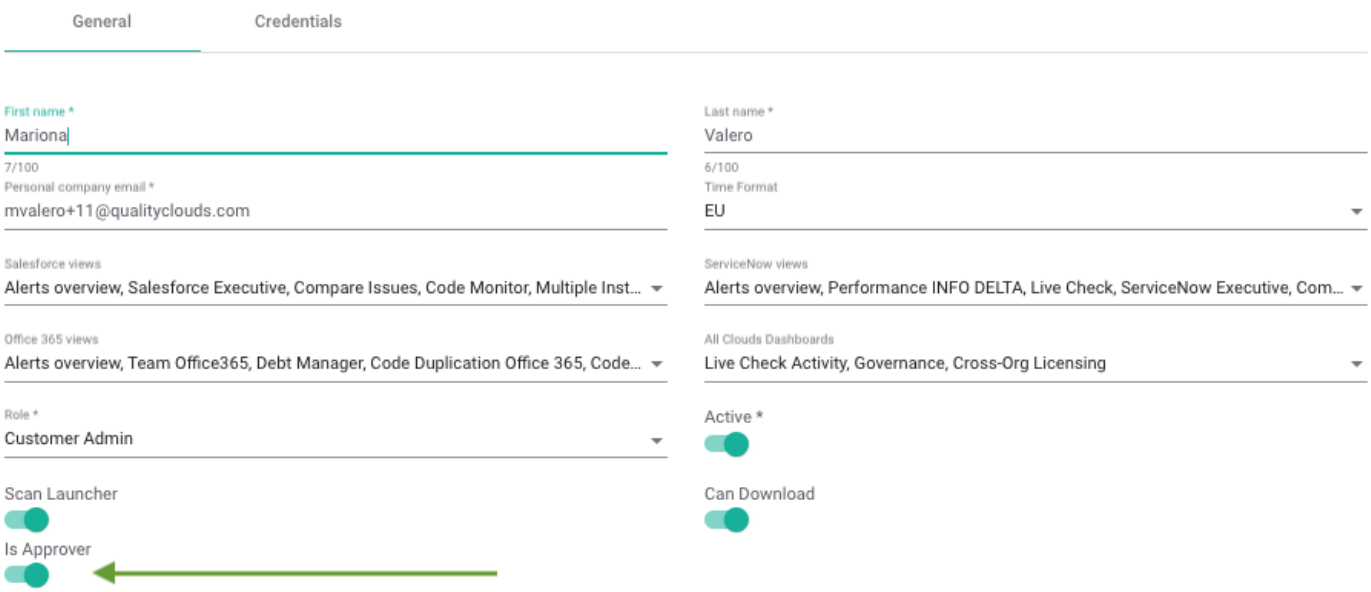
Once configured the Peer Review on the Admin Portal, the write-off exception will appear on the Peer Review view.

Approver functionality

To be a Peer Review view approver, make sure the approver function is turned on in the Admin portal. This feature lets you review and decide whether to approve or reject requests assigned to you.

→ How to enable the approver functionality on a user?

- Go to the **Admin Portal.**
- Go to the '**Account**' section.
- Go to the '**Users**' tab**.**
- Select an user.
- Click on the edit button.
- Enable the '**Is approver**' toggle.
- Click '**Save**'.



Monitor Peer Reviews

To monitor Peer Reviews, you need to have the approver functionality enabled.

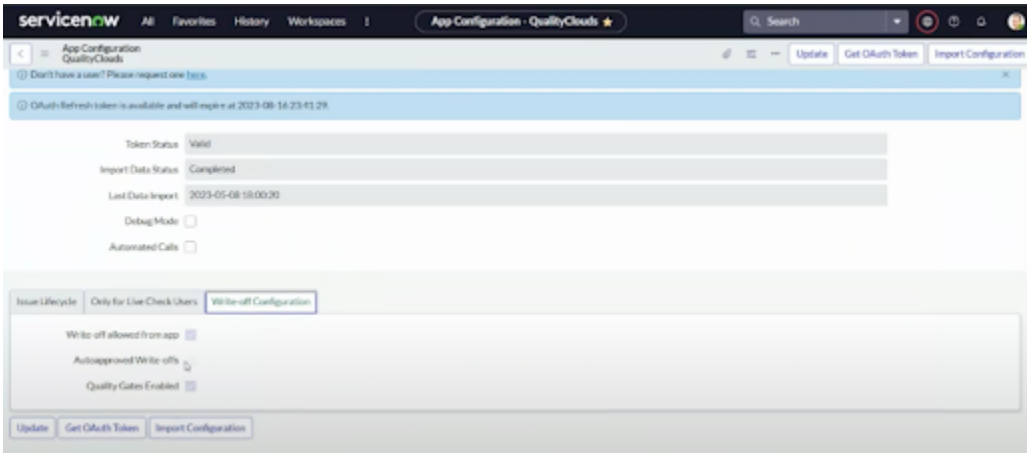
With this view, you can not only view and filter the Kankan cards but also approve or reject requested write-offs within the ServiceNow app.

Clicking on the Kankan card will show a window with more detailed information about the peer review and >>>

Create a write-off from the Quality Clouds ServiceNow app

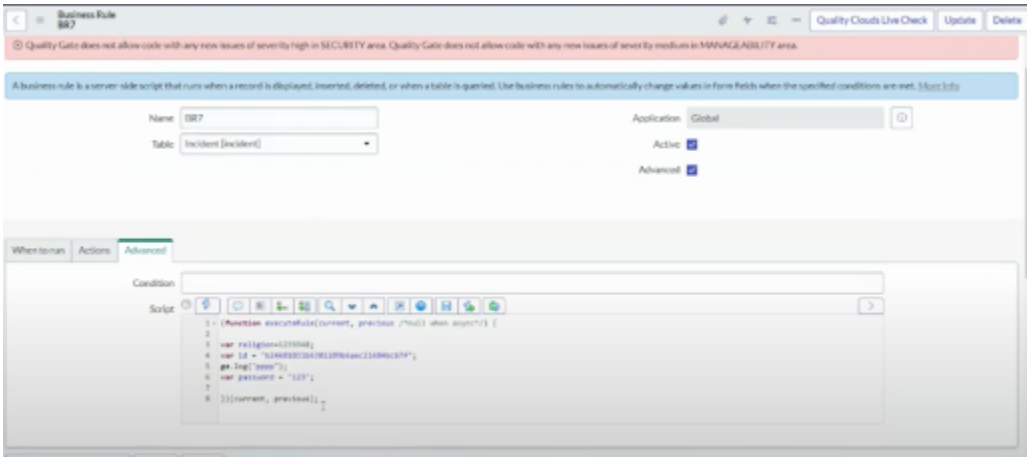
If you encounter code issues in the ServiceNow app that you can't resolve, you have the option to **request a write-off** (approval required)

If Peer Review is enabled in the Quality Clouds Portal for an instance, import the configuration in the ServiceNow app. Activating the Peer Review option disables the Auto Approved feature.



Previous steps to **request a write-off:**

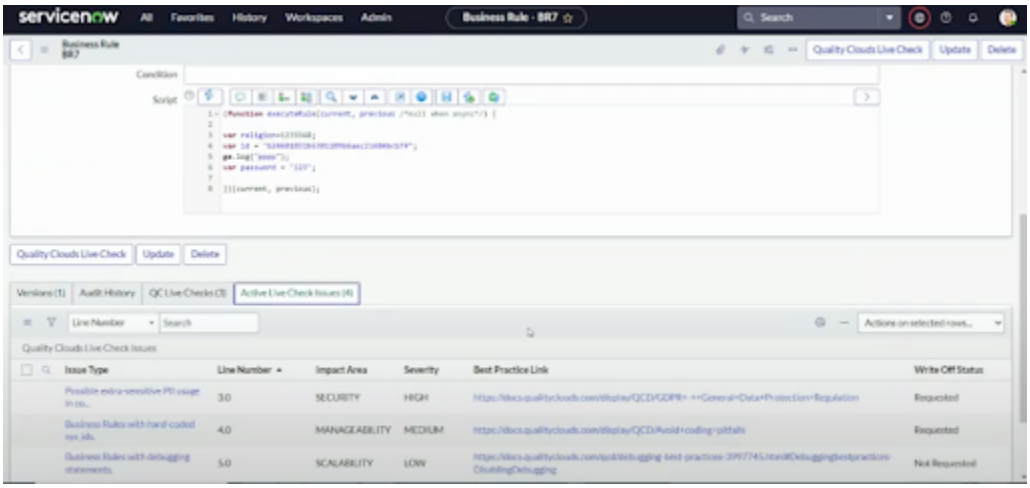
1. Go to the ServiceNow app
2. Select the **configuration element**



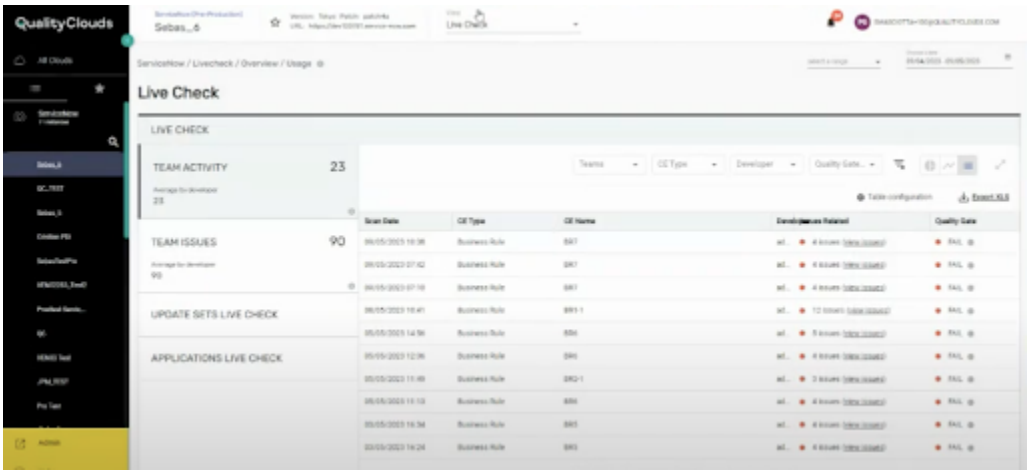
3. **Run** a Quality Clouds **live check**

4. **Check the results:**

1. In the ServiceNow app: click the Active live check issues section → it shows the issues that the code from the script has.

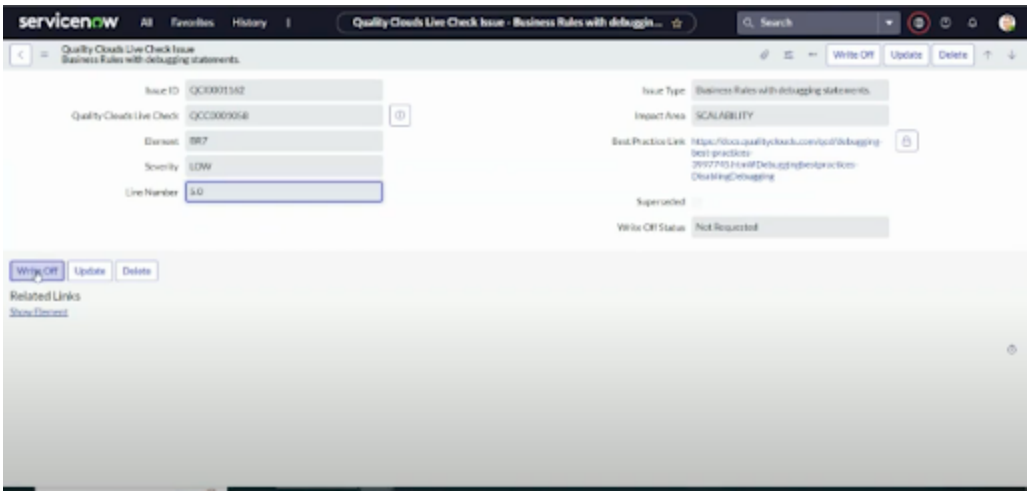


2. In the Quality Clouds platform: go to the Live Check view.

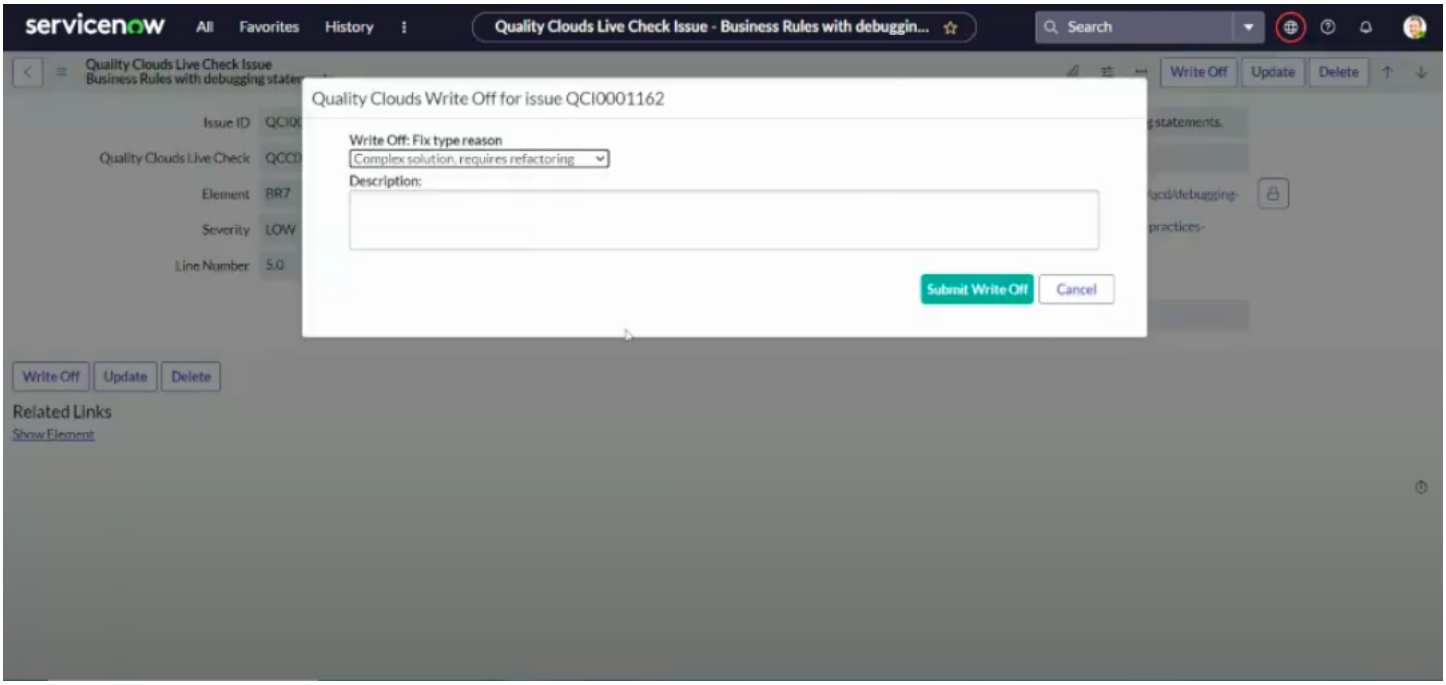


Operational steps to **request a write-off**

1. On the Live Check results table, click the issues you want to request a write-off.
2. Once you are inside the tap of the issue, click on the write-off button.



3. Add the reason for requesting a write-off and add the description.



4. Click on the submit write-off button to request it.

- From the ServiceNow application, developers can run a **live check scan**. The write-offs created from the application Service Now will be identified as requested.
- From the **Debt Manager view**, the write- off request created from the application Servicenow, will be identified in the **Pending Issues** section. The **write-off can be approved or rejected from the Peer Review view.**
- When the write-off is manually approved, it will be shown in the Done column in the Peer Review view. And will also be shown in the Debt Manager view in the Closed section (justified).

- When the write off is manually rejected, it will be shown in the Done column in the Peer Review view. And will also be shown in the Debt Manager view in the Active section as an open issue.
- If the **issue finally is solved**, the final status will be **closed.**

When Peer Review is not enabled from the QC Portal, then the write-off request will be auto approved. So they will be shown in the ServiceNow app as approved and in the Debt Manager as Closed (Justified).

Use Cases

If **Peer Review** is **activated** on the Quality Clouds portal in the instance:

- When Manual Assign is selected in set up options, the write-off issue will be seen in the to-do column.
- When Auto Assign is selected in set up options, it will be assigned by default so it will be shown in the Progress column. Developers assigned will receive a notification. To update a new live check is required.
- When the write-off is approved or rejected- It appears in the Done column.
- If the write-off is rejected, the issue will be seen in the Active tab in the Debt Manager view so the developer is required to fix the issue.
- If the write-off is approved it will be justified on the Closed (Justified) section, in the Debt Manager view.
- It is possible to create the write-off request from the ServiceNow application. From the Debt Manager view, can be identified as Pending Issues.