Oracle Fusion Product Requirements and Ideation Management
Using Product Requirements and Ideation Management

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This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.

Note

If you don’t see any help icons on your page, then click the Show Help icon button in the global area. However, not all pages have help icons.

You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. To access the guides, go to any page in Oracle Fusion Applications Help and select Documentation Library from the Navigator menu.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.

- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.

- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief
financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

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| Technical Guides              | System administrators, application developers, and technical members of implementation teams | Explain how to install, patch, administer, and customize Oracle Fusion Applications.  
**Note** Limited content applicable to Oracle Cloud implementations. |

For other guides, go to Oracle Technology Network at http://www.oracle.com/technetwork/indexes/documentation.

**Other Information Sources**

**My Oracle Support**

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.
Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides details on service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes.

In Oracle Fusion Applications, you can use Oracle Enterprise Repository at http://fusionappsoer.oracle.com for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.

- Other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Documentation Accessibility

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Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use Send Feedback to Oracle from the Settings and Actions menu in Oracle Fusion Applications Help.
Introduction to Product Requirements and Ideation Management

Product Requirements and Ideation Management: Overview

Innovation Management (IM) promotes the abilities of the enterprise to build the right products. IM enables a company to:

- Collect ideas from different sources, collaborate on them, identify the right opportunities, and promote them as new or enhanced proposals;
- Identify key features and build detailed requirements for these proposals;
- Publish their proposals to a portfolio to get a buy-in from stakeholders; and
- Develop concepts supporting those proposals to ensure the product goals are met.

The elements listed above do not have to be done in any set procession of steps, but can be done in any order based on the enterprise's business processes.

The IM suite includes these three solutions:

- Product Requirements and Ideation Management (PRIM) supports and simplifies the innovation process with ideas, requirements specifications, and feature sets. This guide describes the creation and management of these objects.
- Concept Design Management (CDM) supports defining a product in its conceptual phase, using concepts and proposals. PRIM and CDM objects work together closely.
- Product Lifecycle Portfolio Management (PLPM) gathers product concepts and proposals into a portfolio, and assembles the portfolio team. Portfolio scenarios are modified based on analyses of value, balance, strategy, resources, and product mix.

The Innovation Management solutions are accessed via three work areas, which is based on the roles of the users:
1. Activities related to ideas are done in Ideas work area, which is accessed by company employees and trusted partners and customers.

2. Activities related to requirements, features, concepts, and proposals are done in Concepts work area, which is open to Design Managers, Design Engineers, and Product Managers.

3. Activities related to portfolios are done in Portfolios work area, which is open to Portfolio Managers and other financial and resource managers.

The innovation process begins with ideas being entered into the Ideas work area. As ideas are enriched, grouped, and matured, they can be attached to a new or existing product proposal in the more restricted Concepts work area. Or, ideas can be converted into more formal requirements specifications, which in turn serve as input for concept designs.

Another scenario might see new concepts developed without input from requirements or ideas. In this case, appropriate requirements specifications can be developed afterwards, contributing to the maturing of the concept design. Once a concept design is approved, structures of product concepts and product requirements specifications can be delivered to Agile Product Lifecycle Management for detailed design, creation of prototypes, and ultimately the introduction of a new product or enhancement.
Creating Requirements Specifications and Building Structures

Requirements Specifications and Requirements: Overview

In Innovation Management, a Requirements Specification is a document that could describe “market requirements” (that is, a Market Requirements Document, or MRD), product requirements (a PRD), or business requirements (a BRD). Similar to these, a requirements specification has common characteristics such as name or title, description, approvers, and so forth. And just as a PRD or MRD contains a set of more specific requirements, a requirements specification also contains a hierarchical set of requirements, which contain details about what is expected of the product that is being built. A requirements specification can be of any type, for example, Business-specific, Functional, or Test Case requirements. In IM, two out-of-box application types are called Requirements Specification and Test Case Specification.

The Concepts work area has a left pane called Tasks where common tasks can be performed or initiated. Tasks are grouped into different categories based on business objects. Each category includes a Create task, which allows users to create and continue working on a new instance of that object. Each category also has a Manage task, which allows users to search for objects, navigate to a specific one, and to modify it.

In the Tasks pane on the Concepts work area, use the Create Requirements Specification link to bring up the dialog. A name is required. Entering text into the Description field is optional but useful, as content in the Description field is searchable.

The creation of requirements, that is, separate requirement lines that are part of a structure under a requirements specification, is done on the Edit Requirements Specifications page.

Once a requirements specification is created, its type cannot be changed. The list of requirements specification types is created and modified by the administrator. The Type attribute permits grouping and finding requirements specifications by their type. New attributes can be defined in Data Composer that are specific to a given type of requirements specification.
The Structure of Requirements: Explained

Within a requirements specification, multiple requirements are added that contain the details of what is expected of the product being described or proposed. Requirements can be organized as a flat-list or in a hierarchy. This is the structure. Requirements specifications are supported and enriched by structures comprising requirements. Requirements can be created just by typing-in, or by searching requirements from another requirements specification. A user can also search for a requirements specification to add to the structure (see next topic). A requirements specification and its structure of requirements is displayed and managed in the left pane of the Edit Requirements Specification: [named object] page. Requirements are created as needed, and are added to the structure. A requirement is sometimes called a requirement line because it fills another line of the structure of a requirements specification.

Recognizing Requirements Specifications in a Structure: Explained

A structure below one requirements specification may include other requirements specifications. When a requirements specification is added to a structure, it does not lose any of its inherent attributes or qualities; however, in that context the attributes that you see are those of a requirement. For example, on the Details tab of a requirements specification that has been added to a structure, it does not show the Product attribute, and it does now display the Priority and Fulfilled attributes, like a requirement. Also, its Dependencies tab becomes modifiable (see next chapter about this tab). Where this same requirements specification is at the top level of a structure, or is simply opened from a returned search result, it retains all properties of a requirements specification. There is even its own identifying icon: whereas a requirements specification generally has an icon of an open book next to it, and a requirement has an icon of a page or document, a requirements specification that is being included in a structure shows an icon of the open book with a small grid or page added.

FAQs for Creating Requirements Specifications and Building Structures

What's the difference between a requirements specification and a requirement?

A requirements specification is always the top level of a structure. The structure is known by its top-level requirements specification. A requirement is a detailed statement or information, so a requirement does not collect other requirements.
A requirements specification object can be included in the structure of another requirements specification. In that context, the included requirements specification behaves like a requirement.

**How do I create a requirements specification?**

Click the Create Requirements Specification link on the Concepts work area. Enter a name, which is required, and a description. When you are done, click the Save and Close button. The new requirements specification appears on its own tab, and you can modify it now, or you can close it and you, or another user, can modify it later.

**How do I create a requirement?**

A requirement is always created within the context of a requirements specification. With a requirements specification selected, click the Actions button on the menu bar of the Requirements pane and select Create. Enter information for the new requirement in the dialog. When you click OK, the requirement is added to the structure. From then on, the requirement can be searched, viewed, and modified. It can be moved in the structure, added to other structures, and removed from the structure. You can also right-click the mouse in the structure and use the context menu to create and add a requirement.

**What are options to view requirements and requirements specifications?**

At the top of any Edit Requirements Specification: [named object] page, there are two icons that change the view of the data in the business object. Click the tree icon for the Standard view. Click the grid icon for the Table view, which presents the structure’s items in an editable table format.

Another view option is found on the Actions menu, the Visual Information Navigator (VIN). With a requirements specification or requirement selected, open the Actions menu and select Visual Information Navigator. This opens a graphic display of the requirements specification or requirement, including its structure, relationships, and dependencies.

**How can I delete a requirement or requirements specification?**

With a requirements specification opened, click the Actions menu and select Delete. You will be prompted to confirm your decision to delete, but even if you click Yes, there is a protection and restriction: the system will not delete a requirements specification that has even a single impact association with another requirement or component. If it does, an error message displays, and when you click out of the message, the requirements specification closes.
The process with a requirement is the same, with these differences: there is no warning when you delete a requirement; and a requirement does not close if the deletion process causes an error message.
Managing Requirements and Dependencies

Using Search Features: Explained

In the Tasks pane on the Concepts work area, you can set up a Basic search to find an existing requirements specification, or concepts or proposals. The Basic search lets you select an attribute to be the focus of the search. Results are returned in the Manage Requirements Specifications page, and each row is a live link. This page also displays the search controls. The Advanced search capability is launched from the Advanced link in the Tasks pane, and also from the Advanced toggle button on the Manage Requirements Specifications page. The Advanced search fields appear, and the toggle button changes to Basic.

Editing a Structure of Requirements: Explained

In the left, Requirements pane of the Edit Requirements Specification page, you can manage its structure and content. Many of the following actions are also available through icons on the menu bar, next to the Actions and View menus. From the Actions menu, use Create or Search and Copy to add a requirements specification or requirement to the structure below the selected object in the structure. Use Move Up and Move Down to adjust the order of its requirements. Use Increase Indent and Decrease Indent to adjust the parent-child hierarchy of the requirements. No modification of the structure is committed until you click Save.

Modifying Requirements Specifications and Requirements: Explained

On an Edit Requirements Specification page, as you select on object in the tree structure within the left, Requirements pane, the heading and contents of the right pane changes. If the top-level requirements specification is selected, the right pane’s heading is Edit Requirements Specification: [named object].
If a requirement is selected, the right pane’s heading is **Edit Requirement:** [named object]. Above the right pane are the **View icons**, **Version**, and the **Actions menu**. The version number of a requirements specification cannot be changed until it is approved; at that point, it becomes read only, and **Save As New Version** is automatically added to the Actions menu. The standard Actions are: Visual Information Navigator, Manage Team, Submit for Approval, Export, and Delete.

**More about Modifying Requirements**

The tabs distribute information and data about the selected requirements specification or requirement. The **Details** tab provides basic information. The **Additional Information** tab provides the **Relationships** and **Attachments tables**. On a requirements specification, the **Dependency Summary** tab provides tables that collect dependencies and impacts from requirements in the structure. These read-only tables automatically aggregate, that is, summarize, all dependencies and impacts from all of the requirements in the requirements specification's structure. On a requirement, the **Dependencies** tab provides the **Depends on Requirements** table that list other requirements that the present requirement depends on, and the **Impacts Requirements** and **Impacts Components** tables, which list requirements or components, respectively, that the present requirement impacts. The tables on Dependencies tab are modifiable: you can add dependencies or impacted items to a requirement. FAQs below contain more information about attributes and tables on these tabs.

**Dependencies and Impacts: Explained**

The two kinds of associations are relationships and dependencies, the latter including **Depends On** and **Impacts**. The **Select and Add icon** opens a dialog where you can establish dependency with other requirements. The links on the **Depends On table**, **Impacts Requirements table**, and **Impacts Components table** are added automatically. If a requirement changes that is on a requirement’s **Depends On table**, the latter requirement is impacted by the one that change. If a requirement changes, it will affect those requirements on its **Impacts Requirements table**, and it will affect those components on its **Impacts Components table**. Dependencies are more strict than relationships, in that a requirement cannot be deleted if it impacts another requirement.

**Requirements Specifications in Scope: Overview**

On a requirement, these four attributes are used by product managers to assess progress or completion status: Fulfilled, Priority, Estimates, and In Scope. In particular, Estimates and In Scope can be rolled up by the system in this way: as long as In Scope is set to Yes, that requirement’s Estimates value will be included in the rolled up value. Let’s say requirements specification RS-1 has three requirements, R-2, R-3, and R-4. These requirements have, respectively, 200, 300, and 400 as entered values for Estimates. As long as In Scope is set to Yes for
R-2, R-3, and R-4, the total of Estimates in RS-1 is 900. If In Scope for requirement R-2 is set to No, however, the rolled up total of Estimates in RS-1 is 700.

FAQs for Managing Requirements and Dependencies

How can I control access to a requirements specification?

With an unreleased requirements specification opened, click the Actions menu and select Manage Team. You can search for internal users and add them to the team by clicking Apply. When you are done, click OK. You must save the requirements specification to preserve the team you have set up. Later, you can modify the team by adding or removing members as needed.

What’s the difference between a managed team and an approval or review team?

When the Manage Team action is executed on a requirements specification, users are selected who will have access to read and modify the object. When the Submit for Approval action is executed on a requirements specification, users are selected who will be notified of a Work list task to Approve or Reject the object. Note that a user, who may be sent a requirements specification to approve, may not have access to read or modify the requirements specification itself.

What’s the Details tab?

Details is a tab on all requirements specifications and requirements. The Details tab on requirements specifications includes the Product attribute. The Details tab on requirements carries the scoping attributes, which include Priority, In Scope, Fulfilled, and Estimates. It also has a Content field for a full description of the requirement, which can be enhanced by the Rich Text Editor capability. For more information about the attributes on the Details tab of requirements, see Requirements in Scope.

What’s the Additional Information tab?

Additional Information is a tab on all requirements specifications and requirements. It provides information about relationships and attachments. A relationship is an association, or link, from the current object to another Innovation Management or Agile Product Lifecycle Management business object. An attachment is a file or a URL that is linked to the requirement to provide more information.
What's a relationship?

A relationship is a linked association between business objects. The relationship may be established between Innovation Management objects, or between an IM object and an Agile Product Lifecycle Management object.

Relationships are collected on the **Relationships table**, which is found on the **Additional Information** tab of requirements specifications and requirements. The Relationships table is also found in the Ideas application, on the **Manage Ideas** tab and the **Edit Idea** page.

A relationship link to an IM object opens that object in a new tab. A relationship link to an Agile PLM object opens in a new browser.

How can I associate Agile Product Lifecycle Management business objects with requirements?

From a requirements specification or requirement, navigate to the **Relationships table** under the **Additional Information** tab. Click the **Select and Add icon** to, first, search and find the Agile Product Lifecycle Management item or design that you want to be associated with the requirement. With the Product Lifecycle Management object selected, click **OK** at the bottom of the page. Then click the **Save button** at the top of the page.

How can I add an attachment to a requirements specification or requirement?

With a requirements specification or requirement open and selected, open the **Additional Information** tab. In the **Attachments** area, select **Add** from the **Actions menu** or click the **Add icon**. Select a **Type of File** or **URL**. If the attachment is a file, click the **Browse button** and find the file on your system and select it, then click **OK**. If the attachment is a URL, enter it in the field provided, then click **OK**. You can add a **Title** or **Description** to either type before or after adding the attachment.

What's the Dependency Summary tab?

Dependency Summary is a tab on all **requirements specifications**. It provides tables of links to **Depends on Requirements**, **Impacts Requirements**, and **Impacts Components**.

What's the Dependencies tab?

Dependencies is a tab on all **requirements**. It provides tables of links to **Depends on Requirements**, **Impacts Requirements**, and **Impacts Components**. Dependencies are more strict than relationships, in that a requirement cannot be deleted if it impacts another requirement.
What's the difference between Dependency Summary and Dependencies?

The Dependency Summary tab is on requirements specifications, while the Dependencies tab is on requirements.

Also, the tables on the Dependency Summary tab are read only, while the tables on the Dependencies tab can be modified.

What's on the Depends on Requirements table?

The Depends on Requirements table is on the Dependencies tab of requirements and on the read-only Dependency Summary tab of requirements specifications. This table lists all of the requirements that the selected requirement depends on. Each requirement listed is a live link to open that requirement. The Select and Add icon opens a dialog where you can establish dependency with other requirements. Depends On and Impacts links are added automatically. You must save the requirement to retain the newly added dependency.

What's the Impacts Requirements table?

The Dependency Summary tab of requirements specifications has a read-only Impacts Requirements table that collects the impacted requirements from all of the requirements in the structure. The Dependencies tab of requirements has a modifiable Impacts Requirements table that lists the requirements that the selected requirement impacts. If the selected requirement changes, it will affect those requirements on Impacts Requirements. Each requirement listed is a live link to open that requirement.

What's the Impacts Components table?

The Dependency Summary tab of requirements specifications has a read-only Impacts Components table that collects components from all the requirements in the structure. The Dependencies tab of requirements has a modifiable Impacts Components table, that lists the components that the selected requirement impacts. If the selected requirement changes, it will affect those components on Impacts Components. Each requirement listed is a live link to open that requirement. If a component is fulfilled and tested successfully in Concept Design Management, this table displays the updated status.
What's the difference between dependency and impact?

Dependency and depends on means that a requirement’s progress is affected by the progress of another requirement, which could be due to unspecified factors such as, for example, of schedule, priority, or completion. Impacts means that a requirement's progress affects the progress of another requirement. If Requirement A depends on Requirement B, it means Requirement B impacts Requirement A. In this case, you can also say Requirement A is impacted by Requirement B.
Approving, Versioning, and Exporting Requirements

Submitting a Requirements Specification for Approval: Overview

Approving a requirements specification is not mandatory, but the review and approval process helps to codify the completion of the requirement design work. An approved requirements specification is locked from further updates. You can submit a requirements specification for approval by selecting Submit for Approval from the Actions menu. The Submit for Approval dialog allows you to select who needs to review and approve. Reviewers can also comment on the requirements specification. When you have finished adding reviewers, click the Submit button. Once a requirements specification is approved, although it cannot be further modified, it can be saved to a new version for further modification.

Approving or Rejecting a Requirements Specification: Explained

After a requirements specification is submitted to reviewers, each one sees a new task in their Work list displayed in the Overview pane of the Concepts page. The reviewer clicks the task link, opening the details of the task. The details and history of the requirement approval is displayed, so the user can see who has already approved or rejected, along with other information. The user clicks the Approve button or Reject button. When all reviewers have approved the requirements specification, its Status changes to Approved; no further modifications of the requirements specification are possible. If the requirements specification has been rejected, its Status reverts to Draft, which permits further modifications, as well as a renewed submittal for approval.

FAQs for Approving, Versioning, and Exporting Requirements

How can I submit a requirements specification for approval?

With a requirements specification open, open the Actions menu and select Submit for Approval. The Submit for Approval dialog opens, which has an
Actions menu and icon to Select and Add. The Select and Add: Reviewers dialog opens, and you can search to find approvers and observers. (Note the team of reviewers that you select for this business object’s routing is different from the Manage Team action.) Select from the returned results, and click OK. You can run additional searches for reviewers. When you are done, click the Submit button and the requirements specification is sent to them. Its status changes to Submitted, and it cannot be sent for approval in its current form again.

What’s the difference between a managed team and an approval or review team?

When the Manage Team action is executed on a requirements specification, users are selected who will have access to read and modify the object. When the Submit for Approval action is executed on a requirements specification, users are selected who will be notified of a Work list task to Approve or Reject the object. Note that a user, who may be sent a requirements specification to approve, may not have access to read or modify the requirements specification itself.

Can I change the version of a requirements specification?

No, the Version field of a requirements specification cannot be changed until it is approved. When a requirements specification is approved, it becomes read only, and Save As New Version appears in the Actions menu on the Edit Requirements Specification page. Choosing this action creates a new, modifiable requirements specification with a new Version number.

What happens when a requirement is modified? And what does a blue dot next to a requirement on a Dependencies table mean?

When you modify a requirement, you may be making changes appropriate to the requirements specification that you are working on. But that requirement may appear in earlier versions of the requirements specification, as well as in other requirements specification structures. Although a requirements specification has a Version counter, a requirement does not have counted or system-controlled versions. So, what are the ramifications when requirements are changed?

Consider, for example, Requirement T-1, in a structure of a requirements specification, RS-10 Version 1, which is approved and released, and so RS-10 Version 2 is created in the system. Now, T-1 is modified as part of RS-10 Version 2, which we will designate with T-1a.

In this case, two things happen. The first ramification is that the original RS-10 Version 1 now displays a blue dot next to T-1 in its structure. This icon tells a
user that there is a newer, modified iteration of requirement T-1 in the system. Also, hovering over the blue dot displays a system message that says it has been Modified in Later Version.

T-1a might not even be in another requirements specification yet, as in this example, but T-1 is no longer the latest iteration of that requirement. RS-10 Version 1 is no longer active, but it may be, in a period of time, that many requirements in its structure will have been modified as they evolve, and these will all display the blue dot in that original requirements specification.

A second ramification is this: consider another requirements specification, RS-20, and in its structure are two requirements, T-8 and T-9, and both of these depend on T-1, that is, T-1 is on the Depends on Requirements table of requirements T-8 and T-9. Then requirement T-1 is modified to T-1a. On the Dependencies tables of both requirements T-8 and T-9, requirement T-1 now has a blue dot next to it. This informs the product manager who is developing RS-20 that he should consider determining whether or not T-8 and T-9 on RS-20 should access T-1a, the newer iteration of requirement T-1.

How can I associate a requirements specification with a product?

With a requirements specification opened, click the Details tab. Click the Product menu and select the appropriate product. This is a simple attribute that, for instance, can be changed, or another version of the requirements specification can be associated to another product. The administrator creates the names of products that appear in this attribute.

How can I associate a requirements specification or requirement with a proposal?

With the Additional Information tab of a proposal opened, click the Select and Add icon to create a relationship with the requirements specification or requirement.

How can I associate a test case with a requirement?

According to the situation, you can use either a dependency or a relationship. Dependencies imply stricter control than relationships, because you cannot delete a requirement if it impacts another requirement.

How can I export a requirements specification?

With a requirements specification open, click the Actions menu, then select Export. Choose the format in which the exported file will be saved, between HTML, Adobe PDF, XML, or Microsoft Word. With each choice, you will be
prompted to **Open** or **Save** the file; if you choose to save the file, you will be prompted to **Browse** to a location on your machine and to enter a **File name**.
Creating Feature Sets: Overview

As a product is developed, some features may be tabled from the initial product release, to be added in future releases. A feature set provides a way to develop a roadmap of product features across different proposals. For example, there may be different releases of a product, with each release having its own proposal. A feature set maintains a list of features supported in each proposal, which clarifies which features would be available in any release of the product.

The Feature Set is the top level of a structure of features. Features and other product enhancements are created and added to the structure below a feature set.

In the Tasks pane on the Concepts work area, use the Create Feature Set link to bring up the dialog. A name is required. Entering text into the Description field is optional but useful, as content in the Description field is searchable.

The creation of features, that is, separate feature lines that are part of a structure under a feature set, is accomplished by clicking the Manage Feature Sets link to find a feature set to which to add features.

Building a Structure of Features: Explained

Feature sets are supported and enriched by structures built of features. A feature set and its structure of features is displayed and managed in the left, Feature pane of the Edit Feature Set page. Features are created as needed, and are added to the structure.

Editing a Structure of Features: Overview

In the left, Features pane of the Edit Feature Set page, you can manage its structure and content. Many of the following actions are also available through icons on the menu bar, next to the Actions and View menus.
From the **Actions menu**, use **Create** to add a feature to the structure below the selected feature. Use **Move Up** and **Move Down** to adjust the order of its features. Use **Increase Indent** and **Decrease Indent** to adjust the parent-child hierarchy of the features. The Indent commands execute the move inwards or outwards if its internal logic permits. No modification of the structure is committed until you click **Save**.

In the right, **Feature: [named object]** pane, proposals can be added to the feature, and proposals can be opened and modified. There are two view icons, one for **Standard view** and one for **Table view**, which lets you see and modify features and proposals in a table layout. The **Actions menu** above the right pane allows the **Manage Team** and **Delete** actions.

**FAQs for Feature Sets and Features**

**What's the difference between a feature set and a feature?**

A feature set is the top level of a structure, or collection, of features.

A feature may describe enhancements to an existing feature or capability of the product, over future releases. Or, a feature may address the addition of a new feature to an existing product or assembly or other objective of the feature set.

**How do I create a feature set?**

Click the **Create Feature Set link** on the Concepts page. Then enter a name and other values in the dialog. When you are done, click the **Save and Close button**. The new feature set appears, and you can modify it.

**How do I create a feature?**

With a feature set or feature selected, click the **Actions button** on the menu bar of the Features pane and select **Create**. Enter information for the new feature in the dialog. When you click **OK**, the feature is added to the structure. From then on, the feature can be searched, viewed, and modified. It can be moved in the structure, added to other structures, and removed from the structure. You can also right-click the mouse in the structure and use the context menu to create and add a feature.

**How can I associate a proposal with a feature set?**

With a feature set open and selected on Edit Feature Set: [named object] page, click the **Select and Add icon** in the Proposals table in the right pane. The **Select
and Add: Proposals dialog appears, where you can simply click the Search button, or use the fields to define search criteria; when you are done, click the Search button. Select one or more proposals from the returned results, and click OK. You can click Apply if you want to continue Search and Add Proposal instead of exiting the search dialog. Click Save to preserve the feature set with added proposals.

When proposals are added to the Proposals table of a feature set, the same set of proposals are populated on the read-only Proposals table of each of the child features.
Viewing and Creating Ideas

Posting an Idea: Overview

When an employee or trusted partner wants to create an idea, he opens the Manage Ideas page to access the Post Idea button. Besides giving the new idea a name, a required field is Type.

The assigned type allows finding and grouping similar ideas. Your administrator creates the idea types for your company, and defines specific attributes for each idea type.

These attributes can be edited in the Edit Idea page. When an idea is created, the type can no longer be changed.

Ideas Overview Page

In the Ideas work area, the Overview page provides access to existing ideas via search. It has regions such as Latest Updates, Customer Ideas, and Top Contributors. These are detailed in the following FAQs.

FAQs for Viewing and Creating Ideas

What's the difference between the Top Customer Contributors chart and the Top Contributors chart?

A customer contributor is an external customer or partner who contributes ideas. A contributor is an internal user, someone who works at your company and who contributes ideas.
Customer idea contributions are summarized in the Customer Ideas region of the Overview page. Internal idea contributions are summarized in the Top Contributors region of the Overview page.

**What are Customer Ideas?**

The Customer Ideas region of the Overview page displays the status of ideas that have at least one customer association. It also lists the top five customer contributors.

**What are Top Contributors?**

The Top Contributors region of the Overview page displays the five internal users who have contributed the most ideas. Each total is displayed with a breakdown by status of the ideas.

**How do I create an idea?**

Click the Post Idea button, which is on the Manage Ideas page. Then enter values for the fields in the dialog. There are required fields, such as entering a name for the idea, and choosing a Type.

**How can I delete an idea?**

Select an idea from Search Results table on Manage Ideas page, then click the Edit button. On the Edit Idea page, open the Actions menu, and select Delete. You will be prompted to continue or cancel the action.
Managing and Reviewing Ideas

Editing and Managing Ideas: Overview

You can edit the name, description, and status of an idea. When an idea is created, the Edit Idea page appears with the idea available for editing. The left pane displays details and the Relationships table. Although no relationships have been established, they can be added immediately. The right pane displays the Vote Summary and Comments areas. Again, there are none in the new idea, but the originator can add and publish a comment right away.

On the Manage Ideas tab, when an idea is listed or returned by search and then selected in the left pane, the right pane displays the details and the Relationships table. Basic search mode provides a simple text field. Advanced search mode provides additional fields to refine your search criteria.

Associating Customers with Ideas: Explained

An idea can be associated to a customer or customers by clicking the Associate Customers icon on the Edit Idea page. The Associate Customers dialog appears. The list of Available Customers is created with the Manage Customers dialog on the Overview page.

Adding Relationships and Attachments: Explained

The Relationships table lets you add more information to the idea. Links to other objects in Innovation Management or in Agile Product Lifecycle Management can be added. You can also add File and URL attachments to better describe the idea. Files are uploaded to the Fusion Content Server, and are the basis for a thumbnail picture to be generated. The chapter Managing Requirements and Dependencies has more information about relationships and attachments.
Commenting on Ideas: Explained

Comments can be added to an idea by anyone who is permitted to create and search ideas. Comments are used to contribute to a discussion about the proposed idea. The more that an idea with merit is collaborated on at this stage, the greater likelihood that it could evolve into a proposal, a design, and eventually a product. Comments can be added to an idea by clicking the Comments link in [named object]: Details pane on Manage Ideas page. You can also leave a comment in the Comments panel on Edit Idea: [named object] page. In both sequences, click Publish when you are done; no further action is required.

Voting on Ideas: Explained

Every user can click a simple vote as to whether he likes a specific idea or dislikes it. This is another means that helps product managers to assess the usefulness and acceptability of the idea. The Likes icon or Dislikes icon to register your opinion and keep a tally of votes on each idea. Votes can be added to an idea by clicking the Likes or Dislikes link in the Your Vote area on [named object]: Details pane on Manage Ideas page. You can also vote in the Vote Summary panel on the Edit Idea: [named object] page. In both sequences, when you have voted, no further action is required.

Tagging an Idea: Explained

The Tag icon is a live link that lets you tag an idea with keywords that show trends, and contribute to finding similar ideas. The Tag This Item dialog appears, where you can provide all the tags you want for the idea. Later you can find ideas by selecting a tag from the tag cloud.

Accepting Ideas: Explained

New ideas are given a status of Draft. After reviewing and further detailing or enriching an idea, you may accept or reject it. On the Edit Idea: [named object] page, select Accepted or Rejected in the Status field, then save the idea. The idea’s status is displayed on the Details page and Edit Idea page. You can search ideas based on their status.

FAQs for Managing and Reviewing Ideas

How can I manage my customer list?

On the Ideas Overview page, use the Actions menu to open the Manage Customers dialog. You can create, rename, delete, and organize the customers or
partners who create ideas for your company. You can also export your customer list to Excel.

How can I convert an idea into a proposal?

Create a proposal, then associate it to the idea with a relationship.