Accompa Best Practices

Tracking & Managing Your Requirements For Product Releases

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Best Practices

Tracking & Managing 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 "**Views**" functionality.

> "Views" 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, views provide you a simple, flexible way to display a subset of them. You can create an unlimited number of views - 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" 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 methodlogies, 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 view** (How do I do this?) (*Example View 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 view: **Release** equals **v1.5**

4. This view now has all the requirements for release "v1.5". You can access this view 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 have Accompa accounts, simply share the name of the view with them. (*P.S.* When creating the view, make sure to save it as "Public View" in the last step, so that others can access it).
    - If stakeholders don't have Accompa accounts, you can easily save the view as Excel/Word/HTML files (just click "Actions > Save to Computer As" from the view 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 the desired "View" in "Select Requirements" section.

B) Managing Requirements for Multiple Releases, Roadmapping:

Create multiple custom views that represent different releases. Then you can leverage these views to manage your release roadmap. In addition, you can also create views 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 views 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 beter. As always, we wish you continuing success, and thank you for being our customer!