Accompa Best Practices

Using “Views” To Manage Your Requirements

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I. Objective:

This document outlines the best practices for:

- Using the powerful, flexible "Views" functionality in Accompa to track, group and manage your requirements effectively.

II. Best Practices:

Accompa has powerful, yet flexible "**Views**" functionality that you can leverage to effectively track , group and manage your requirements.

> "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) 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 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 "Requirements Only" in the "Choose Scope" section and the desired "View" in the "Select Requirements" section.

B) Requirements for a Specific Product:

Managing requirements for a specific product is very similar to the steps listed above. The only difference is that you use 'Products" field instead of "Release" field to create the "View".

C) Most Important Requirements for a Product or Release:

The steps for this are similar to those listed above in II.A and II.B above, with the following additional steps.

1. Calculate "ROI" (Return on Investment) of each requirement using Accompa's ROI Score feature. [How do I do this?]
2. When creating the "View", in the "Sorting Criteria" step – select either:
   - Sort from high to low -by- ROI Score
   - Sort from high to low -by- Total Return Score

D) High Level Feature Roadmap:

1. Use "Features" to store high-level features in your Accompa system, while

using "Requirements" to store detailed requirements. In this set-up, "Features" is used to communicate with customers and executives – while "Requirements" are used to track details for implementation purposes.

2. Then create "Views" for "Features" [How do I do this?] and set "Filter Criteria" to match specific values in "Release" or "Product" field. Then use these views to share high-level Feature Roadmaps with appropriate stakeholders.

E) Requirement Backlog:

1. When creating requirements – assign them to specific releases using the custom field named "Release".
2. If a requirement is unassigned to a release – set "Release" field of that requirement to "TBD" or just leave it blank.
3. Then create a "View" named "Backlog" and set "Filter Criteria" as either:
    - "Release" equals "NULL"
    - "Release" equals "TBD"
4. This view will display all the requirements in your backlog.

F) Requirements Requested By a Specific Customer:

1. Create a custom field called "Customers Requesting". Select "Picklist (Pick Multiple)" field type when you create this field.
2. When creating requirements – set "Customers Requesting" field to appropriate value.
3. Create a "View" with "Filter Criteria" set as the following:
    - "Customers Requesting" equals "ABC Corp"
4. Alternately, perform an "Advanced Search" [How do I do this?] with criteria:
    - "Customers Requesting" equals "ABC Corp"

G) "View Groups":

- Do you have a need to create a large number of views (say, 20 or more) to manage your requirements data? In such a scenario, you might "View Groups" functionality very useful.
- A "View Group" enables you to group similar views together and create a hierarchy of views. This will, in turn, make it easier for you to access and

manage a large number of views.

- Please visit this link for details on how to create and manage "View Groups".

III. Summary:

We hope you found this short document helpful in understanding how to use "Views" functionality of your Accompa system to group and manage your requirements . 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!