BEST PRACTICES

Tracking & Managing Your Requirements For Product Releases

I. Objective

This document outlines the best practices for:

- Tracking and managing your requirements for a specific product release.
- Roadmapping your requirements over multiple releases.

II. Best Practices

Accompa enables you to achieve these objectives using the powerful "SmartViews" functionality.

> "SmartViews" in Accompa are tables that display a list of requirements in Accompa which meet certain criteria set by you.
>
> After you enter requirements into Accompa, SmartViews provide you a simple, flexible way to display a subset of them. You can create an unlimited number of SmartViews - using a lot of ways to filter and sort your requirements to find the answers you're looking for.
>
> Further details are available at Accompa Online Help.

A. Managing Requirements for a Specific Release

Would you like to create, group, and manage your requirements for a specific product release (or iteration)? The following steps outline the best practices:

1. Create a custom field (How do I do this?) to assign a "Release" to each requirement. Select "Picklist (Pick One)" field type when you create this field. Enter the values for different releases (Examples: v1.0, v1.5, v2.0, etc.) when prompted.
2. If your company uses agile methodologies, you can create more custom fields to represent "Iteration" or "Sprint." In addition, you may also create custom fields, such as "Release Date," to track more data related to release.
3. Next, create a custom SmartView (How do I do this?) (Example SmartView Name: "Release v1.5") that displays all requirements for a specific release. You can achieve this by setting the following criteria in the "Filter Criteria" section while you create this SmartView: Release equals v1.5
4. This SmartView now has all the requirements for release "v1.5." You can access this SmartView at any time to view the requirements.
5. You can share the requirements for a given release with stakeholders in the following fashion:

- If stakeholders already have Accompa accounts, simply share the name of the SmartView with them. (P.S., When creating the SmartView, make sure to save it as "Public SmartView" in the last step so that others can access it)
- If stakeholders don't have Accompa accounts, you can easily save the SmartView as Excel/Word/HTML files (just click "Actions > Save to Computer As" from the SmartView page) and send the file to them.
- Using the "MRD/PRD Wizard," create a requirements document in Word/HTML/PDF format (How do I do this?) and share with stakeholders. When creating the requirements document, make sure to select "Requirements Only" in the "Choose Scope" section and the desired "SmartView" in the "Select Requirements" section.

B. *Managing Requirements for Multiple Releases, Roadmapping*
Create multiple custom SmartViews that represent different releases. Then you can leverage these SmartViews to manage your release roadmap. In addition, you can also create SmartViews that show requirements planned for a certain time period—such as Q3 of 2009, or 2010, etc—by setting filter criteria against "Release Date" and other custom fields, as needed. Furthermore, you can create SmartViews for "Features" (instead of "Requirements") and use them to represent high-level product roadmap.

III. Summary
We hope you found this short document helpful in understanding how to use your Accompa system to manage requirements for a specific product release, or over multiple releases.

Please contact us if you have any questions or have ideas to improve Accompa to serve your needs better. As always, we wish you continued success and thank you for being our customer!

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About Accompa
More than 100 companies of all sizes (from Fortune-500s to startups) use Accompa to gather, track, and manage requirements while saving time & increasing productivity. Accompa is 100% cloud-based and is easy to deploy and use. Now you can achieve powerful real-time collaboration across your internal teams, as well as with your customers. Get started — see links below...

Our mission: *To help you build more successful products more efficiently* by enabling you to continuously improve every part of your requirements management process.

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