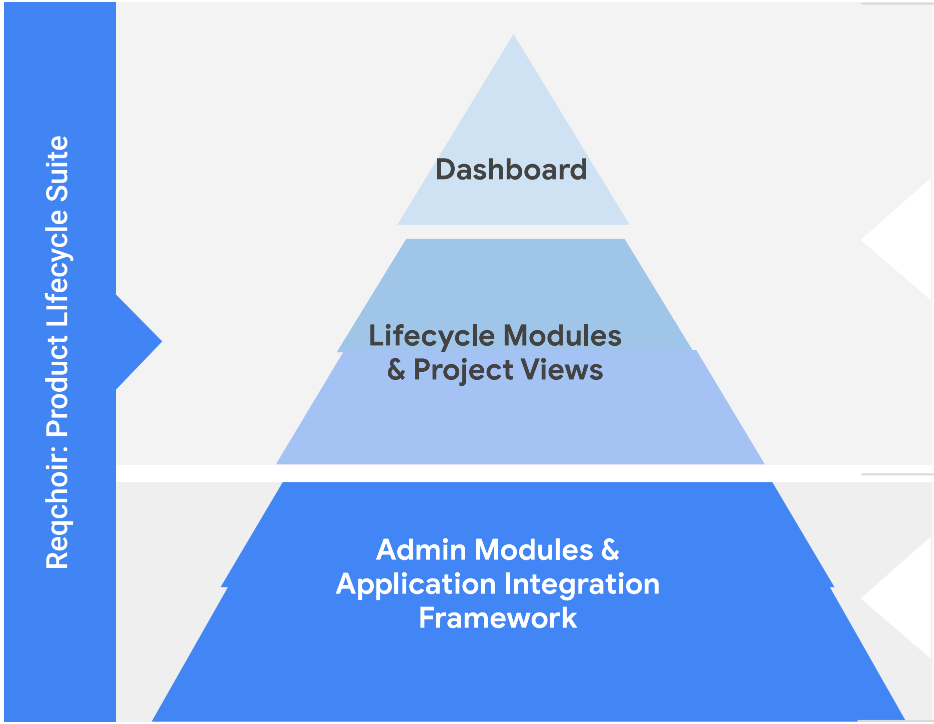
# Alignd Labs

# Reqchoir User Guide

alignd labs


1. Intro & Overview
2. Dashboard & Navigation
3. Functional Modules
4. Administrative Tools

# Unified, Adaptive Information Structure




### Global Project Dashboard:

Reqchoir's project dashboard provides an executive level overview of cross-functional initiatives that help drive your business. This is the starting point for all users, regardless of purview or function.

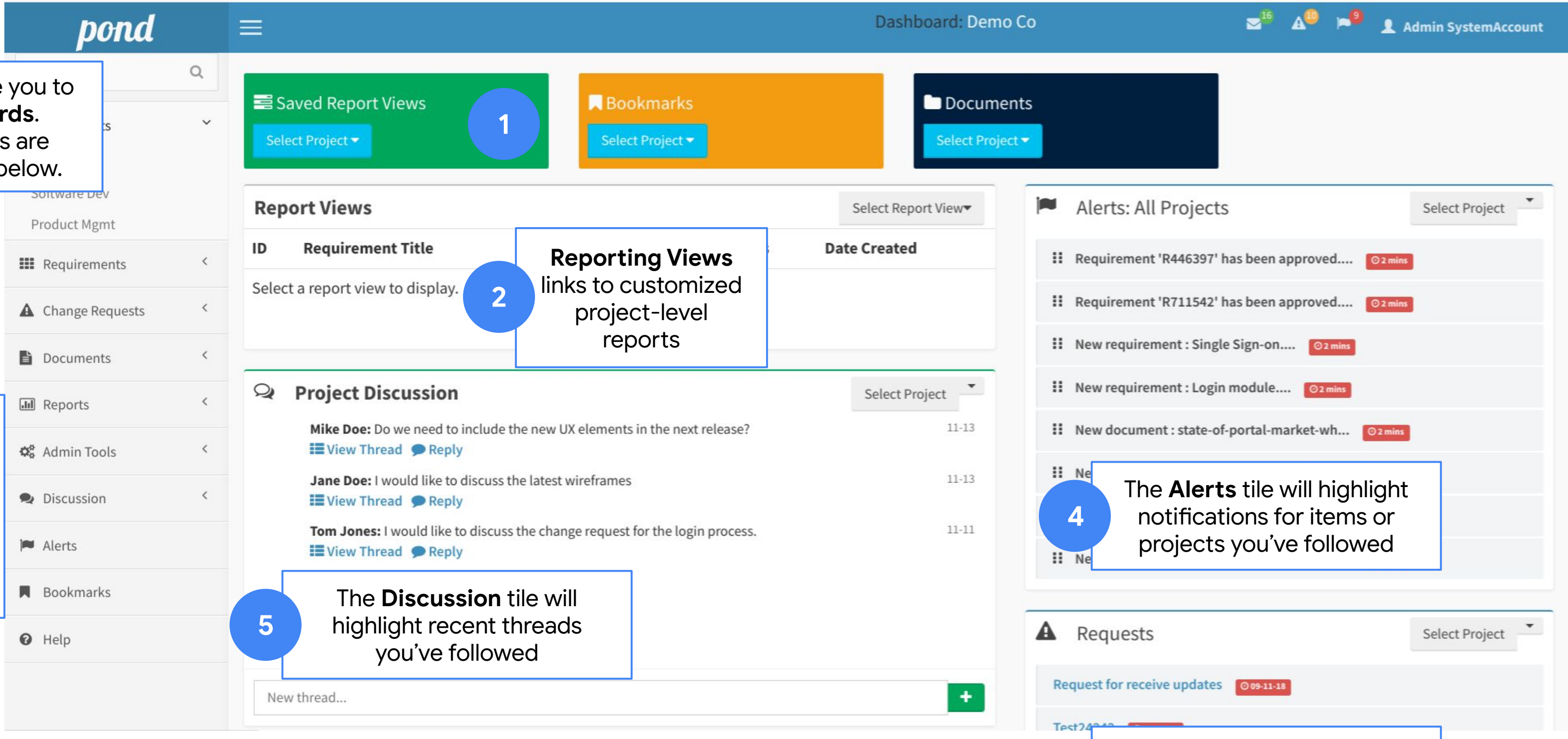
### Lifecycle Modules:

The Lifecycle Modules support specific workflows including requirements and change management, documents, and reporting. Since “one-size doesn’t fit all”, each project may leverage these modules in customized ways to make information most meaningful.

### Admin Modules & API Framework:

Admin modules empower super users with tools to manage users and access rights, predefined security policies and distribution groups, custom datasources and batch updates, as well as options for leveraging Reqchoir's API framework for more granular integrations.

# Navigation: Dashboard




1 Drop-downs will take you to **project dashboards**. Functional Modules are organized in "tiles" below.

1

2 **Reporting Views** links to customized project-level reports

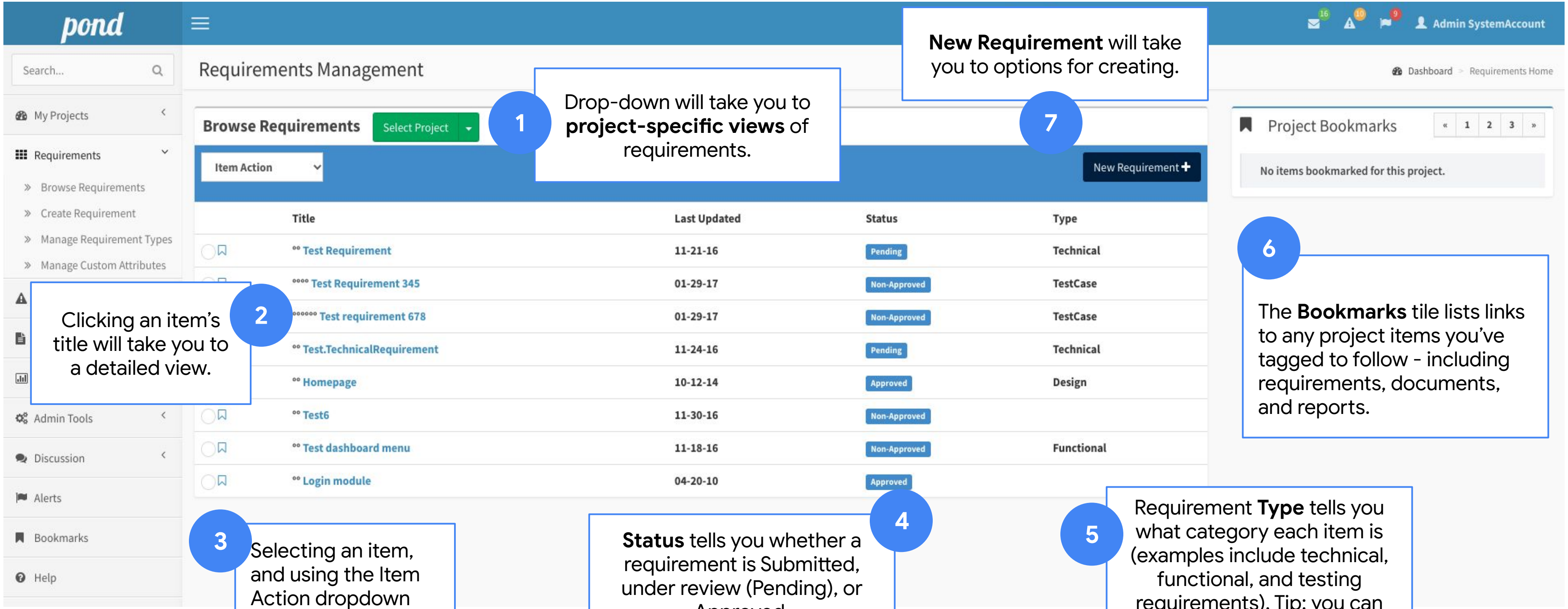
3 Expandable toolbar at left links to functional modules (e.g. Requirements, Issues, Reporting, Documents, and Admin settings)

4 The **Alerts** tile will highlight notifications for items or projects you've followed

5 The **Discussion** tile will highlight recent threads you've followed

6 The **Requests** tile will highlight new or updated change requests

# Modules: Requirements Management




1 Drop-down will take you to **project-specific views** of requirements.

2 Clicking an item's title will take you to a detailed view.

3 Selecting an item, and using the Item Action dropdown menu, gives you options for editing or deleting a requirement.

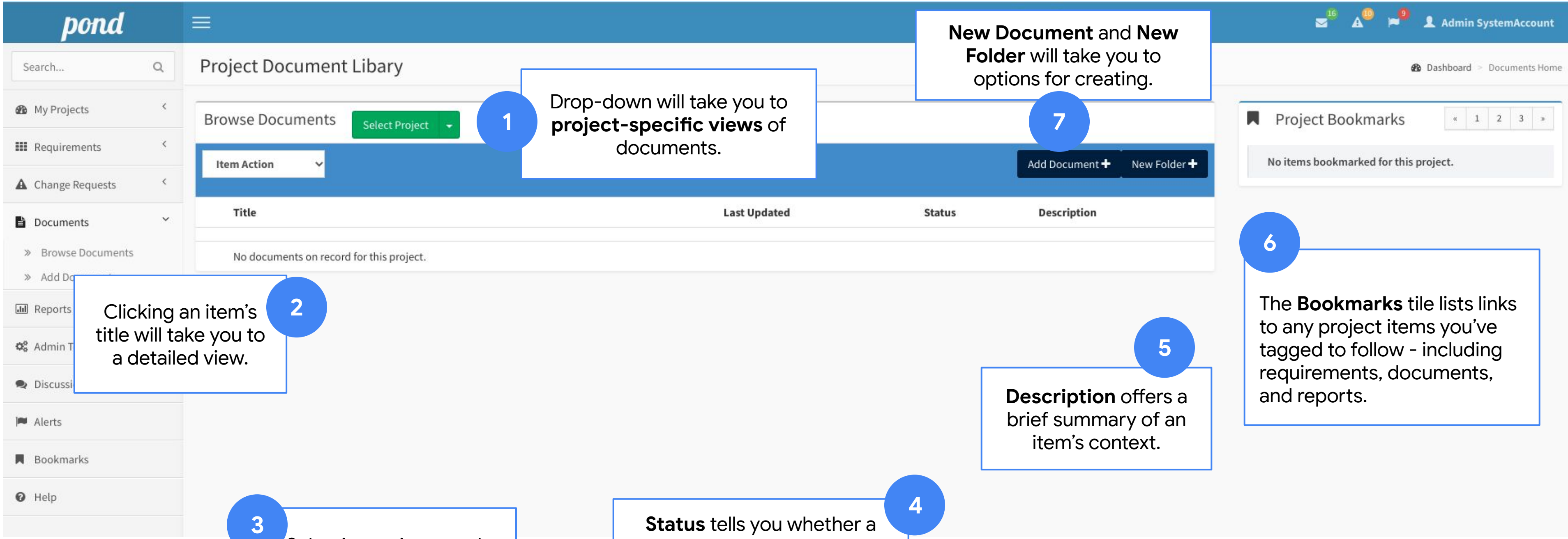
4 **Status** tells you whether a requirement is Submitted, under review (Pending), or Approved.

5 Requirement **Type** tells you what category each item is (examples include technical, functional, and testing requirements). Tip: you can create reports to filter on Type!

6 The **Bookmarks** tile lists links to any project items you've tagged to follow - including requirements, documents, and reports.

7 **New Requirement** will take you to options for creating.

# Modules: Document Management




1 Drop-down will take you to **project-specific views** of documents.

2 Clicking an item's title will take you to a detailed view.

3 Selecting an item, and using the **Item Action** dropdown menu, gives you options for editing, deleting, or exporting a document.

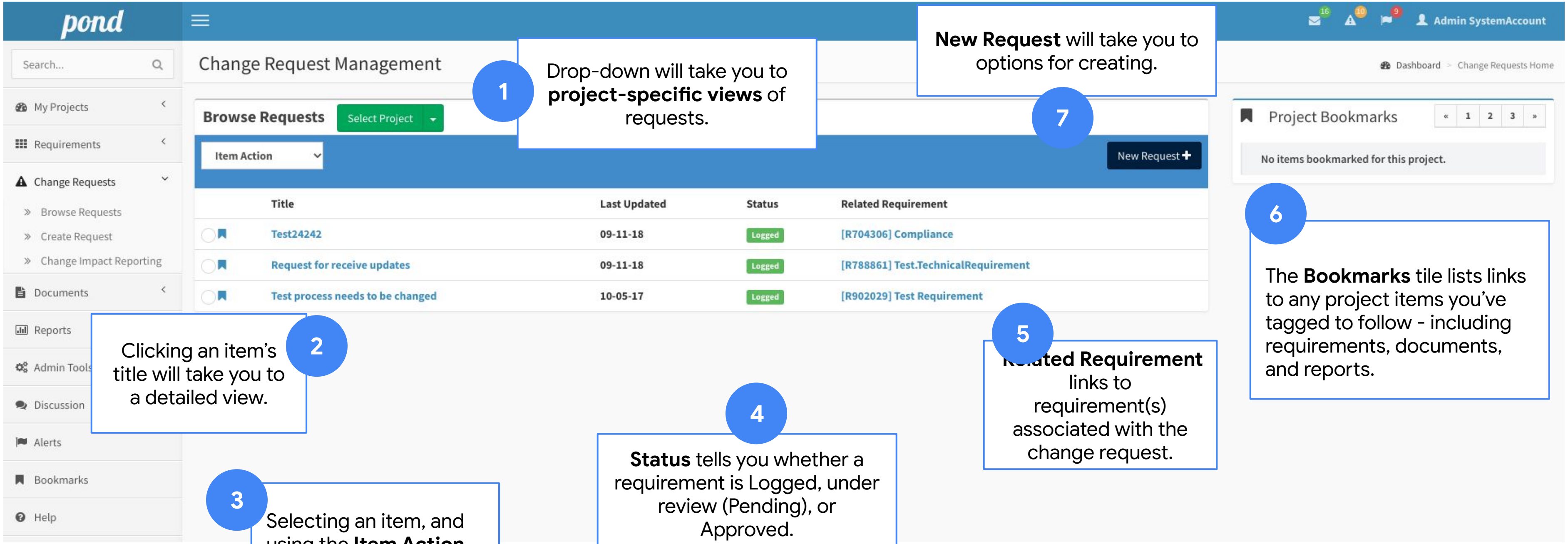
4 **Status** tells you whether a requirement is Submitted, under review (Pending), or Approved.

5 **Description** offers a brief summary of an item's context.

6 The **Bookmarks** tile lists links to any project items you've tagged to follow - including requirements, documents, and reports.

7 **New Document** and **New Folder** will take you to options for creating.

# Modules: Change Management




1 Drop-down will take you to **project-specific views** of requests.

2 Clicking an item's title will take you to a detailed view.

3 Selecting an item, and using the **Item Action** dropdown menu, gives you options for editing, deleting, or otherwise modifying a request.

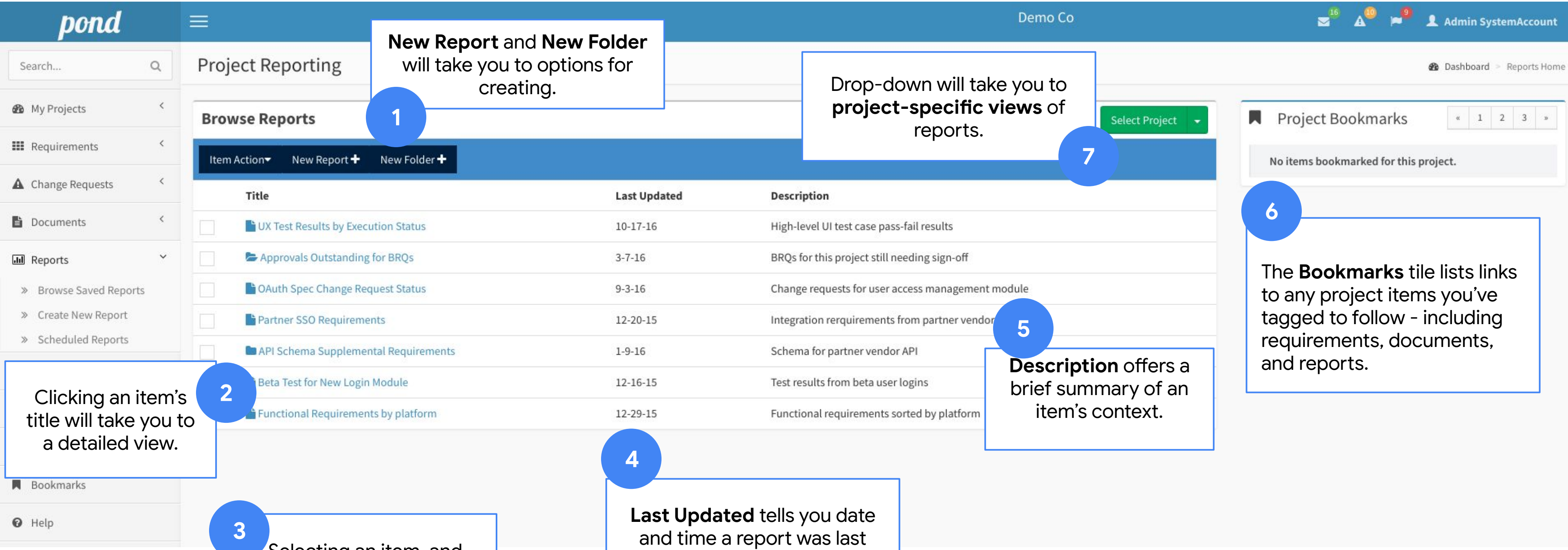
4 **Status** tells you whether a requirement is Logged, under review (Pending), or Approved.

5 **Related Requirement** links to requirement(s) associated with the change request.

6 The **Bookmarks** tile lists links to any project items you've tagged to follow - including requirements, documents, and reports.

7 **New Request** will take you to options for creating.

# Modules: Reporting




1 — **New Report** and **New Folder** will take you to options for creating.

2 — Clicking an item's title will take you to a detailed view.

3 — Selecting an item, and using the **Item Action** dropdown menu, gives you options for editing, deleting, or exporting a report.

4 — **Last Updated** tells you date and time a report was last edited or new version saved.

5 — **Description** offers a brief summary of an item's context.

6 — The **Bookmarks** tile lists links to any project items you've tagged to follow - including requirements, documents, and reports.

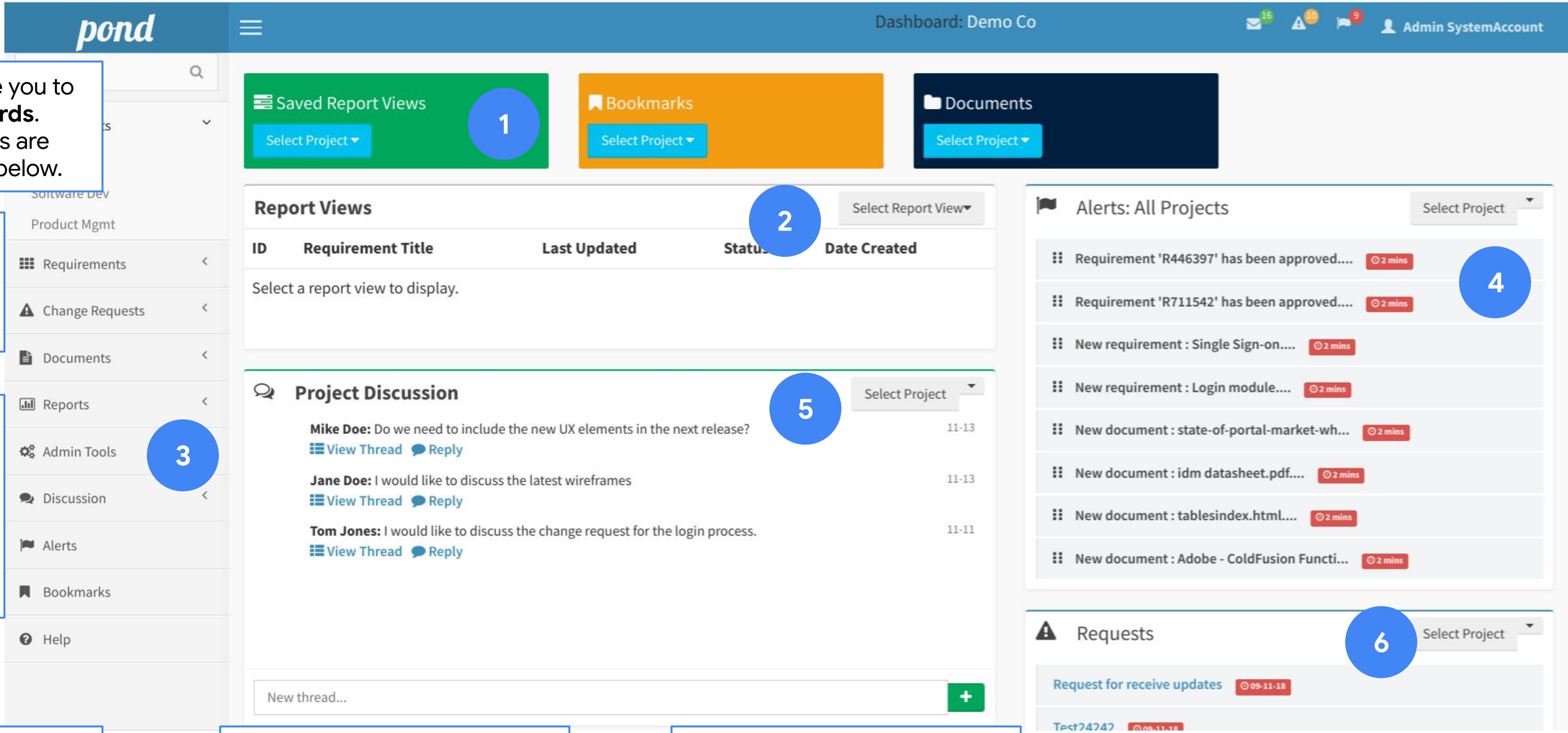
7 — Drop-down will take you to **project-specific views** of reports.

# Modules: Admin Tools

1 Drop-downs will take you to **project dashboards.** Functional Modules are organized in “tiles” below.

2 **Reporting Views** links to customized project-level reports

3 Expandable toolbar at left links to functional modules (e.g. Requirements, Issues, Reporting, Documents, and Admin settings)

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# Key Terms & Definitions

| Term | Definition |
|---|---|
| **Requirement** | A unit of information that describes a required feature or capability. |
| **Requirement Type** | Requirements may be grouped and labeled into types (e.g. Functional, Technical) which have their own descriptors (e.g. Version#, Platform, etc) |
| **Change Request** | A request to modify one or more aspects of a requirement. |
| **Change Impact Matrix** | A view of the ripple effect caused by changing one or more requirements that are associated with (and impact) other requirements. |
| **Report Filter, Report View** | Filters and Views are the same thing: they save a set of datapoints and sorting preferences, which can be run ad hoc at any time (against current data). |
| **Scheduled Report** | Scheduled reports use a saved Report Filter, to run at a specified time or recurring frequency, and save and / or send the resulting report. |
| **Distribution List** | Distribution Lists are subsets of project users; notifications and security policies rely on Lists. |
| **Project Baseline** | Saving a Baseline creates an archive of a projects current data, settings, user permissions,  and documents. |
| **Security Policy** | Security policies govern which users can access a project, and what they are able to do within it (e.g. view, create, edit, delete project assets). |

Remember...with Reqchoir, you can get started quickly with standard datasets, and customize later as needed.

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