

## BEST PRACTICES

# Using “SmartViews” To Manage Your Requirements

Email: [sales@accompa.com](mailto:sales@accompa.com)

Website: [www.accompa.com](http://www.accompa.com)

Call: +1-408-689-8231

A “SmartView” is a powerful functionality in Accompa that you can use to group, organize, and manage your requirements.

### I. Objective

This document outlines the best practices for using the powerful, flexible “SmartViews” functionality in Accompa to track, group, and manage your requirements effectively.

### II. Best Practices

Accompa has a powerful, yet flexible “SmartViews” functionality that you can leverage to effectively track, group, and manage your requirements.

“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. 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)

Using SmartViews you can manage:

- ✓ Requirements for a release
- ✓ Requirements for a product
- ✓ Requirements for a customer
- ✓ Roadmap
- ✓ Backlog
- ✓ And more...

- 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 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 “SmartView” 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 “SmartView.”

### ***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 “SmartView” 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” are used to communicate with customers and executives while “Requirements” are used to track details for implementation purposes.
2. Then create “SmartViews” for “Features” ([How do I do this?](#)) and set “Filter Criteria” to match specific values in “Release” or “Product” field. Then use these SmartViews 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 “SmartView” named “Backlog” and set “Filter Criteria” as either:
  - “Release” equals “NULL”
  - “Release” equals “TBD”

This SmartView 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 “SmartView” 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”

“SmartView Groups” enable you to manage a large number of SmartViews easily, using customizable hierarchy.

### G. *“SmartView Groups”*

1. Do you have a need to create a large number of SmartViews (say, 20 or more) to manage your requirements data? In such a scenario, you might find the “SmartView Groups” functionality very useful.
2. “SmartView Group” enables you to group similar SmartViews together and create a hierarchy of SmartViews. This will, in turn, make it easier for you to access and manage a large number of SmartViews.
3. Please [visit this link](#) for details on how to create and manage “SmartView Groups.”

## III. Summary

We hope you found this short document helpful in understanding how to use “SmartViews” 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 better. As always, we wish you continued success and thank you for being our customer!

## Best Practices – Using “SmartViews” To Manage Your Requirements

### 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.

Document authored by:



Email: [sales@accompa.com](mailto:sales@accompa.com)

Website: [www.accompa.com](http://www.accompa.com)

Call: +1-408-689-8231

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### Headquarters:

5201 Great America Pkwy, Ste 320

Santa Clara, CA 95054

United States

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