



Dimensions® RM 12.8

RM Browser User's Guide

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Preface

This document describes how to use the RM Browser client for Dimensions RM, a comprehensive requirements management package that allows development teams to capture, engineer, and manage requirements throughout the entire product lifecycle.

Objective

The purpose of this document is to describe how to use Dimensions RM after the product is installed.

Audience

This document is intended for members of product development teams who use Dimensions RM to create, manage, and track requirements during the product lifecycle.

Contacting Technical Support

Serena provides technical support for all registered users of this product, including limited installation support for the first 30 days. If you need support after that time, contact Serena Support at the following URL and follow the instructions:

<http://supportline.microfocus.com>

Language-specific technical support is available during local business hours. For all other hours, technical support is provided in English.

The Serena Support web page can also be used to:

- Report problems and ask questions.
- Obtain up-to-date technical support information, including that shared by our customers via the Web, automatic e-mail notification, newsgroups, and regional user groups.
- Access a knowledge base, which contains how-to information and allows you to search on keywords for technical bulletins.
- Download fix releases for your Serena products.

License and Copyright Information for Third-Party Software

For license and copyright information of third-party software included in this release, check the file `Third_Party_Licenses.txt`, which can be found in the Dimensions RM installation directory, e.g. `C:\Program Files\Micro Focus\Dimensions 12.8\RM`.

Chapter 1

RM Browser Basics

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Overview

RM Browser provides all user access to Dimensions RM functions. In RM Browser, you can do the following:

- View query results generated in real time from existing filters and scripts
- Create new queries and optionally save them as filters or scripts
- Edit queries
- Print or save query results
- Print individual requirements
- Create, update, replace, delete, and remove requirements
- View file attachments and add file attachments to requirements
- Create new discussion threads and participate in existing ones
- Submit change requests and associate them with a single Engineering Change Proposal (ECP) requirements
- Accept or reject change requests
- Create and traverse links between requirements
- Create and modify polls about specific requirements, vote in polls, and view current poll results
- Add requirements to or remove requirements from collections; and create, delete, and rename collections
- Associate collections to Dimensions CM projects, and associate Dimensions RM requirements to Micro Focus Dimensions® CM requests
- Create baselines from collections
- Organize requirements and scripts within categories. Categories are used to restrict the visibility of parts of the RM instance based on user groups.
- View, create, and modify requirements and chapters in a hierarchical document-like structure, and optionally export those document-like structures as Microsoft® Word documents
- Create and edit traceability reports in which you can analyze linkages between requirements, edit requirements, and print traceability reports
- View and clear links that are considered "suspect"
- View the history of a requirement
- Merge changes to documents, chapters, and requirements that were made by users making changes at the same time
- Unlock chapters and requirements that were locked by another user so that you can edit them

Common Terms

The following sections describe the most important terms in detail. For other terms, refer to the ["Glossary" on page 401](#).

Document

A document is a hierarchical arrangement of chapters and requirements that can be edited. You can create a document from within Documents View, import it through one of RM Browser's import functions, or by the RM Import tool. For further information about documents, see chapter ["About Documents" on page 168](#).

Snapshot

A snapshot is a "frozen" version of a document.

Report

A report allows you to query the database of Dimensions RM. Depending on the report type the result may be presented in a table, or graphically. Reports can be created either through the wizard, or by using the SQL like script language. For more information see chapters ["Working with Reports" on page 245](#) and ["Script Syntax" on page 381](#).

Collection

A collection allows to group requirements of any class. Once a collection is created, it can be associated with a requirement by linking the requirement to the collection. Each requirement can be linked to many different collections, and each collection can be linked to many different requirements. Parent collections contain child collections. Child collections contain requirements. Parent collections are not directly linked to any requirements, only linked indirectly through their child collections. See also [Baseline](#).

Baseline

A baseline is a stable, unchangeable group of requirements. Baselining a collection ensures that the collection will never change.

Container

A container is the generic term for the various types of sets of requirements in Dimensions RM. A requirement may belong to one or any number of named containers, or may exist outside all containers. Containers are not restricted by class and may span the entire instance. Multiple versions of a requirement may exist in the same container, but typically only one version is utilized in a given container.

You can store requirements in any of these containers: [Document](#), [Snapshot](#), [Collection](#), and [Baseline](#).

Attributes

Attributes allow users to enter or select data and are represented by a text box, list, or other control (see chapters ["Common Dialog Controls" on page 33](#) and ["Attribute Types" on page 27](#)). Only administrators can define attributes.

System Attributes

System attributes are attributes that exist for any item in Dimensions RM. By default, they are shown in section **System Attributes** of the **Edit Attributes** dialog (see chapter ["Editing a Requirement" on page 114](#)).

These system attributes exist in Dimensions RM:

Display Name	Internal Name	Description
Created By	CREATED_BY	Shows the user name who created the version of the requirement.
Current Status	STATUS	Shows the status of the requirement, e.g. Current, Replaced, Proposed.
Initial Created By	INITIAL_CREATED_BY	Shows the user name who created the first version of the requirement.
Initial Time Created	INITIAL_TIME_CREATED	Shows the date and time when the first version of the requirement was created.
Modified By	MODIFIED_BY	Shows the user name who updated or replaced the current version of the requirement.
Notification	RTM_NOTIFICATION	Shows if e-mail notification for a project has been configured. Possible values: <ul style="list-style-type: none"> ■ Yes: Enabled ■ No: Disabled If no value has been specified, e-mail notification for the project has not been configured.
Object ID	OBJECT_ID	Shows the ID for the requirement.
Object Version ID	OBJECT_VERSION_ID	Shows the version count for the requirement. Each "Replace" operation increases this ID.
Requirement Link	REQUIREMENT_LINK	A link which allows you to access the requirement directly.
Suspect	SUSPECT	Shows if a requirement is considered suspicious. See chapter "Suspect Links" on page 128 for more information.
Time Created	TIME_CREATED	Shows the date and time the current version of the requirement was created.

Display Name	Internal Name	Description
Time Modified	TIME_MODIFIED	Shows the date and time the requirement was updated or replaced.
<May vary>	PUID	The PUID is a persistent unique identifier. It is often prefixed, e.g. MRKT_ for "Marketing Requirement".

Categories

Categories are represented by a hierarchical structure inside each Dimensions RM instance, with sub-categories supported. Categories work like folders on a file system, with sub-categories supported, with "favorites" selected such that an individual user can set and easily access defaults. For further details about categories, see chapter ["About Categories"](#) on page 340.

Main Pages of the RM Browser Interface

The RM Browser displays a Menu Bar that provides access to a series of menus (drop-down lists) and the buttons responsible for changing the page or view. The following describes the the major settings:

Home: Often referred to as the "Home View", this is the browser page used to select and set the Category, to define and display Dashboards, to open and/or review a Document, Requirements, Reports, Collections, or Baselines. Dependent upon the object type accessed, relevant operations may be selected from the Actions pane. To display the Home View, click .

Category: The category (or categories) selected from the Home View will limit the objects to be included for selection and/or display from any RM view or filter.

Home View tabs include **Dashboards, Documents, Requirements, Reports, Collections, Baselines**, and, if defined, the **Glossary**; all are described in detail elsewhere in this document.

- **Document:** The document tab presents a list of available documents, depending on the category selected. Once opened, the document view provides a document-like presentation of requirements, with a table of contents, chapters, and subchapters. From an open document, users can add, delete, move, and edit chapters and requirements. The left pane is the navigation tree that represents the table of contents. The middle pane is the detail pane, and displays information based on the user selection. The right pane is the Actions pane, and displays functions relevant to work within the document view.
- **Requirements:** The requirement tab brings Quick Search to the home page in a display that includes access to standard filters as well as distribution graphs.
- **Class Report:** Displays the results of queries within a single class. As with most requirement views, the selected requirements can be listed in Editable Grid, Grid, or Form view.
- **Relationship Report:** Relationships define interactions between classes of requirements, and these are defined by the administrator in the RM instance schema. This page displays the results of queries built using defined relationships. Users can view the requirements in Editable Grid, Grid, or Form view.
- **Traceability Report:** Traceability is a way to analyze the linkages (relationships) between requirements.
- **Collection:** Displays the requirements included in a selected collection. You can view the requirements in Editable Grid, Grid, or Form view.
- **Baseline:** Displays the requirements included in the baseline that you selected on the Home View. You can view the requirements in Editable Grid, Grid, or Form view.

Tabs **Documents, Collections, and Baselines** provide the following information for each document, collection, or baseline:

- **Name:** The name of the document, collection, or baseline.
- **Time Created:** The date and time the document, collection, or baseline was created.
- **Time Modified:** The date and time of the most recent change of the document, collection, or baseline.

- **Modified By:** The name and/or user name of the person who made the most recent change of the document, collection, or baseline.
- **Owner:** The name and/or user name of the person who created the document, collection, or baseline or was assigned to own the it in a Workflow.
- **State:** The Workflow state of the document, collection, or baseline.

Requirements View: The view that provides users with the ability to list, sort, view and modify requirements. Clicking on the **Requirements** tab on the Main Page will take the user to Quick Search the default function of the requirements view, as it is the basis for all requirements listed. Also accessible from this tab is the Split View, listing requirements on both sides of a selected relationship. If branching is in use, selections for Branch View and Synchronize View will also be available.

General Navigation and Controls in RM Browser

See the following subsections for an overview of the main navigational and control elements of the RM Browser interface:

- ["Welcome Menu" on page 21](#)
- ["Menu Bar" on page 22](#)
- ["RM Instance Bread Crumb" on page 22](#)
- ["Categories Pane" on page 23](#)
- ["Recent Items" on page 25](#)
- ["Actions Pane" on page 25](#)
- ["Favorites" on page 26](#)
- ["Attribute Types" on page 27](#)

Welcome Menu

 Welcome, Joseph Wilson ▾

Change Password

Help

User Settings

Notifications

About

Log Out

The Welcome menu appears at the upper right of all RM Browser's main window. Clicking it opens a sub-menu which includes the following entries:

- **Change Password:** This opens the **Change Password** page. See ["Changing Your Password" on page 58](#).
- **Help:** This opens the RM Browser help. See ["Getting Help" on page 59](#).

- **User Settings:** This opens the **User Settings** dialog, where you can override the instance settings, e.g. which attributes are displayed in the **Quick Search** results. See "[RM Browser Basics](#)" on page 15.
- **Notifications:** This opens the **Notifications** dialog, where you can enable and disable e-mail notification settings for your user account. See "[Enabling and Disabling E-Mail Notifications](#)" on page 59.
- **About:** This opens the **About Dimensions RM** dialog. It displays information such as the version of Dimensions RM and the operating system of the server. See "[Viewing Version, System, and Contact Information](#)" on page 67.
- **Log Out:** This ends your RM Browser session and displays the **Log In** page. See "[Logging Out](#)" on page 58.

Menu Bar



This appears at the upper left of all RM Browser pages. It includes the following menus and buttons:

- : Opens the Home View. For more information on the Home View, see chapter "[Working with the Home View](#)" on page 227.
- **New:** This menu opens the dialogs that create new items, such as requirements, reports, documents, collections, and baselines.
- **Requirements:** This button opens the Requirements view which allows easy searching, editing, deleting and exporting of requirements. For further information on the Requirements view, see chapter "[Exporting Requirements](#)" on page 98.
- **Agile:** This button is only available, if it has been enabled by your administrator. Clicking this button opens the Agile View. For further information about Agile, see chapter "[Agile](#)" on page 309.
- **Import:** This menu opens the dialogs that import external content, such as CSV, Microsoft Word, and XML files into RM requirements. See chapter "[Importing Requirements](#)" on page 283.
- **Administration:** This menu opens dialogs for administrative functions, such as managing and organizing categories, breaking user locks on documents and requirements, and configuring default and/or higher level settings for RM Browser behavior (which is the behavior all users see unless they override it with their own local user settings). See chapter "[Administration](#)" on page 333.

RM Instance Bread Crumb

The RM Instance Bread Crumb appears at the upper left of all RM Browser pages, just below the Menu Bar.

Standard Bread Crumb:



- The left element displays the RM instance name. Clicking the arrow opens a list of RM instances. Selecting one of these instances switches to that instance. For further

information about switching instances see ["Switching to Another RM Instance" on page 58](#).

To see the database name for the current RM instance, hover over the instance name. This opens a tooltip that shows database name and instance name.

- The right element displays the full category path. If the root category was selected, then the second element will be the same as the left element: the name of the RM instance.

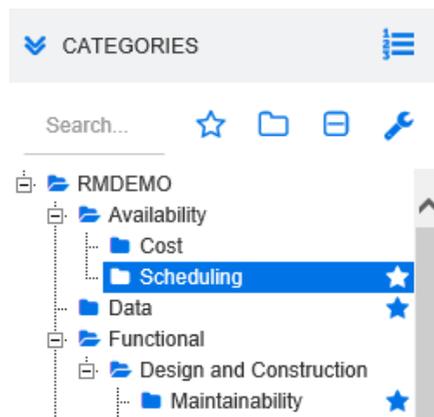
Extended Bread Crumb:

RMDEMO ▾ > > RMDEMO > Collection > Engineering Hot List ▾

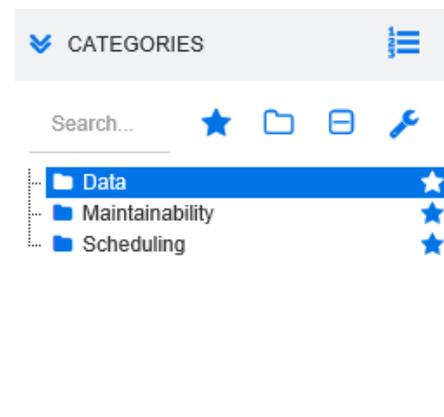
The extended mode is only available for collections, baselines, and reports when opened through a direct URL.

- The left-most element displays the RM instance name. Clicking the arrow opens a list of RM instances. Selecting one of these instances switches to that instance. For further information about switching instances see ["Switching to Another RM Instance" on page 58](#).
To see the database name for the current RM instance, hover over the instance name to open a tooltip that shows database name and instance name.
- The second element is the name of the category that was selected on the Home View. If the selection includes subcategories, the name of the top-most selected category is displayed. If the root category was selected, then the second element will be the same as the first element: the name of the RM instance.
- The third element identifies the type of item that is currently open in the work page. For example, it would say **Collection** if a collection is open.
- The fourth element is the name of the item that is currently open in the work page. It includes a drop-down list from which you can open other items of this type; if any others exist in the currently selected category.

Categories Pane



Standard View



Favorites View

This appears on left side of the Home View. It is where you select the category or sub-categories that you wish to work in. It includes the following elements:

-  **Expand/Collapse:** This button expands or collapses the Categories pane.
- **Search:** This field limits the display in the category tree to those categories that match the search string. The search is dynamic, and increasingly narrows the displayed results as you enter more characters. Potential matches are shown in bold. To return to displaying the full category tree, delete the string from the Search field or click the **X** button in the Search field.
-  **Switch Favorites View:** This button switches between Standard View and Favorite View.
-  **Include sub categories:** When colored, this toggle button indicates that sub categories below the selected category will be included. When grayed out, it indicates that only the selected category will be included.
-  **Collapse all sub categories:** This button collapses any open branches in the category tree, so only the first level of categories below the root are displayed.
-  **Switch to Hierarchy View:** This button shows the requirements of a category in the tree view.
-  **Switch to Category View:** In Hierarchy View, click this button to switch to Category View.
-  **Refresh:** Reloads the list of requirements in Hierarchy View.
-  **New:** This button is available in Hierarchy View only and opens a shortcut menu with these functions:
 - **New Above:** Opens an edit form for creating a new requirement with the same class as the selected requirement. The requirement will be shown above the selected requirement.
 - **New Below:** Opens an edit form for creating a new requirement with the same class as the selected requirement. The requirement will be shown below the selected requirement.

To change the category for a document, snapshot, collection, or baseline:

- 1 Select the object to move in the Home View.
- 2 Drag and drop the object to the desired category in the tree.

To add a category to the Favorites View:

- 1 Move the mouse pointer over the desired category.
- 2 Click .

To remove a category from the Favorites View:

- 1 Move the mouse pointer over the desired category.
- 2 Click .

Recent Items

Users who choose to do so may select the objects to be listed as **Recent** below the Categories tree in the Home View. Choosing, for example, **Documents** will cause the most recent document(s) to be listed, making them easy to select for opening once again. The same is true for **Requirements**, **Reports**, or **Collections**.

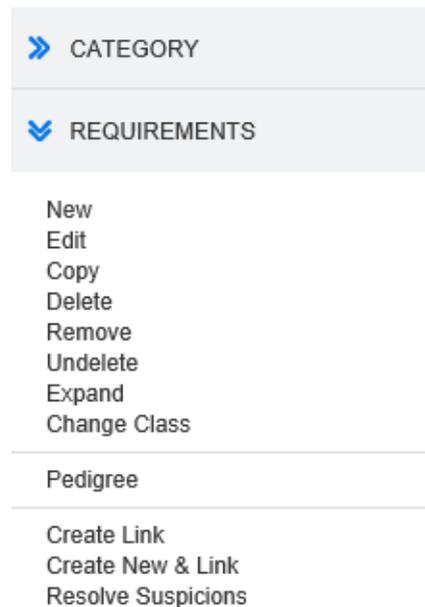
The **Recent** list can be comprised of any or all of: documents, snapshots, requirements, reports, collections, or baselines.

To define the items in the Recent list, do the following:

- 1 Hover with the mouse pointer over the title of the **Recent** list. This shows a cog in the title bar.
- 2 Click the cog. This opens the **Settings** popup.
- 3 Select the options for items you want to appear in the **Recent** list. Clear the options for items you do not want to appear in the **Recent** list.
- 4 Click **OK**.

Note that changing the settings in the **Settings** popup also modifies the settings shown in the **User Settings** dialog (see chapter "[General Settings](#)" on page 74).

Actions Pane



The Actions Pane appears on the right side of all RM Browser pages. It lists the Actions possible in the current context.

These actions are arranged in expandable/collapsible sections.

If an action is grayed out, either you do not have permission to perform this action, or the action does not apply to the requirement(s) selected.

Favorites

Favorites allow you easier access to categories, or often used items (i.e. documents, reports, collections, or baselines) in the Home View. To switch between regular items and favorite items, selecting or clear the **Favorites** check box; for categories you execute the same action by clicking .

To add an item to Favorites:

- 1 Move the mouse pointer over the desired item.
- 2 Click .

To remove an item from Favorites:

- 1 Move the mouse pointer over the desired Favorite item.
- 2 Click .

Attribute Types

Dimensions RM allows users to enter data which are represented by different attribute types. The following table lists these attribute types and the controls through which you can access them.

Attribute Type	Description
Alphanumeric	A single line of text up to 1000 characters.
Calculated	A read-only numeric attribute which is calculated when an attribute specified in the formula is changed.
Date	Allows to select either date or date and time. The date format is defined by the administrator.
File Attachment	<p>The file attachment attribute can hold a single file or multiple files. File attachments are added, viewed, replaced, or deleted by clicking links.</p> <p>To add a file attachment, click  .</p> <p>To delete a file attachment, click  .</p> <p>To replace a file attachment, click  .</p> <p>To view a file attachment, click the file name.</p> <p>By default, file attachment attributes reside in the Attachments section of a requirement.</p>
Group	<p>Like a list attribute, but composed of a series of sub attributes. Each drop down list box depends on its left neighbor.</p> <p>Example: Assume, you have a group of 3 drop down boxes. The middle drop down box shows only those values which are related to the selected value of the left drop down box. The right drop down box shows only those values which are related to the selected value of the middle drop down box.</p> <p>A group list box can have several rows.</p> <p>To add a new (empty) row, click  .</p> <p>To add a new row with the values of the selected row, click  .</p> <p>To remove a row, click  .</p> <p>TIPS</p> <ul style="list-style-type: none"> ■ To have all values added, choose (Select all) from the drop down list; if all are not selected, multi-select has not been activated for this group. ■ To query for an empty value, choose (None) from the drop down list. ■ When using a group attribute as a run-time parameter in a report, you can select if any value must match (OR) or all values must match (AND). This selection is available in a drop down list preceding the drop down lists of the group attribute.



Attribute Type	Description
List (single value)	<p>A list of values configured by the administrator. This list only allows selection of one value.</p> <p>Select Value Next to the list attribute, click the  button to open the Find & Select List Value dialog. For further info, see chapter "Find & Select Dialog" on page 42.</p>
List (multiple values)	<p>A list of values configured by the administrator. This list allows selection of multiple values.</p> <p>Standard Mode</p> <p>If selection of multiple values is allowed, use these modifier keys:</p> <ul style="list-style-type: none"> • Click: Makes a list value a selected value. All other selected values will be unselected. • Ctrl+Click: Add or remove a list value from the selected values. • Shift+Click: Adds all values between the previous selected value and the clicked value to the selected values. <p>Assignment Box Mode</p> <p>In Assignment Box mode, two lists are displayed which allow adding entries to the selection by clicking  and removing entries from the selection by clicking .</p> <p>Select Value</p> <p>Next to the list attribute, click the  button to open the Find & Select List Value dialog. For further info, see chapter "Find & Select Dialog" on page 42.</p>
List (Tag Mode)	<p>Tag Mode is an additional feature for lists, both, single value and multiple values lists. In tag mode, any user having write access for a requirement and attribute can add values to that list. These added values will then be available for any other user for that attribute.</p> <p>Typing into the list box shows entries matching the typed text. To specify a new value, simply enter a text that does not exist in the list of suggested entries.</p>
Check Box(es)	<p>A check box is used as a display option for a list attribute. It allows to easily select or de-select a value. When searching for requirements (e.g. in Quick Search), the related attribute shows the related value, e.g. Yes/No, Approved/Rejected or any other value your administrator defined for the attribute.</p>
Radio Buttons	<p>Radio buttons are used as a display option for a list attribute with more than two values that only allows to select a single value.</p>
Numeric	<p>Accepts only numeric values.</p>

Attribute Type	Description
Text	<p>A block of text up to 65,000 characters. Note that characters which need more than one byte (e.g. Chinese or Japanese characters) decrease the maximum number of characters.</p> <p>If the text attribute has HTML functionality enabled, you can format the contained text, e.g. text color or font style. For further information about HTML formatting see chapter "HTML Text Formatting Toolbar" on page 36.</p>
URL	<p>Depending on its configuration, the URL attribute can hold a single URL, or multiple URLs. For each URL, you can specify the actual URL and the display text. Your administrator may configure URL attributes to be validated (e.g. the URL must point to a specific server).</p> <p>To add a new URL, click  .</p> <p>To change an existing URL, click  .</p> <p>To remove an existing URL, click  .</p>
User	<p>User/Group Mode</p> <p>The User attribute shows a list of user names. Note that the user list does not necessarily show all users. The list may be limited by the administrator's choice of users, or groups, or by category.</p> <p>Examples:</p> <ul style="list-style-type: none"> • The Administrator configured the user list to show only users of the Administrators group. • User access rights have been configured by category. If the requirement is in category A, the user list shows only users who have access rights for category A. All other users are not in the list. <p>Team Mode</p> <p>The User attribute shows a list of teams. For more information about teams, see chapter "Managing Teams" on page 338.</p> <p>Selecting your own User Account</p> <p>To select your own user account, click Me. If your user name is in the list, your user name will be assigned to the User attribute.</p> <p>Select Users</p> <p>Next to the user attribute, click the  button to open the Find & Select User dialog. For further info, see chapter "Find & Select Dialog" on page 42.</p>

Editable Grid, Grid, and Form Views

The work pages, except for Documents and Traceability, include the ability to toggle between the following views of the requirements they contain: Editable Grid, Grid, and Form. Use the view buttons to select the desired view:

- **Editable Grid:**    "Editable Grid View" on page 30
- **Grid:**    "Grid View" on page 32
- **Form:**    "Form View" on page 32



NOTE If the query includes more than one class, the Form view is not available.

Editable Grid View

MARKETING_REQUIREMENTS (35)			
Category	Rqmt ID	Title	Text
RMDEMO	MRKT_000003	Runs on "standard" home PC	The ePhoto system shall be access from the user's perspective.
RMDEMO	MRKT_000004	Annotate photos with text	The user shall be able to annotate f Annotation should include title, des
RMDEMO	MRKT_000020	Provide photo special effects	The ePhoto system shall allow use

This is a tabular view of requirements with which you can directly edit requirement attributes. It includes the following controls:

-  **Refresh:** This button repopulates the view with fresh data from the database.
-  **Apply changes:** This button saves the changes you have made. Unsaved changes have a red triangle in the upper left.
-  **Undo changes:** This button restores the original contents of the view, removing any unsaved changes you have made.
-  **Create new requirement:** This button adds a blank row to the view, into which you enter the attributes the new requirement that you wish to create. System attributes, such as the requirement ID number, will be populated once you click the **Apply changes** button.
- **Load All:** this button is available only in Quick Search. By default, Dimensions RM does not load all requirements into the editable grid as to avoid long waiting times if a query results in a large number of requirements. Clicking **Load All** loads all requirements of the executed query into the editable grid.
- **Page Controls:** If the view contains multiple pages of content, you can select or enter a specific page to view in the **Page** field. Or you can browse through the pages in sequence with the **First Page**, **Previous Page**, **Next Page**, and **Last Page** controls.
- **Formatting Tool Bar:** If the attribute can accept text formatting, this tool bar appears above the requirement list when you double-click the cell for editing.



Click a column header to sort the requirements by that attribute. To edit an attribute, double-click it; the attribute's cell will then become editable.

Simple Text Attributes: A simple text attribute does not allow text formatting and does not allow line breaks.

Multiline Text Attributes: A multiline text attribute does not allow text formatting, but allows the contained text to be on multiple lines. To start a new line, press **Enter**.

HTML Text Attributes: An HTML text attribute allows text formatting and line breaks. For text formatting, use the **Formatting Tool Bar** as described above.

List Attributes: If the attribute is a selection from a predefined list, you will be presented with a drop-down list to select from. Note that the cell will still show a deleted list value, but the drop-down list will not.

Text Attributes: If the attribute is a text value, a cursor will appear in the cell so you can edit the text as needed. If the attribute can accept text formatting, the Formatting Tool Bar appears in the cell.



TIPS

- To set an attribute to the same value across multiple requirements, select the desired requirements, double-click one instance of the attribute, set it to the desired value, and press the Enter key.
- Except for HTML text attributes, editable cells allow these shortcuts:
 - **Shift+Enter:** Apply changes to cell and navigate to the same cell in the row above.
 - **Ctrl+Enter:** Apply changes to cell and navigate to the same cell in the row below.

To perform other actions on the currently selected requirement or requirements, select the desired action from those listed below **Requirements** on the Actions pane.

To perform an action on the entire set of requirements, expand the selection and then select an action from the highlighted list on the Actions Pane, for example: Add to Collection, Change Class, etc.

Re-Filtering in the Editable Grid

In a filtered list or report, the list may be filtered a second time.

To filter the entries displayed in an editable grid, do the following:

- 1 Move the mouse pointer over the column title you want to filter. The  icon appears.
- 2 Click  and select **Filters**.
- 3 In the sub-menu, select or enter the value for which you wish to filter the results.

Removing Columns from the Editable Grid Temporarily

To remove columns from an editable grid, do the following:

- 1 Move the mouse pointer over the column title you want to filter. The  icon appears.
- 2 Click  and select **Columns**.
- 3 In the sub-menu, clear the boxes next to the column names you want to remove.

Grid View

MARKETING_REQUIREMENTS 35			
Category	Rqmt ID	Title	Text
RMDEMO	MRKT_000003	Runs on "standard" home PC	The ePhoto system shall be accessible to the user from a regular home PC environment running standard Windows software. It is envisaged that this is a software-only application from the user's perspective.
RMDEMO	MRKT_000004	Annotate photos with text	The user shall be able to annotate their photos with textual descriptions. Annotation should include title, description and date of photograph.
RMDEMO	MRKT_000020	Provide photo special effects	The ePhoto system shall allow users to apply various special effects to photos.
RMDEMO	MRKT_000021	Border layouts provided	The ePhoto system shall allow users to display photos in various border layouts.

This is a tabular view of requirements. Click a column header to sort the requirements by that attribute. To open a requirement for editing, double-click it; the requirement opens in the Edit Attributes dialog (see "Editing a Requirement" on page 114).

To perform other actions on the currently selected requirement or requirements, select the desired action from those highlighted below Requirements in the Actions pane.

To perform an action on the entire set of requirements, expand the selection and then select an action from the highlighted list on the Actions Pane, for example: Add to Collection, Change Class, etc.

Form View

◀ ◁ ▷ ▶
Edit 2 of 35 objects

Marketing_Requirements: MRKT_000004

ALL
STANDARD
CUSTOM
SYSTEM
ATTACHMENTS
COMMENTS
LINKS
HISTORY
POLLS
CONTAINERS

Category: RMDEMO

STANDARD ATTRIBUTES

Rqmt ID: MRKT_000004

Title: Annotate photos with text

Text:
The user shall be able to annotate their photos with textual descriptions. Annotation should include title, description and date of photograph.

» CUSTOM ATTRIBUTES

» SYSTEM ATTRIBUTES

» ATTACHMENTS

» COMMENTS

» LINKS

» HISTORY

This view displays the attributes of one requirement at a time.

Attributes are grouped into expandable/collapsible sections by type. You can browse through the requirements in sequence with the **First**, **Previous**, **Next**, and **Last** controls.

To edit the current requirement, click the **Edit** button; the requirement opens in the Edit Attributes dialog (see "Editing a Requirement" on page 114).

To perform other actions on the current requirement, select the desired action from those listed below Requirements in the Actions pane.

Selecting Multiple Requirements

In grid or editable grid view it is generally possible to select more than one requirement. The following selection methods are supported:

- **Ctrl+click** to multi-select
- **Shift+click** to select a block of requirements
- **Ctrl+A** to select all requirements



NOTE

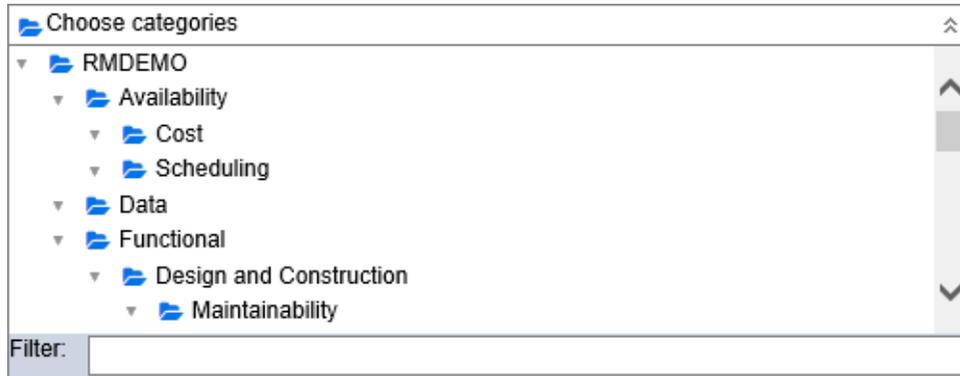
- If the requirements are shown in sections (e.g. in Quick Search when searching over several/all classes), **Ctrl+A** only selects the requirements in the active section.
- When using Quick Search in Split View mode, multi-selection is only allowed for the referenced class.

Common Dialog Controls

See the following subsections for an overview of the control elements common to many RM Browser dialogs:

- ["Category Drop-Down List" on page 34](#)
- ["Attributes to Display List" on page 34](#)
- ["Sorting Order List" on page 35](#)
- ["HTML Text Formatting Toolbar" on page 36](#)
- ["Find & Select Dialog" on page 42](#)
- ["Attribute Constraints Tab" on page 43](#)
- ["Relationship Constraints Tab" on page 49](#)
- ["Display Options Tab" on page 52](#)

Category Drop-Down List



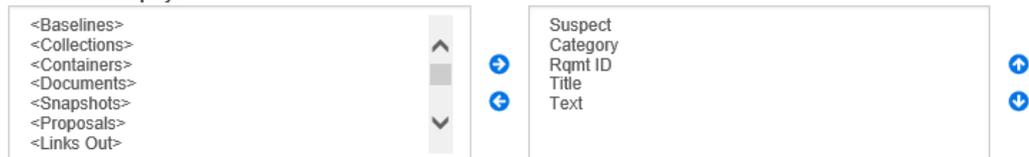
Click the collapsed list to expand it and access the following features:

- **Find:** Enter a search string to dynamically find categories that match it.
- To select multiple categories, press the CTRL key when selecting the categories. Selected categories are highlighted with blue. Multi-select is available only for some operations, such as creating reports.
- To select all sub-categories under a parent category:
 - a Click the desired parent category.
 - b Shift-click the parent category.

Attributes to Display List

The **Attributes to Display** list defines which attributes of a requirement should be shown in a table or list. Different requirement classes can show different attributes.

Attributes to display:



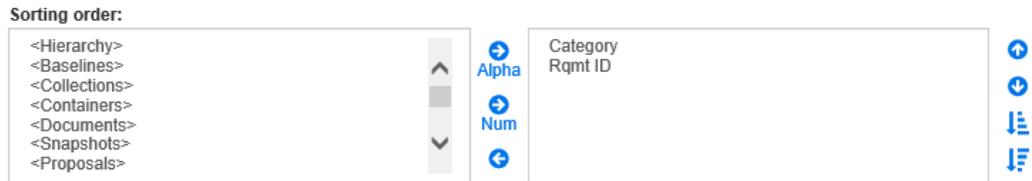
To specify the attributes to display:

- 1 Select the attribute or attributes in the **Attributes to Display** list.
- 2 Click the right arrow button. The attribute or attributes are moved to the display list on the right. If you change your mind, select the attribute or attributes and click the left arrow button to move them back to the **Attributes to Display** list. (Alternatively, you can double-click an attribute to add it to the display list on the right.)
- 3 Use the up and down arrow buttons to the right of the display list to change the display order of the columns.

For a list of special attributes see chapter ["Special Attributes"](#) on page 54.

Sorting Order List

The **Sorting Order** list defines in which order requirements should be sorted. You can specify several attributes for sorting. If you want to order by title, you might want to sort by requirement ID as to ensure an identical order on different executions.



To specify the sort type:

- 1 Select one or more attributes in the **Sorting Order** list.
- 2 Click one of the following buttons:
 - Alphabetic button  for a simple alphabetic sort.
 - Numeric button  for a numeric sort. This type of sort can be used for alphanumeric attributes such as paragraph numbers in outlines. For example, with a numeric sort, the numbers (10, 20, 1, and 2) are sorted as (1, 2, 10, 20) instead of (1, 10, 2, 20).



NOTE Alternatively, you can double-click an attribute to add it as an alphabetic sort to the sort list on the right.

To specify the sort order:

- 1 Select an entry in the sort list.
- 2 To change the sort order, click one of the following buttons:
 - Button  to have the data sorted before other data.
 - Button  to have the data sorted after other data.

For example, select **Paragraph ID** if you want the query results to be sorted in the order presented in the original document, and click the **Numeric** button to sort by paragraph number. Then select **Priority** and click the **Alphabetic** button if you want the requirements with the same paragraph ID sorted by the priority assigned to them.



NOTE If you choose an attribute with the *Date* data type, the results are sorted in date order regardless of whether you chose **Alphabetic** or **Numeric**.

To specify the sort direction:

- 1 Select an entry in the sort list.
- 2 To change the sort direction, click one of the following buttons:
 - Button  to sort ascending (A-Z, 0-9).
 - Button  to sort descending (Z-A, 9-0).

HTML Text Formatting Toolbar

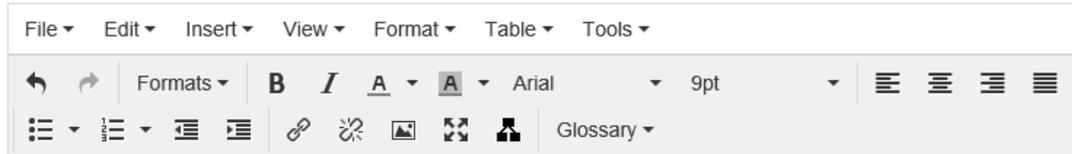


Figure 1-1. Standard HTML Text Formatting toolbar

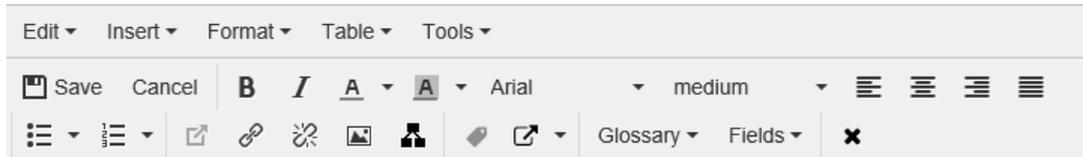
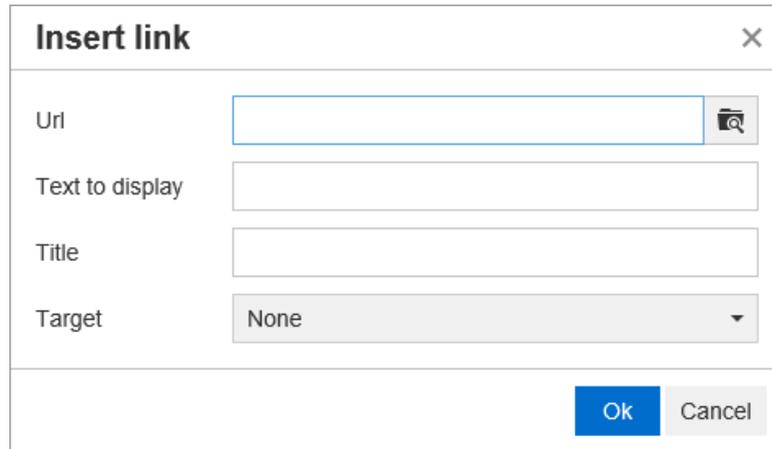


Figure 1-2. HTML Text Formatting toolbar in Entire Document View

If a text attribute can accept HTML formatting (an option set by the administrator for each attribute), this toolbar appears when you click in the attribute's field. It includes the following controls listed in multiple rows:

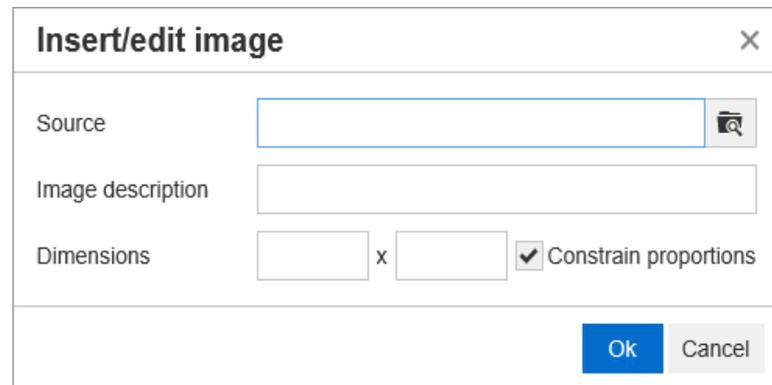
- Undo and Redo
- Select text formats
- Apply bold and italic formatting.
- Select text color and background color.
- Select the font family and size.
- Align the text.
- Apply list formatting.
- Apply indentation formatting.
- **Open link:** Click to open a selected link. Note that this button is only available in entire document view.

-  **Insert/edit link:** To create a link or edit an existing link, select the text and click the **Insert/edit link** button. The **Insert link** dialog appears. Complete the fields as needed, and click **OK**.



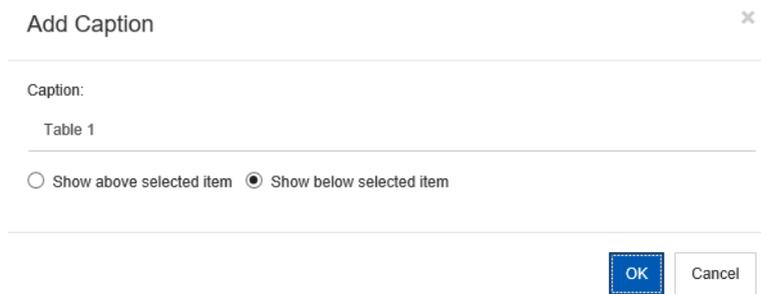

TIP If you want to upload a file or attachment, use the **Insert/edit link** function.

-  **Remove link:** To remove an existing link, select the link and click the **Remove link** button.
-  **Insert/edit image:** To insert a graphic into the attribute, place the cursor where you want to insert the image. To edit the HTML parameters of an existing image, select the image element. Then click the **Insert/edit image** button. The **Insert/edit image** dialog opens. Complete the fields as needed and click **OK**.

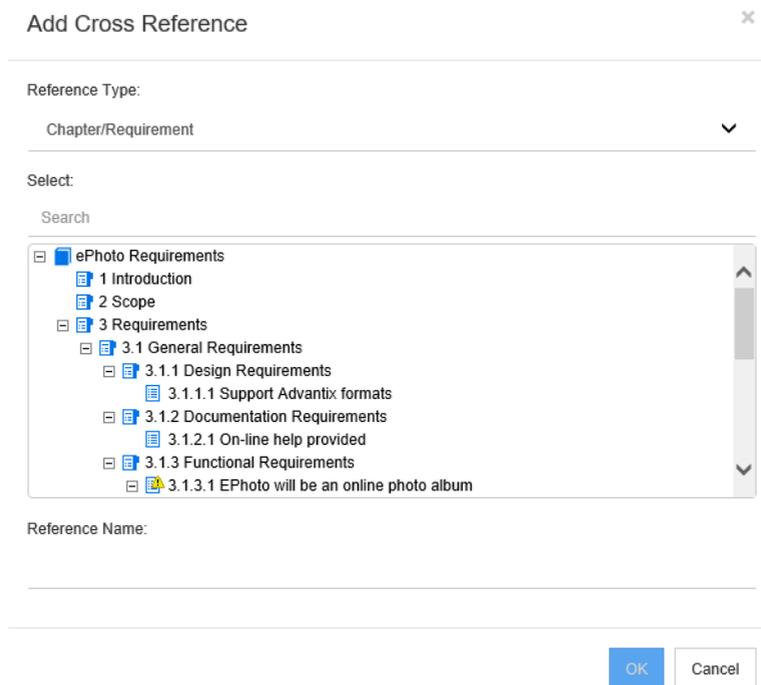


-  **Toggle fullscreen mode:** Click to toggle between a dialog view and a full screen view of the text attribute you are editing.
-  **Open graph editor:** Opens the graph editor. For further information about the graph editor, see chapter "Graph Editor" on page 60.

-  **Add caption:** To add or rename a caption, select an image or a table and click the **Add caption** button. This opens the **Add Caption** dialog. Complete the fields as needed and click **OK**.



-  **Cross Reference:** Clicking the triangle next to the button opens a menu with the following functions:
 - Insert:** Selecting **Insert** or clicking the **Cross Reference** button opens the **Add Cross Reference** dialog, which allows to insert a reference to a requirement, chapter, or an image or table with caption. Select/fill the fields as needed and click **OK**.



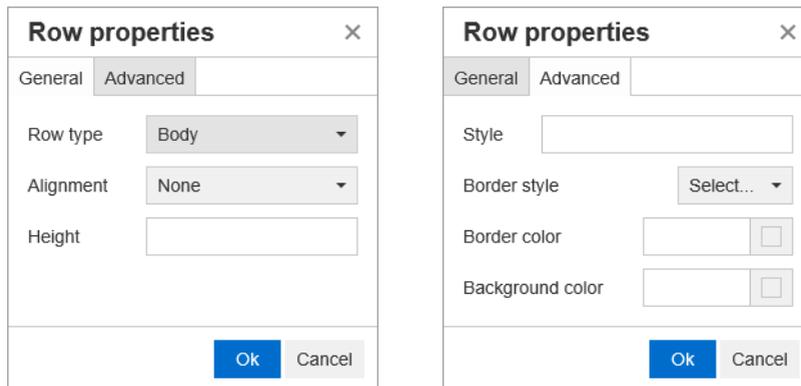
- Reference Type:**
 - Chapter/Requirement:** The **Select** box shows all chapters and requirements of the current document.
 - Figure:** The **Select** box shows all images with a caption.
 - Table:** The **Select** box shows all tables with a caption.
- Select:** Depending on your choice of the **Reference Type** box, the **Select** box shows chapters, requirements, images, or tables.
- Search:** For chapters and requirements, you can filter the entries in the **Select** box by typing parts of the text to search for.

- **Caption:** Creates an extra row on top of the table in which you can enter a caption (heading) for the table. Note that this is not related to the function **Add Caption** (🔗).
- **Alignment:** Allows you to select how the table should be aligned.
 - **None:** Uses the default alignment, usually left.
 - **Left:** Aligns the table to the left border of the window.
 - **Center:** Horizontally centers the table.
 - **Right:** Aligns the table to the right border of the window.
- **Style:** This attribute allows to define CSS styles. Usually you do not need to edit this value.
- **Border color:** Defines the color of the table border. The value can be any HTML known color (e.g. red, green, blue) or color value (#FF0000, #00FF00, #0000FF). Not all browser may support this feature. Clicking the grey box opens the **Color** dialog which allows easy selection of the desired color.
- **Background color:** Defines the color of all table cells. The value can be any HTML known color (e.g. red, green, blue) or color value (#FF0000, #00FF00, #0000FF). Clicking the grey box opens the **Color** dialog which allows easy selection of the desired color.

Row Properties

To open the row properties, execute these steps:

- 1 Select a row in the table.
- 2 In the **Table** menu, point to **Row**, then select **Row properties**. This opens the **Row Properties** dialog.



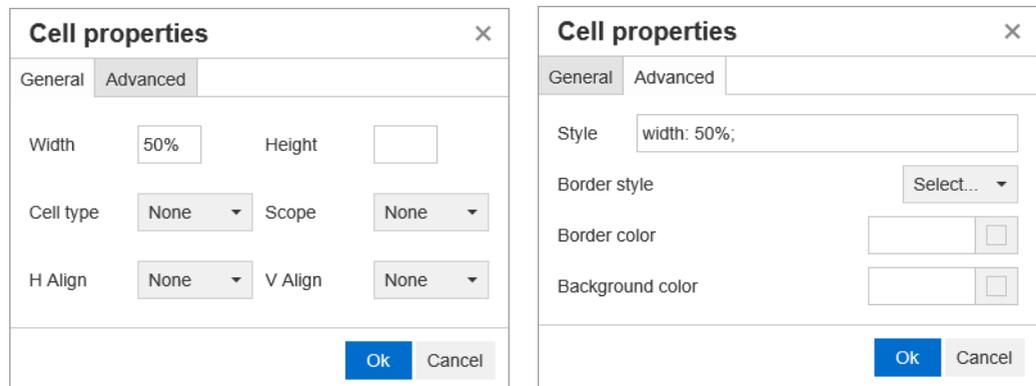
- **Row type:** Defines the type of a table row. This setting can be ignored.
 - **Header:** The row is a header row (in HTML this is a row within a THEAD tag). Selecting the **Header** type repeats the header on each new page in published Word documents.
 - **Body:** The row is a regular body row. This is the default.
 - **Footer:** The row is a footer row (in HTML this is a row within a TFOOT tag).
- **Alignment:** Aligns the content of all cells in the row.
 - **None:** Uses the default alignment, usually left.

- **Left:** Aligns all content to the left.
- **Center:** Centers all content.
- **Right:** Aligns all content to the right.
- **Height:** Specifies the height of the row. The height can be specified in % (e.g. 50%) or pixels (e.g. 75).
- **Style:** This attribute allows to define CSS styles. Usually you do not need to edit this value.
- **Border color:** Defines the color of the border of all cells in the selected row. The value can be any HTML known color (e.g. red, green, blue) or color value (#FF0000, #00FF00, #0000FF). Not all browser may support this feature. Clicking the grey box opens the **Color** dialog which allows easy selection of the desired color.
- **Background color:** Defines the color of all cells in the selected row. The value can be any HTML known color (e.g. red, green, blue) or color value (#FF0000, #00FF00, #0000FF). Clicking the grey box opens the **Color** dialog which allows easy selection of the desired color.

Cell Properties

To open the cell properties, execute these steps:

- 1 Select one or several cells in the table.
- 2 In the **Table** menu, point to **Cell**, then select **Cell properties**. This opens the **Row Properties** dialog.



- **Width:** Specifies the width of the selected cells. The width can be specified in % (e.g. 50%) or pixels (e.g. 75).
- **Height:** Specifies the height of the selected cells. The height can be specified in % (e.g. 50%) or pixels (e.g. 75).
- **Cell type:** Specifies the type of the selected cells.
 - **Cell:** This is a regular cell.
 - **Header cell:** This is a header cell, which may apply additional formatting.
- **Scope:** Specifies the scope of the selected cells. Usually you do not need to change this setting.
 - **None:** There is no scope for this cell. This is the default.

- **Row:** The cell is a header for a row.
- **Column:** The cell is a header for a column.
- **Row group:** The cell is a header for a group of rows.
- **Column group:** The cell is a header for a group of columns.
- **H Align:** Horizontally aligns the content of the selected cells.
 - **None:** Uses the default alignment, usually left.
 - **Left:** Aligns all content to the left.
 - **Center:** Centers all content.
 - **Right:** Aligns all content to the right.
- **V Align:** Vertically aligns the content of the selected cells.
 - **None:** Uses the default alignment, usually middle.
 - **Top:** Aligns all content to the top of the cell.
 - **Middle:** Vertically centers the content within the cell.
 - **Bottom:** Aligns all content to the bottom of the cell.
- **Style:** This attribute allows to define CSS styles. Usually you do not need to edit this value.
- **Border color:** Defines the color of the border of the selected cells. The value can be any HTML known color (e.g. red, green, blue) or color value (#FF0000, #00FF00, #0000FF). Not all browser may support this feature. Clicking the grey box opens the **Color** dialog which allows easy selection of the desired color.
- **Background color:** Defines the color of the selected cell. The value can be any HTML known color (e.g. red, green, blue) or color value (#FF0000, #00FF00, #0000FF). Clicking the grey box opens the **Color** dialog which allows easy selection of the desired color.

Inserting Page Breaks

When publishing a document, you may have page breaks within a chapter (or requirement), e.g. before a long table.

To insert a page break, select the **Insert** menu, then select  **Page break**.

A page break is visualized by .

Find & Select Dialog

For list attributes and user attributes, the **Find & Select** dialog is available. This dialog allows to filter the list values or user values and thus allows quicker and easier selection. While the dialog for list attribute only shows the list attribute values, the dialog for user attributes displays user names along with their full names. The screenshot and steps below describe the dialog for user attributes.

Find&Select User

User ID	First Name	Last Name	Team
Filter by User ID	Filter by First Name	Filter by Last Name	Filter by Team
ADMINISTRATION	Samuel	Gray	
BUSINESS_ANALYST	Eric T.	O'Brien	Others
DEV	Jordan	Cooper	DB, General
DEVELOPMENT	Susan	Smith	General
DEV_MANAGER	Erica	Morgan	DB, General
ENGINEERING	Daniel	Hughes	General, GUI
EPHOTO	Ryan	Foebes	GUI
EPHOTO_INFO	Carter	Barton	
JOE	Joseph	Wilson	
MANAGEMENT	Alexis	Orlitzky	
MARKETING	Luck	McMatton	Others
PRODUCT_MANAGER	Henry	Miller	General
PROJECT_MANAGER	Mark	Heber	General
QA	Julia	Combs	Others
RTMADMIN	Ethan	Hyde	
SALES	Steve	Martin	Others

OK Cancel

You can easily find a user by filtering the list using these boxes:

- **User ID:** Filter the list by entering part of the user ID.
- **First Name:** Filter the list by entering part of the first name.
- **Last Name:** Filter the list by entering part of the last name.
- **Team:** Filter the list by entering part of the team name. Note that this column is only available if Teams have been enabled by the administrator.

When the list shows the desired value, select it and click **OK**.



NOTE If a field allows multi-selection, the **Find & Select** dialog shows an additional column with check boxes. To select several entries, select the check boxes for the desired values.

Attribute Constraints Tab

This tab uses relationship criteria to determine which requirements are included.

To complete the Attribute Constraints tab:

- 1 Click the **Attribute Constraints** tab.
- 2 If you want to change the category or categories that are searched, select them in the **Category** list.
- 3 With Traceability reports, select an entry from the **Choose attribute constraints for class** box. You can choose the top class or any sub-class you selected on the **Related Classes to Display** tab.
- 4 For each attribute in one of the following sections, specify a value.

Note the following:

- If you leave a field blank, any value for that attribute is retrieved in the query.
- If you select multiple values for attributes that are displayed in a list, any of the selected values are matched.

- You can use wildcards in the attributes constraints sections to query for a keyword. For example, if you want to find the requirements that have the word "system" in the title, type ***system*** in the **Title** field in the **Standard Attributes** section.
- 5 To enter values into the attribute boxes of more than one class, repeat steps 3 and 4.
 - 6 Select the **Case sensitive search** check box if you want the search results to exactly match the capitalization of the attribute values.

Attribute Constraints Tab Controls

This section describes the controls associated with attributes on the **Attributes Constraints** tab.

Categories

Category constraints describe categories to use when retrieving requirements. You can choose whether the user is to enter the category or categories at runtime (that is, at script execution time) or whether the category or categories are stored as part of the query. The category and runtime choices apply to all the classes in the traceability report.

Perform one of the following steps:

- Click the down arrow ▾ to the right of the **Categories** list, and select **Enter now**. Select one or more categories from the **Categories** list, click the down arrow to the left of the **Categories** list, and select **in** or **not in** to specify whether the categories should be included in the query.
- Click the down arrow to the right of the **Categories** list, and select **Enter at runtime**.

- Click the down arrow to the left of the **Categories** list, and select **in** or **not in** to specify whether the category or categories should be included in the query.



NOTES

- The **null** and **not null** options are not used for categories.
- To select all categories between two categories, select the top category, follow these steps:
 - Press SHIFT and keep it pressed.
 - Click the selected category
 - Click the last category
 - Release SHIFT.
- To select more than one category, press CTRL and click the categories.
- To select a category and its subcategories, hold down SHIFT and click a category. Pressing CTRL+SHIFT and clicking a category adds the category and its subcategories without changing the current selection.
- To deselect a category, press CTRL and click the selected category. Because the CTRL key toggles the selection of the clicked category, the other categories are not affected. Clicking a category without pressing CTRL removes all other selections.
- To search for a category, type one or more letters from the category name in the **Find** box.
- If no categories are selected, **Choose categories** is displayed in the list box, and all categories are included in the query.
- If more than one category is selected, **(n selected)** is displayed in the list box.
- If only one category is selected, **Category Name** is displayed in the list box.



TIP To return the category list to an empty selection, hold down CTRL and then click each selected category until no categories are selected. Then, the categories list displays **Choose Categories** again. Alternatively, you can click any category, hold down CTRL, and click the same category again.

Group Attributes:

Normally, all attributes have to match for making a query. As group attributes behave like a table with one or several values per row, Quick Search allows to define how the values in should be considered for the search. You can select one of the following:

- in (AND)
- in (OR)
- not in (AND)
- not in (OR)
- null

- not null



NOTE When specifying only a single row in your query:

- **in (AND)** and **in (OR)** return the same results.
- **not in (AND)** and **not in (OR)** return the same results.

The following examples use the **Tests** class of the **RMDEMO** instance.

In (AND)

When choosing the **in (AND)** operator, a requirement is added to the result list if all values of the group attribute match all queried values.

Example:

- 1 Select the class **Tests**.
- 2 Add the attribute **Operating System**.
- 3 In the group attribute boxes, select **Desktop, Windows, XP**.
- 4 Click  .
- 5 In the group attribute boxes, select **Desktop, Windows, Vista**.
- 6 Click  .
- 7 In the group attribute boxes, select **Desktop, Windows, 7**.
- 8 Ensure that the operator selection shows **in (AND)**.
- 9 Run the report.

The result list contains requirements with the **Operating System** attribute having the combination of the following values: **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7**.

In (OR)

When choosing the **in (OR)** operator, a requirement is added to the result list if any of the values of the group attribute matches at least one of the queried values.

Example:

- 1 Select the class **Tests**.
- 2 Add the attribute **Operating System**.
- 3 In the group attribute boxes, select **Desktop, Windows, XP**.
- 4 Click  .
- 5 In the group attribute boxes, select **Desktop, Windows, Vista**.
- 6 Click  .
- 7 In the group attribute boxes, select **Desktop, Windows, 7**.

- 8 Ensure that the operator selection shows **in (OR)**.
- 9 Run the report.

The result list contains requirements that contain either **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7** (among other values) in its **Operating System** attribute.

Not in (AND)

When choosing the **not in (AND)** operator, a requirement is added to the result list if the values of the group attribute do not match all of the queried values.

Example:

- 1 Select the class **Tests**.
- 2 Add the attribute **Operating System**.
- 3 In the group attribute boxes, select **Desktop, Windows, XP**.
- 4 Click  .
- 5 In the group attribute boxes, select **Desktop, Windows, Vista**.
- 6 Click  .
- 7 In the group attribute boxes, select **Desktop, Windows, 7**.
- 8 Ensure that the operator selection shows **not in (AND)**.
- 9 Run the report.

The result list contains requirements with the **Operating System** attribute **not** having the combination of the following values: **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7**.

Not in (OR)

When choosing the **not in (OR)** operator, a requirement is added to the result list if the values of the group attribute do not match any of the queried values.

Example:

- 1 Select the class **Tests**.
- 2 Add the attribute **Operating System**.
- 3 In the group attribute boxes, select **Desktop, Windows, XP**.
- 4 Click  .
- 5 In the group attribute boxes, select **Desktop, Windows, Vista**.
- 6 Click  .
- 7 In the group attribute boxes, select **Desktop, Windows, 7**.
- 8 Ensure that the operator selection shows **not in (OR)**.

9 Run the report.

The result list contains requirements that contain neither **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7** in its **Operating System** attribute.

Null

When choosing the **null** operator, a requirement is added to the result list if no group attribute value has been specified.

Not Null

When choosing the **not null** operator, a requirement is added to the result list if any group attribute value has been specified.

Operators

If you hover over the down arrow ▼ to the left of the attribute label, a list of operators opens. The list includes only the operators that are appropriate for the attribute type. The following table describes each operator.

Operator	Description
=	The attribute equals the value you specify. The wildcard characters *, %, and _ are supported. * or %: A wildcard character for any set of characters. _: A wildcard character for a single character.
not =	The attribute does not equal the value you specify. The wildcard characters *, %, and _ are supported. * or %: A wildcard character for any set of characters. _: A wildcard character for a single character.
<	The attribute is less than the value you specify.
>	The attribute is greater than the value you specify.
<=	The attribute is less than or equal to the value you specify.
>=	The attribute is greater than or equal to the value you specify.
between	The attribute is between the two values you specify. When you select the "between" operator, another field appears that allows you to type the second value.
not between	The attribute is not between the two values you specify. When you select the "not between" operator, another field appears that allows you to type the second value.
null	The attribute has not been set (not initialized).
not null	The value has been set (initialized).
in	The attribute equals one of the values you specify.
not in	The attribute does not equal one of the values you specify.

Runtime Choice

If you hover over the down arrow ▼ to the right of the attribute label, a list opens that lets you choose whether the attribute value is to be entered at runtime (that is, at script execution time) or stored as part of the query. The following table describes the choices in the list.

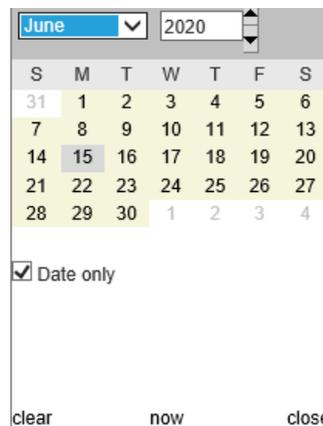
Choice	Description
Enter now	The attribute value is stored as part of the query.
Enter at runtime	The user is prompted to enter the attribute value when the query runs. When applying runtime options, they may be saved by checking ' Remember these Parameters '.
Current Date	This option is only available for date attributes. When running the report, the date field is compared to the date (and time) of the date attribute for which this option is selected.

Date and Time Control

The date and time shown in the date and time control matches the format specified in the attribute definition.

To use the date and time control:

- 1 Click the calendar icon .



- 2 To include time in the selection: uncheck 'Date Only'
- 3 Click **Today**, resetting the time if necessary, and click OK
- 4 Or select a month, year, day, (and time) and then click OK.

Relationship Constraints Tab

This tab uses relationship criteria to determine which requirements are included.



NOTE The constraints you select on the **Constraints** tab are combined using an AND operation. That is, the requirement must meet all the constraints that are specified before it is included in the report.

To complete the Relationship Constraints tab:

- 1 Click the **Relationship Constraints** tab.

- 2 *Traceability Report only*: Relationships constraints may be applied individually, by class. To limit criteria to a specific class, uncheck 'Apply for all Classes' and choose the relevant class from the Class drop-down.
- 3 Collection constraints describe collection memberships to be applied when retrieving requirements. Select collections from the **Collections** list, and select from the constraint options to specify whether they should be included in the query. To select multiple collections in the list, hold down the Control key while you select the collections. To select a range of collections, select the first collection, press the Shift key, and then select the last collection. You can find collections by scrolling in the list, or by typing a substring of the collection name in the **Find collection** box.

The constraint options include:

- **In any selected collection(s)** to include requirements in any of the collections you have selected
 - **Not in any selected collection(s)** to exclude requirements from any of the collections you selected
 - **In all selected collection(s)** to include requirements that are in each of the collections you selected
 - **Not in all selected collection(s)** to exclude requirements that are not in each of the collections you selected
 - **In any collection(s)** to include requirements in any - even just one - of the collections you selected
 - **Not in any collection(s)** to exclude requirements that are in any - even just one - of the collections you selected
- 4 Baseline constraints describe baselined collection memberships to use when retrieving requirements. Select baselines from the **Baselines** list, and select **In** or **Not In** to specify whether they should be included in the query. You can include more than one baseline constraint in the query. You can find baselines by scrolling in the list, or by typing a substring of the baseline name in the **Find baseline** box.

To select multiple baselines in the list, hold down the Control key while you select the baselines. To select a range of baselines, select the first baseline, press the Shift key, and then select the last baseline.

The constraint options include:

- **In any selected baseline(s)** to include requirements in any of the baselines you have selected
 - **Not in any selected baseline(s)** to exclude requirements from any of the baselines you selected
 - **In any baseline(s)** to include requirements in any - even just one - of the baselines you selected
 - **Not in any baseline(s)** to exclude requirements that are in any - even just one - of the baselines you selected
- 5 Document constraints describe documents to use when retrieving requirements. Select documents from the **Documents** list, and select **In** or **Not In** to specify whether they should be included in the query.

You can find documents by scrolling in the list, or by typing a substring of the document name in the **Find document** box.

To select multiple documents in the list, hold down the Control key while you select the documents. To select a range of documents, select the first document, press the Shift key, and then select the last document.

The constraint options include:

- **In any selected document(s)** to include requirements in any of the documents you have selected
- **Not in any selected document(s)** to exclude requirements from any of the documents you selected
- **In any document(s)** to include requirements in any - even just one - of the documents you selected
- **Not in any document(s)** to exclude requirements that are in any - even just one - of the documents you selected

- 6** A snapshot is a version of a document at a specific point in time. Snapshot constraints describe snapshots to use when retrieving requirements. Select snapshots from the **Snapshots** list, and select **In** or **Not In** to specify whether they should be included in the query. You can include more than one snapshot constraint in the query. You can find snapshots by scrolling in the list, or by typing a substring of the snapshot name in the **Find snapshot** box.

To select multiple snapshots in the list, hold down the Control key while you select the snapshots. To select a range of snapshots, select the first snapshot, press the Shift key, and then select the last snapshot.

The constraint options include:

- **In any selected snapshot(s)** to include requirements in any of the snapshots you have selected
- **Not in any selected snapshot(s)** to exclude requirements from any of the snapshots you selected
- **In any snapshot(s)** to include requirements in any - even just one - of the snapshots you selected
- **Not in any snapshot(s)** to exclude requirements that are in any - even just one - of the snapshots you selected

- 7** *Class, Graphical and Traceability Report only:* Relationships connect a primary and a secondary class. Select relationships from the **Relationships** list, and select **In** or **Not In** to specify whether they should be included in the query. You can include only one relationship constraint in a query.

You can find relationships by scrolling in the list, or by typing a substring of the relationship name in the **Find relationship** box.



NOTE

- **<Source>** and **<Immediate>** are special relationships that are used to locate versions of requirements. The **<Source>** relationship refers to the original requirement in a chain of versions. The **<Immediate>** relationship refers to the immediate predecessor or successor of a requirement.
- Relationship constraints are not present on the **Relationship Constraints** tab on the **New Traceability Report** dialog box.
- If you select a relationship, and then type the first few letters of another relationship, the first relationship is no longer selected.

Display Options Tab

This tab determines what fields are displayed and in what order. Slightly different versions of this tab appear in a number of dialogs.



NOTE

- The attributes you select to display in the **Display Options** tab in the **New Traceability Report** dialog box are only shown in Requirements View after you run a traceability report.
- There are two meta attributes that can be displayed in a traceability report or Query by Class or Query by Relationship:
 - **<DEFAULT_TITLE>** is in a column named **Title**. It gets the data for the attribute marked as the Title attribute in Class Definition. For more information about the Title attribute, see the *Dimensions RM Administrator's Guide*.
 - **CM Associations** is in a column named **CM Associations**. In the traceability report or query, if a requirement is in a collection that is linked to a Dimensions CM project, that collection name is displayed in the column.

To complete the Display Options tab:

- 1 Click the **Display Options** tab.

Class Report: Marketing_Requirements

GENERAL ATTRIBUTE CONSTRAINTS RELATIONSHIP CONSTRAINTS **DISPLAY OPTIONS**

ATTRIBUTES TO DISPLAY

<Baselines>
<Collections>
<Containers>
<Documents>
<Snapshots>
<Proposals>
<Links Out>
<Links In>
<Links Out Details>

Rqmt ID
Title

Add row count

SORTING ORDER

<Hierarchy>
<Baselines>
<Collections>
<Containers>
<Documents>
<Snapshots>
<Proposals>
<Links Out>
<Links In>

Rqmt ID

Alpha
Num

ATTRIBUTES TO DISPLAY IN TOOLTIP

Delivery Phase
File Attachment
Initial Created By
Initial Time Created
Object Version ID
Priority
Reason for change
Requirement Link
Rqmt ID

Current Status
Object ID
Time Modified
Modified By

Remember these options

View Script Preview Run Cancel

Traceability Report: Marketing_Requirements

GENERAL RELATED CLASSES TO DISPLAY ATTRIBUTE CONSTRAINTS RELATIONSHIP CONSTRAINTS **DISPLAY OPTIONS**

Available Classes:

Marketing_Requirements
Product_Requirements
Component_Requirements
Tests
Defects
[Show more...](#)

Attributes to display:

<Baselines>
<Collections>
<Containers>
<Documents>
<Snapshots>
<Proposals>
<Links Out>
<Links In>
<Links Out Details>

Rqmt ID
<DEFAULT_TITLE>

Add row count

Sorting order:

<Hierarchy>
<Baselines>
<Collections>
<Containers>
<Documents>
<Snapshots>
<Proposals>
<Links Out>
<Links In>

Rqmt ID

Alpha
Num

Attributes to display in tooltip:

<Baselines>
<Collections>
<Containers>
<Documents>
<Snapshots>
<Proposals>
<Links Out>
<Links In>
<Links Out Details>

Manual order

View Script Preview Run Cancel



NOTE The tabs shown in the preceding illustrations are from the **Query by Class** and **New Traceability Report** dialog boxes. The appearance of **Display Options** tabs can differ.

- 2 *New Traceability Report only:* Select a class from the **Choose a class** list. All classes are displayed on this tab, but the only attributes that are saved are those that are in classes that are displayed in the traceability report. You can sort attributes for each class.
- 3 To specify the columns to display and their order, see chapter "Sorting Order List" on page 35.

- 4 *Query by Class, Query by Relationship, and New Traceability Report only*: Select the **Add row count** check box to display the number of rows at the bottom of the query results.
- 5 To specify the sort type and order, see chapter "[Sorting Order List](#)" on page 35.
- 6 Select the **Remember these options** check box to remember the settings on this tab the next time this dialog box is invoked. The settings are remembered if the same user invokes the dialog box from the same RM instance and queries the same class or relationship. They are remembered in the **Query Class, Query Relationship, Link, Organize by Collections, and Add to Chapter** dialog boxes.



NOTE All of the dialog boxes cited above share the settings. For example, if you save the settings for the Marketing Requirements class in the **Query Class** dialog box, you will see the same settings for the Marketing Requirements class in the **Link** dialog box.

Special Attributes

The lists contain some special attribute names which are enclosed by <>. These attributes are not class attributes, but contain collected or calculated values. The following list shows these attributes:

Attribute Name	Script Name	Description
<Baselines>	RTM_BASELINES	The names of the baselines referencing the requirement.
<Collections>	RTM_COLLECTIONS	The names of the collections referencing the requirement.
<Comments>	RTM_COMMENTS	The comments related to the requirement.
<Containers>	RTM_KEYWORD	The names of the containers referencing the requirement.
<Documents>	RTM_DOCUMENTS	The names of the documents referencing the requirement.
<Links In Details>	RTM_LINKS_TO_DETAILS	The PUIDs of requirements linked from other requirements to the requirement. In result lists (i.e. Quick Search, reports or documents in Grid/Editable Grid Requirement Layout mode), you can open a linked requirement for editing by clicking the PUID.
<Links Out Details>	RTM_LINKS_FROM_DETAILS	The PUIDs of requirements this requirement links to. In result lists (i.e. Quick Search, reports or documents in Grid/Editable Grid Requirement Layout mode), you can open a linked requirement for editing by clicking the PUID. Note that by default, when using <Linked Test Cases>, test cases are no longer in the <Links Out Details> result list.

Attribute Name	Script Name	Description
<Linked Test Cases>	RTM_LINKED_TESTCASES	The PUIDs of test cases (see chapter " Test Case Management " on page 305) this requirement links to. In result lists (i.e. Quick Search, reports or documents in Grid/Editable Grid Requirement Layout mode), you can open a list of linked requirements by clicking the PUID, which opens that requirement for editing. Note that by default, when using <Linked Test Cases>, test cases are no longer in the <Links Out Details> result list.
<Links In>	RTM_LINKS_TO	The number of links from other requirements to the requirement. In result lists (i.e. Quick Search, reports or documents in Grid/Editable Grid Requirement Layout mode), you can open a list of linked requirements by clicking the arrow or number in the Links In column of a requirement in the result list. Clicking a requirement in the list opens that requirement for editing.
<Links Out>	RTM_LINKS_FROM	The number of links from the requirement to other requirements, which includes the number of linked test cases. In in result lists (i.e. Quick Search, reports or documents in Grid/Editable Grid Requirement Layout mode), you can open a list of linked requirements by clicking the arrow or number in the Links Out column of a requirement in the result list. Clicking a requirement in the list opens that requirement for editing.
<Notification>	NOTIFICATION	Shows if e-mail notification for a project has been configured. Possible values: <ul style="list-style-type: none"> ■ Yes: Enabled ■ No: Disabled If no value has been specified, e-mail notification for the project has not been configured.
<Proposals>	RTM_PROPOSALS	The number of proposals related to the requirement in status Proposed . Accepted or rejected proposals are not counted. Clicking the number opens the Accept Changes dialog which allows you to accept or reject the proposal. For details, see chapter " Reviewing a Change Request/Proposed Requirement " on page 120.
<Related Container>	RTM_RELATED_CONTAINER	Lists the containers associated with the related workflow item; included only with workflow. Opening a listed item will display the container type and detail.

Attribute Name	Script Name	Description
<Snapshots>	RTM_SNAPSHOTS	The names of the document snapshots referencing the requirement.
<Thread>	RTM_COMMENTS_TH READ	Only available for Sorting Order with comments. If comments are ordered by Thread, a reply follows the comment it replies to.

Script names are used when writing or modifying report scripts or accessing Dimensions RM Web Services. For further information about scripts see chapter "[Script Syntax](#)" on page 381. For further information about Dimensions RM Web Services refer to the *Web Service and Rest Service Reference* guide.

Accessing Dimensions RM

The login process that you experience will depend upon which login source has been implemented by your administrator:

- RM or LDAP
- Single Sign On (SSO)
- Single Sign On with SmartCard (CAC)
- Microsoft Azure



NOTE

- Cookies must be enabled to log in to RM Browser.
- After a period of inactivity, an RM Browser session times out, and you are logged out of RM Browser. A login dialog opens so you can log in again. By default, the session timeout is 30 minutes. Your administrator can modify this value. It is recommended that you log out of RM Browser when you finish your work in it.

RM or LDAP Login

To log in to RM Browser:

- 1 Navigate to the URL provided by your administrator. The User Log in page opens.
- 2 Enter your user name and password.
- 3 Select the database in which you will be working; the first time you log in, the full list is included, after that the last database accessed is selected by default.
- 4 Select the RM instance in which you will be working. Only the RM instances to which you have access are displayed.
- 5 Click the **Login** button or press the **Enter** key.

Single Sign On Login

To log in via SSO:

- 1 Navigate to the URL provided by your administrator. The SSO sign in page opens.
- 2 Enter your user name and password.
- 3 Click the **Log In** button. The User Log in page opens.
- 4 Select the database in which you will be working; the first time you log in, the full list is included, after that the last database accessed is selected by default.
- 5 Select the instance in which you will be working. Only the instances to which you have access are displayed.
- 6 Click the **Login** button or press the Enter key.

Single Sign On with SmartCard Login

To log in via SmartCard:

- 1 Navigate to the URL provided by your administrator. The SSO sign in page opens.
- 2 Ensure that your SmartCard is inserted into a reader, and click the **SmartCard Login** button.
- 3 Select a valid certificate from your SmartCard (CAC) and enter the appropriate PIN.
- 4 Click the **OK** button. The User Log in page opens with the **Username** field populated and read-only.
- 5 Select the database in which you will be working; the first time you log in, the full list is included, after that the last database accessed is selected by default.
- 6 Select the instance in which you will be working. Only the instances to which you have access are displayed.
- 7 Click the **Continue** button or press the Enter key.

Azure Login

If your administrator configured login through Microsoft Azure, you may have to log in to Dimensions RM using Azure login credentials.

To log in via Azure:

- 1 Navigate to the URL provided by your administrator. Depending on the Dimensions RM environment configuration, either the Dimensions RM User Log in page, or the Azure login page opens.
- 2 If the Dimensions RM User Log in page opens, click the **Microsoft Azure Authentication** link, which is located under the **Login** button.
- 3 Enter your Azure user name and click **Next**.
- 4 Enter your password and click **Sign in**.

- 5 Select the database in which you will be working; the first time you log in, the full list is included, after that the last database accessed is selected by default.
- 6 Select the RM instance in which you will be working. Only the RM instances to which you have access are displayed.
- 7 Click the **Login** button or press the **Enter** key.

Logging Out

To log out of RM Browser:

Select **Log Out** from the **Welcome** menu. For more information on the Welcome menu, see chapter "[Welcome Menu](#)" on page 21



NOTE It is recommended that you log out of RM Browser when you finish working in it.

Switching to Another RM Instance

To switch to another RM instance within the same database, click on the ▼ button next to the current RM instance name:

RMDEMO ▼ >  RMDEMO

For switching to an RM instance in a different database, you must log out and then log into the desired database. See "[Accessing Dimensions RM](#)" on page 56.

Changing Your Password

It is best security practice for users to change their passwords from time to time. The RM administrator can enforce this practice by setting the number of days a password lasts before it expires. Additionally, the RM administrator can enforce password quality requirements, such as the minimum length; minimum number of characters that must be different between the new and the old password; the minimum number of letters, numerals, and special characters; and the number of old passwords that are stored to ensure that a password is not reused too soon. Using the procedure below, you can view the password rules that are in effect for the RM database.



NOTE The RM password rules do not affect logins via LDAP, as these would be managed in LDAP.

Before your current password is due to expire, you receive a warning dialog box that gives you the opportunity to change your password.

To change your password:

- 1 Click the **Welcome, UserID** link in the upper right of the screen. The Change Password dialog box appears.

- 2 To view the password rules in effect for this RM database, click the **Password Rules** link.

**NOTE**

- The rules apply to all RM instances in the database.
- The RM administrator can exempt individual users from the rules. However, exempt users will still see the rules if they click the Password Rules link.

- 3 Type your existing password in the **Old Password** field.
- 4 Type the new password in the **New Password** field.
- 5 Type the new password again in the **Confirm Password** field.
- 6 Click **OK**.

Getting Help

You can get help specific to the page or dialog box you are currently using, or use the TOC and Search features of the full help system to look up information.

To get help for the page or dialog box you are on:

- **Views:** (e.g. Home View, Document View, Quick Search), select **Help** from the **Welcome** menu. This opens the help topic for that view.
- **Dialogs:** Click the **Help** link at the top right of the dialog. This opens the help topic for that dialog.

Enabling and Disabling E-Mail Notifications

The e-mail notifications for a user account or a user group(s) can be enabled or disabled.

To enable e-mail notifications, do the following:

- 1 Select **Notifications** from the **Welcome** menu. This opens the **Notifications** dialog.
- 2 In the **Inactive Notifications** list, expand the desired class by clicking  next to the class name.
- 3 Select the desired e-mail notification rule.
- 4 Click .
- 5 Click **Save**.
- 6 Click **Cancel** to close the dialog.

To disable e-mail notifications, do the following:

- 1 Select **Notifications** from the **Welcome** menu. This opens the **Notifications** dialog.

- 2 In the **Active Notifications** list, expand the desired class by clicking  next to the class name.
- 3 Select the desired e-mail notification rule.
- 4 Click .
- 5 Click **Save**.
- 6 Click **Cancel** to close the dialog.

Glossary

The glossary in Dimensions RM is only active if your administrator created the Glossary class as described in the *Administrator's Guide*.

With the glossary you can define your own entries. On HTML attribute and chapter texts, you can scan for glossary entries. For each matching word, a tooltip provides the explanation of that word. To recognize a match, the word is shown in white text and cyan background color.

The glossary is available

- as a tab on the Home View, see chapter ["Glossary Tab" on page 241](#);
- on HTML attributes in requirements and document chapters, see chapter ["HTML Text Formatting Toolbar" on page 36](#)
- in documents, clicking the  icon scans for glossary entries, see chapter ["Detail Pane" on page 170](#)

Graph Editor

The graph editor allows you to create and modify sophisticated diagrams and graphs. This is a list of some of its features:

- Create new diagrams and graphs
- Edit existing diagrams and graphs
- Import Microsoft ® Visio files (in vsdx format)
- Provides a large number of shapes and charts
- Allows referencing of images (by URL)

Opening the Graph Editor

To open the graph editor in a requirement:

- 1 Open an existing requirement or create a new requirement.

- 2 Click into an HTML enabled text attribute.
- 3 Click .

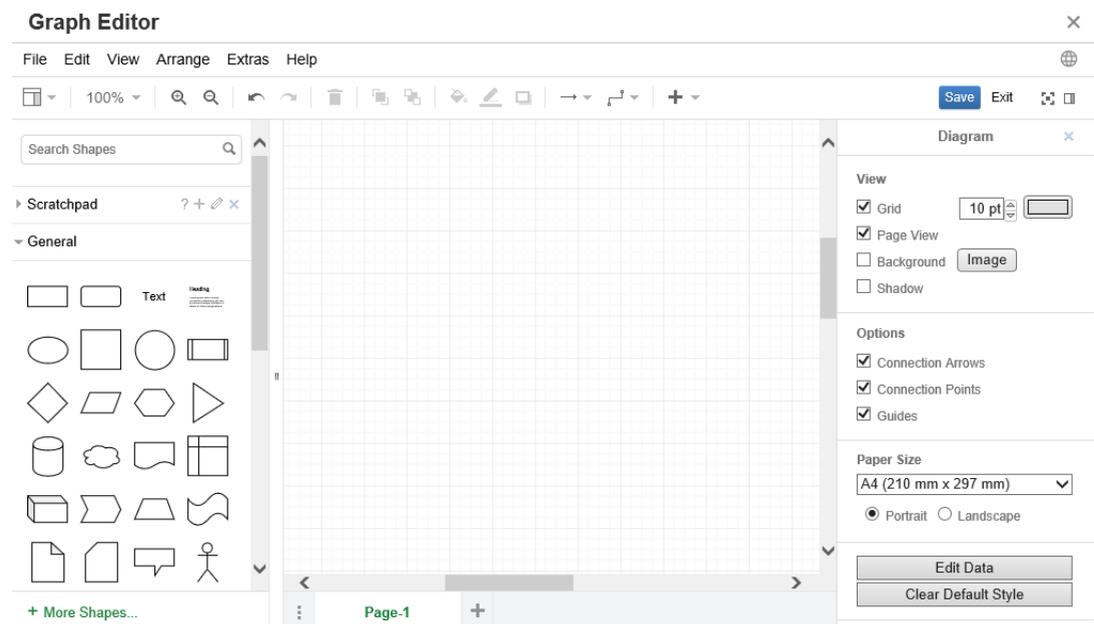
To open the graph editor in a document:

- 1 Open the chapter editor.
- 2 Click into the chapter description box.
- 3 Click .

The Graph Editor Dialog

The Graph Editor dialog allows editing diagrams and graphs. It is divided into these sections:

- Menu Bar
- Toolbar
- Shapes Panel
- Edit Area
- Diagram Panel or Format Panel



File Menu

The **File** menu provides the following functions:

- **Import from:** Allows import of Microsoft ® Visio files in vsdx format and other file formats. For further information about importing files, see chapter "[Importing Files](#)" on page 62.
- **Export as:** Allows to export the graph into different formats.
- **Page Setup:** Opens a dialog which allows you to choose:
 - Paper size
 - Orientation
 - Background color
 - Grid size (of the edit area)
- **Print:** Provides the following functions:
 - Printing
 - Preview
 - Scaling

Importing Files

The following file formats can be imported:

- MS Visio in **VSDX** format; other Visio formats (e.g. VSD) are not supported
- Images in GIF, JPG and PNG format
- HTML files

To import a file, do the following:

- 1 On the **File** menu, point to **Import from**, then select the file location:
 - a **Device...**: This opens the **Choose File to Upload** dialog. Then, select the file you wish to import and click **Open**.
 - b **URL...**: Enter the URL of the file you wish to import into the **URL** box.
- 2 Click **Import**.

Additional Information

Additional information on the Graph Editor can be found at <https://support.draw.io/display/D0/Draw.io+Online+User+Manual>.

Working with Comments

Overview

Comments can be added to chapters or requirements. Comments allow to discuss topics regarding a requirement or chapter. Rather than just discussing the topics by e-mail or personally, this allows to review all comments at any time, e.g. during an approval process.



NOTE To add a comment or reply to a comment, users must have the following permissions:

- **Create** permission on the Comment class
- **Read** permission on the requirement class
- **Create** permission on the relationship between the Comment class and the requirement class.

Managing Comments in Documents

The **Comments** group provides these functions:

- Filtering:** By clicking **New**, **Active**, **Done**, or **Rejected** buttons on top, you can filter by comments by state. The number on each state button shows the number of comments with that state.
-  **Show All:** By clicking it, all comments in the document are shown. Clicking it again shows comments only for the selected chapter or requirement.
-  **Add Comment:** Opens a text input field at the end of the comment list. To confirm your comment, click **Save**. To discard your comment, click **Cancel**.
-  **Refresh:** Reloads the comment list.
-  **Previous Comment:** Selects the previous comment in the list.
-  **Next Comment:** Selects the next comment in the list.

Managing Comments in Requirements

The **Comments** group provides these functions:

- Filtering:** By clicking **New**, **Active**, **Done**, or **Rejected** buttons on top, you can filter by comments by state. The number on each state button shows the number of comments with that state.
-  **Add Comment:** Opens inputs at the bottom of the **Edit Attributes** dialog. To confirm your comment, click **Save**. To discard your comment, click **Close**.
-  **Refresh:** Reloads the comment list.

Comment States

A comment can have one of these states:

-  **New:** This comment has not been read by the current user.
-  **Read:** This comment has been read and has not been incorporated or rejected.
-  **Done:** This comment has been incorporated.
-  **Rejected:** This comment has been rejected.

Comment Functions

A comment provides these functions:

-  **Incorporate:** Accepts/incorporates the comment.
-  **Reject:** Rejects the comment.
-  **Delete:** Deletes the comment. You can only delete a comment if it matches all of the following conditions:
 - The comment is your own comment.
 - There are no replies to this comment.
-  **Reply:** Adds a new comment as a reply. The text box to enter the comment is created within the comment.
To confirm your reply, click **Save**.
To discard your reply, click **Cancel**.
-  **Show Replies:** Shows the replies within the comment.
-  **Hide replies:** Hides the replies for the comment.

Adding a Comment to a Requirement from the Actions Pane

To add a comment to a requirement from the actions pane, do the following:

- 1 Select a requirement (e.g. on Home View, Quick Search or Document View).
- 2 Select **Add Comment** in the **Requirements** set of the **Actions** pane. This opens the **Add a Comment** dialog.
- 3 Enter a heading into the **Subject** box and your comment into the **Comment** box.
- 4 Fill out or select any other attributes as desired or required.
- 5 Click one of the following:
 - **Save:** Adds the comment to the selected requirement and keeps the dialog open.
 - **Close:** Adds the comment to the selected requirement and closes the dialog.

Adding a Comment from a Discussion

To add a comment from within a discussion, do the following:

- 1 Open a requirement for editing.
- 2 Expand the **Comments** section.
- 3 Click **+** or click **Reply** for a specific comment. This adds the required attributes **Subject** and **Comment** to the dialog as well as other attributes your administrator configured.



NOTE If you are starting a new discussion, type the subject of the discussion in the **Subject** box. If you are replying to a comment, the title is already filled in and has *Re.* pre-pended to it. If you change the title, the comment is no longer part of the original discussion thread, but will start a new discussion.

- 4 Fill out or select any other attributes as desired or required.
- 5 Click one of the following:
 - **Save:** Adds the comment to the selected requirement and keeps the dialog open.
 - **Close:** Closes the dialog without saving the comment.

Adding a Comment in a Document

To add a comment in a document, do the following:

- 1 Open the desired document.
- 2 Expand the **Comments** set in the **Actions** pane.
- 3 Select the chapter or requirement in the document tree to which you want to add the comment.
- 4 Click **+** or click **Reply** for a specific comment. This adds the required attributes **Subject** and **Comment** to the dialog as well as other attributes your administrator configured.
- 5 Enter your comment and click **Save**.

Replying to a Comment

In documents, you can quickly reply to a comment of a requirement or chapter by executing these steps below. If the comment belongs to a requirement which is not part of a document, see chapters "[Adding a Comment to a Requirement from the Actions Pane](#)" on page 64 or "[Adding a Comment from a Discussion](#)" on page 65.

To reply to a comment in a document:

- 1 Open the desired document.

- 2 Select the root chapter in the document tree.
- 3 Expand the **Comments** set of the **Actions** pane.
- 4 If desired, filter the comments (see chapter "[Managing Comments in Documents](#)" on [page 63](#) for details).
- 5 For the desired comment, click **Reply**.
- 6 Enter your comment and click **Save**.



NOTE Adding comments as described above, does not allow to enter or select any other attribute values. To get the full interface for comments, see one of the following chapters:

- "[Adding a Comment to a Requirement from the Actions Pane](#)" on [page 64](#)
- "[Adding a Comment from a Discussion](#)" on [page 65](#)
- "[Adding a Comment in a Document](#)" on [page 65](#)

Adding a Comment to Text

In documents, comments can be added to any word in a chapter or requirement. After the comment is added, the word to which the comment has been added is highlighted. By clicking the comment, you navigate to the related chapter or requirement in the Document View.

To add a comment, do the following:

- 1 Select the word to which you want to add the comment.
- 2 In the **Comments** section of the **Actions** pane, click **+**.
- 3 Add your comment.
- 4 Click **Save**.

Opening the Full Interface

If you open an object (requirement, document, snapshot, collection, or baseline) through a link you receive from a third party, you may have to log in.

When logging in, you can enable the **Also open full interface** option, which displays the navigation elements for the related view as well as the object you opened. For Single Sign On (SSO), the **Also open full interface** option is not available.

If the object has been opened with the limited interface (either because the **Also open full interface** option was not selected or due to SSO log in), click **Open in full view** in the top right corner of the screen to show the full interface.

Viewing Version, System, and Contact Information

To view version and system information:

- 1 Click the **About** link in the upper right of RM Browser. The **About Dimensions RM** dialog box opens.
The following information is displayed:
 - **Version:** The version of Dimensions RM you are using.
 - **Web Server:** The type of Web server that is hosting RM.
For example, Apache/Tomcat 6.0.26(Win32).
 - **Web Server OS:** The operating system in use on the Web server.
 - **Database:** The Oracle version in use.
 - **Browser Name:** The name of browser software you are using.
 - **Browser Agent:** Version specific information about the browser software you are using and its features.
 - **Attributions:** Third-party tools utilized by RM Browser.
- 2 **E-mail config info to Serena:** Click this button if you are working with Serena Customer Support on an issue and have been asked to send the configuration information.
- 3 For links to Serena's home page, Serena contact information, and other useful links, see the **Contact Information** tab.

Sample Databases

Two sample databases are included with Dimensions RM. If your administrator has installed them, you may find them to be a convenient way to get acquainted with the features of Dimensions RM.

The QLARIUS_RM Sample Database

The QLARIUS_RM sample database lets business analysts and product managers quickly understand how the key functionality of Dimensions RM is beneficial in their own requirement lifecycles. QLARIUS_RM demonstrates how requirements are categorized and stored, and how the requirements lifecycle is automated and enforced. QLARIUS_RM provides predefined requirement classes, links between classes, and built-in reporting.

The default users and passwords for the QLARIUS_RM instance are listed in the following table.

QLARIUS_RM	
User Name	Password
DMSYS	rtm
MARK	mark

QLARIUS_RM	
User Name	Password
PETA	peta
QLARIUSADMIN	rtm
QUIN	quin
SALLY	sally
TED	ted

The RMDEMO Sample Database

RMDEMO is another sample database that provides a rich set of Dimensions RM features and functionality.

The default users and passwords for the RMDEMO instance are listed in the following table.

RMDEMO	
User Name	Password
ADMINISTRATION	rtm
DEVELOPMENT	rtm
ENGINEERING	rtm
EPHOTO	rtm
EPHOTO_INFO	rtm
JOE	joe
MANAGEMENT	rtm
MARKETING	rtm
RMDEMOADMIN	rtm
RTMADMIN	rtm
SALES	rtm
SUPPORT	rtm
TECH_PUBS	rtm
TEST	rtm
TRAINING	rtm

Using Spell Check in RM Browser

Dimensions RM supports spell checking in these requirement input fields:

- Text boxes
- HTML Text boxes in Edit Attributes dialog or Editable Grid

Configuring Internet Explorer

Internet Explorer allows spell check for several languages. Note that only one language can be used at a time. The default language for spell check is either the language of your Windows installation or English.

To configure Spell Check in Internet Explorer 11, execute these steps:

- 1 Do one of the following
 - Click the cog, then select **Manage add-ons** from the shortcut menu.
 - Press the **Alt** key and release it, then select **Manage add-ons** from the **Tools** menu.
- 2 In the **Add-on Types** list, select **Spelling Correction**.
- 3 Ensure that the **Enable spelling correction** option is selected.
- 4 To change the spell check language, right-click the desired language and select **Set as default** in the shortcut menu.
- 5 Click **Close**.

Configuring Edge

Edge allows spell check for any dictionary installed to Windows. Note that only one language can be used at a time. The default language for spell check is the language of your Windows installation. To install additional dictionaries, see chapter "[Installing additional Dictionaries](#)" on page 69.

To correct a word in the current language:

- 1 Right-click the incorrect word. This opens a shortcut menu.
- 2 Select the correct spelling from the shortcut menu.

To correct a word in a different language for which a dictionary has been installed:

- 1 Select the incorrect word (left-click).
- 2 In systray, click the language shortcut next to the keyboard symbol (near the clock in the Windows taskbar). This opens a list of the installed languages and input methods.
- 3 Select the language you want to use for the spell check.
- 4 Right-click the incorrect word. This opens a shortcut menu.
- 5 Select the correct spelling from the shortcut menu.

Installing additional Dictionaries

To install dictionaries, do the following:

- 1 Click the Windows start menu button.

- 2 Select the cog (Settings).
- 3 Select **Time & language**.
- 4 Select **Region & language**.
- 5 Click **Add a language**. This opens a list of available languages.
- 6 Select the desired language from the list. This starts the download and installs the dictionary.

Configuring Firefox

Firefox allows spell check for several languages. Note that only one language can be used at a time. The default language for spell check is the language of your Firefox installation.

To configure Spell Check in Firefox 61, execute these steps:

- 1 Do one of the following
 - Click ☰ , then select **Options** from the menu.
 - Press the **Alt** key and release it, then select **Options** from the **Tools** menu.
- 2 Type **Spelling** into the search box.
- 3 Ensure that the **Check your spelling as you type** option is selected.

Installing additional Dictionaries

To install dictionaries, execute these steps:



CAUTION! Dictionaries in Firefox are add-ons. Only install dictionaries if the policies of your organization allow installation of add-ons.

- 1 Do one of the following
 - Click ☰ , then select **Add-ons** from the menu.
 - Press the **Alt** key and release it, then select **Add-ons** from the **Tools** menu.
- 2 Select **Extensions** from the left pane.
- 3 Type a search expression into the search box, e.g. *German dictionary*.
- 4 Click one of the results which matches your preferred dictionary. This opens the **Add-ons** page for that dictionary.
- 5 Click **Add to Firefox**.
- 6 After download is complete, click **Add**.

Using Spell Check

Firefox allows spell checking for any language a dictionary has been installed. To install dictionaries, see chapter "[Installing additional Dictionaries](#)" on page 70.

To check the spelling of a text field, execute these steps:

- 1 Right-click the text field you want to check.
- 2 From the shortcut menu, select **Check Spelling**. This uses the language of your most recent spell check.
- 3 To repeat the spell check with a different language, execute these steps:
 - a Right-click the text field you want to check.
 - b In the **Languages** menu, select the language you want to use for your spell check.

Configuring Chrome

Chrome allows spell checking for any language a dictionary has been installed. To install dictionaries, see chapter "[Installing additional Dictionaries](#)" on page 71.

To enable or disable spell check in Chrome 78, execute these steps:

- 1 Click , then select **Settings** from the menu.
- 2 Click **Advanced**.
- 3 Select **Languages**.
- 4 Expand the **Language** section.
- 5 To enable or disable spell check, switch the slider next to the word **Spell check**. Spell check is enabled when the switch is on the right.

Installing additional Dictionaries

To add a dictionary to Chrome 78, execute these steps:

- 1 Click , then select **Settings** from the menu.
- 2 Browse to the end of the page and click **Advanced**.
- 3 Select **Languages**.
- 4 Expand the **Language** section.
- 5 Click **Add languages**.
- 6 In the **Languages** list, select the language you want to use. Note that not all languages can be used for spell checking.
- 7 Click **Add**.
- 8 To enable or disable spell check, switch the slider next to the word **Spell check**. Spell check is enabled when the switch is on the right.

Chapter 2

Configuring User Settings and Instance Settings

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User Settings Versus Instance Settings

By default, RM Browser uses the instance settings that are in effect for a given instance. If the RM administrator changes the instance settings, this affects all users who have not specified their own settings. Each user can override the instance settings by specifying their own. The following sections describe user settings and instance settings.



NOTE

- If this guide refers to a **Use Instance settings** checkbox, this checkbox only exists in the **User Settings** dialog.
- Some settings are grayed out and cannot be edited in the **User Settings** dialog. These settings are administrative settings and can only be changed in the **Instance Settings** dialog (thus affecting all users).

Configuring User Settings and Instance Settings

The following sections describe how to specify user and instance settings. Each sub-chapter refers to the settings you select in the pane on the left hand side.

To open the User Settings dialog:

Select **User Settings** from the **Welcome** menu at the top right corner of the screen.

To open the Instance Settings dialog:

Select **Instance Settings** from the **Administration** menu. Note that **Instance Settings** are only available to members of the Administrator group.

General Settings

Locale

Administrators or Users have the ability to localize the UI: to change the default language. Available languages include: Chinese, English, German and Japanese.

Client Session Idle Timeout

This setting can only be changed in the **Instance Settings** dialog.

After a period of inactivity, an RM Browser session times out, and you are logged out of RM Browser. A login dialog opens so you can log in again. By default, the session timeout is 30 minutes.

To specify the RM Browser session time out value:

- 1 Type the number of minutes in the **Client session idle timeout (minutes)** box.
- 2 Click **OK**.

Categories: Show Inactive Categories

When this option is **enabled**, the category tree and all query dialogs show inactive categories. All objects (requirements, documents, collections, baselines and reports) in an inactive category are read-only. Inactive categories are represented by a gray folder icon and the name in gray and italic text.

If this option is **disabled**, the category tree and all query dialogs do not show inactive categories. All objects (requirements, documents, collections, baselines and reports) in an inactive category are not accessible.

To show or hide inactive categories, execute these steps:

- 1 Select **Instance Settings** from the **Administration** menu. This opens the **Instance Settings** dialog.
- 2 Select **General**.
 - **Enable:** Select the **Show Inactive Categories** box in the **Categories** section.
 - **Disable:** Clear the **Show Inactive Categories** box in the **Categories** section.

To activate or deactivate categories, see chapter "[Activating/Deactivating a Category](#)" on page 342.

Categories: Use Default Category from Breadcrumb

This option defines how the category for new objects (i.e. requirements, proposals, documents, collections, baselines, and reports) is pre-selected.

When this option is **enabled**, the pre-selected category for new objects will be identical to the category shown in the bread crumb.

If this option is **disabled**, the pre-selected category for new objects will be identical to the category that was used last in any dialog or tab, when creating a new object.

Container: Automatic Refresh

You can choose whether all containers and collections based on reports should be refreshed by default when they are opened. Should collections based on reports significantly slow performance, you can choose to manually refresh their content as needed. For further information, see chapter "[Refreshing the Contents of a Collection](#)" on page 275.

To automatically refresh containers based on reports:

- 1 In the **Containers** section, select the **Automatic Refresh** checkbox.
- 2 Click **OK**.

Team Settings

This setting can only be changed in the **Instance Settings** dialog.

To enable teams, execute these steps:

- 1 Select **Instance Settings** from the **Administration** menu. This opens the **Instance Settings** dialog.

- 2 Select **General**.
- 3 Select the **Teams** option.
- 4 Click **OK**.

Agile

This setting can only be changed in the **Instance Settings** dialog.



IMPORTANT! Before enabling Agile, ensure that all required classes and relationships have been created by your Administrator. For further information on creating classes and relationships see chapter "Agile" in *Dimensions RM Administrator's Guide*.

To enable Agile, execute these steps:

- 1 Select **Instance Settings** from the **Administration** menu. This opens the **Instance Settings** dialog.
- 2 Select **General**.
- 3 Select the **Agile** option.
- 4 Click **OK**.

Once Agile has been enabled, the **Agile Settings** option will appear on the **Administration** menu. The **Agile Settings** allow the administrator to map Agile classes and to further define Agile relationships. For further details, see chapter "[Configuring Agile](#)" on page 377.

Home Settings

Tabs

By changing the **Tabs** setting, you can choose which Tabs you want to use in the Home View and the order of those tabs.

All tab names in the **Available Tabs** list will not be shown in the Home View.

All tab names in the **Visible Tabs** list will be shown in the Home View in the order of the list (top entry in the list is the left-most tab in the Home View).

Recent Items

You can choose which items the **Recent** list on the Home View should display:

- **Document / Snapshots:** If selected, the **Recent** list includes documents and snapshots. If cleared, the **Recent** list does not show documents and snapshots.
- **Requirements:** If selected, the **Recent** list includes requirements. If cleared, the **Recent** list does not show requirements.
- **Reports:** If selected, the **Recent** list includes reports. If cleared, the **Recent** list does not show reports.

- **Collections / Baselines:** If selected, the **Recent** list includes collections and baselines. If cleared, the **Recent** list does not show collections and baselines.

Requirements Settings

Concurrent Editing

This setting can only be changed in the **Instance Settings** dialog.

RM Browser can be configured to use locking or merging to handle the situation where multiple users edit a requirement, chapter, or document at the same time. If locking is in effect and another user has an item locked, you will see that the item is locked and by whom if you open it for editing.



NOTE Baseline Locked indicates that the item version is part of a baseline and thus cannot be modified. This is unrelated to concurrent editing mode.

To specify the concurrent editing mode:

- 1 If you want to lock a requirement while you edit it, which means that no other user can make changes without unlocking it, select **Lock requirements while editing**.
- 2 If you want to allow others to make changes to a requirement while you are editing it, which means that the changes must be merged later, click **Allow concurrent editing and merging**.
- 3 Click **OK**.

Display Settings for Classes

Limit Classes Displayed: Often users are not interested in viewing all available classes. This setting allows an individual user or an administrator to limit the classes shown as well as the order in which selected classes will be listed. This setting will only limit the classes displayed by default, and will not affect link visibility or the listing of requirements in containers.

Choosing **All Classes** with limited classes selected will initially search only classes displayed. To search all classes, including Chapter and Glossary, click on **Show More**.

Display Settings for User Attributes

This setting can only be changed in the **Instance Settings** dialog.

By changing this setting you can define how user attributes will be displayed. This affects custom attributes as well as the system attributes **Created By**, **Initial Created By** and **Modified By**.

To change the display settings, execute these steps:

- 1 Select **Instance Settings** from the **Administration** menu. This opens the **Instance Settings** dialog.
- 2 Select **Requirements**.

- 3 In the Display Settings for User Attributes section, select one of these options:
 - **Show User ID:** Shows only the user ID, e.g. JOE.
 - **Show User Full Name:** Shows only the user's full name, e.g. Joe Manager.
 - **Show User Full Name and User ID:** Shows the user's full name and ID, e.g. Joe Manager (JOE).
 - **Show User ID and User Full Name:** Shows the user ID and the full name, e.g. JOE (Joe Manager).



CAUTION! When importing user attributes, the setting must be **Show User ID**.

Workflow

This setting can only be changed in the **Instance Settings** dialog.

To allow automatic transition on non-current objects (e.g. requirements with current status "Replaced"), execute the following steps:

- 1 Select **Instance Settings** from the **Administration** menu. This opens the **Instance Settings** dialog.
- 2 Select **Requirements**.
- 3 Select **Execute automatic transition on non-current objects**.

Attachment

This setting can only be changed in the **Instance Settings** dialog.



IMPORTANT! This setting forces RM Browser users to save file attachments before opening.

To force users to save attachments before they can be opened, execute these steps:

- 1 Select **Instance Settings** from the **Administration** menu. This opens the **Instance Settings** dialog.
- 2 Select **Requirements**.
- 3 At the **Attachment** option, select the box labeled **Disable automatic opening**.
- 4 Click **OK**.

Text Field Height

This setting can only be changed in the **Instance Settings** dialog.

The **Text Field Height** setting defines the height of the multi-line text field.

The following options are available:

- **Auto:** The default behavior

- **Fixed:** Selecting this option shows an input field which allows you to enter the height of text fields in pixels. Values must be between 50 and 2147483647.

Container

This setting can only be changed in the **Instance Settings** dialog.

The **Container** settings define if copied requirements are added to the original container.

The following options are available:

- **Add copied requirements to same collections as original requirements:** Copied requirements are added to the same collection as the source requirements are located in.
- **Add copied requirements to same documents as original requirements:** Copied requirements are added to the same document as the source requirements are located in.



NOTE When creating a document and having the **Copy Requirements** option enabled (see chapter "[Creating a New Document](#)" on page 181 for details), the original document will **not** receive the copies used in the new document.

Change Proposal: Change Reason

This setting can only be changed in the **Instance Settings** dialog.

You can require users to specify change reasons for new and changed proposals. For further information about proposing requirements, see chapter "[Proposing a New Requirement](#)" on page 112.

The following rules apply to change reasons depending on whether they are set to mandatory:

- When replacing requirements, the change reason is mandatory in the edit page.
- When updating requirements, even if the change reason is mandatory, if you do not enter a new reason the previously entered reason will be carried forward.
- When rejecting requirements.

To require change reasons for change requests:

- 1 Select **Instance Settings** from the Administration menu. This opens the **Instance Settings** dialog.
- 2 Select **Requirements**.
- 3 Select either of the following in the **Change Reason** section:
 - **Make Change Reason mandatory for Propose New**
 - **Make Change Reason mandatory for Propose Change**

Change Proposal: Non-Current Objects

This setting can only be changed in the **Instance Settings** dialog.

When selecting this option, users can propose changes for a requirement which has the status "Replaced".

To allow Change Proposals for replaced requirements:

- 1 Select **Instance Settings** from the **Administration** menu. This opens the **Instance Settings** dialog.
- 2 Select **Requirements**.
- 3 Select **Enable Propose Change for non-current objects**.

Clear Suspect Links: New Version Automatically Clears Suspect Links

This setting can only be changed in the **Instance Settings** dialog.

When this option is **enabled**, suspect links are automatically cleared when replacing a requirement.

If this option is **disabled**, suspect links must be cleared manually when replacing a requirement.

Clear Suspect Links: Confirm Clearing Suspect Links on Replace

This setting can only be changed in the **User Settings** dialog.

Users can only change this option if the option **New version automatically clears suspect links** has been disabled by the administrator.

When this option is **enabled**, a dialog is shown which allows to clear all suspect links on a Replace operation.

If this option is **disabled**, the requirement will be replaced without clearing the suspect links.

Change Class

These settings can only be changed in the **Instance Settings** dialog.

The **Change Class** settings define the behavior when changing the class of a requirement or changing a chapter into a requirement.

To modify the Change Class settings, execute these steps:

- 1 Select **Instance Settings** from the **Administration** menu. This opens the **Instance Settings** dialog.
- 2 Select **Requirements**.
- 3 At the **Change Class** setting, modify any of the following options:
 - **Retain Workflow State:** This option can be used if you have classes using Workflows (see chapter "[Workflows](#)" on page 105 for more details). If you do not use Workflows, you can ignore this option.

If this option is selected, the Workflow state is used with the new class, provided that the new class has a Workflow and a Workflow state with the same name exists.

If this option is not selected, or the Workflow state does not exist, the class change will be executed without considering the Workflow state.

- **Retain Links:** If this option is selected, all links will be preserved, provided that the new class allows to link to the same class. The **Links** section of **Change Class** dialog shows which links can be retained and which links will be removed when executing the change.

If this option is not selected, all links will be removed.

- 4 Click **OK**.

Quick Search Settings

Displayed Columns and Sort Order

By default, instance display properties determine the columns that are displayed in the Quick Search results for a specific class. You can personalize your Quick Search results, overriding the instance settings.



NOTE The instance defaults are set by the administrator in the **Instance Settings** dialog.

To change the columns displayed in Quick Search results:

- 1 Select a class in the **Choose a class** list. The **Attributes To Display** and **Sorting Order** sections are displayed.
- 2 **Use Instance settings:** Deselect this checkbox to override the display and order settings set by your administrator at the instance level for the selected class.



NOTE This first **Use Instance settings** checkbox appears in the upper portion of the dialog just below the Sorting Order controls. It applies only to the display and order settings of the selected class. You cannot edit these settings until you disable this checkbox.

- 3 To specify the columns to display, see chapter "[Attributes to Display List](#)" on page 34.
- 4 To specify the sort order, see chapter "[Sorting Order List](#)" on page 35.
- 5 Select another class, if necessary, and repeat the preceding steps.



NOTE You do not have to click **Apply** before you select another class. The changes you make are remembered as long as the dialog box is open.

Additional Settings

Automatically run default query: Select this checkbox to run the most recently used search criteria when you open the page. If this feature is not enabled, the Quick Search fields will be populated with the criteria of the most recent search, but no results will be displayed until you click the Search button.

Use Instance settings: Select this checkbox to override your local pagination settings with those set by your administrator at the instance level.



NOTE This second **Use Instance settings** checkbox appears in the lower portion of the dialog and applies only to the pagination settings. You cannot edit these settings until you disable this checkbox.

Activate Pagination: Select this checkbox to break the results up into multiple pages if they exceed a certain quantity. Specify that quantity in the **Number Of Records Display Per Page** field.



NOTE By default, only current requirement versions are shown in the results even if a baseline or snapshot is selected. To see the actual versions used in a baseline or snapshot, select the **Automatically activate query across all requirement versions if baseline or snapshot is selected** checkbox.

Split View

For configuration of Quick Search's Split View, see chapter "[Split View Settings](#)" on page 87.

Hierarchy Settings

The hierarchy settings define which attributes should be displayed or exported.

Attributes to Display

To allow modification of the **Attributes to display in the tree** or **Attributes to display in the tooltip** lists, ensure that the **Use Instance settings** box is cleared. Both lists work in the same way as described in chapter "[Attributes to Display List](#)" on page 34.

Attributes to Export

To allow modification of the **Attributes to export** list, ensure that the **Use Instance settings** box is cleared. The list works in the same way as described in chapter "[Attributes to Display List](#)" on page 34.

Add Requirements at

The **Add Requirements at** option defines at which position in a chapter the requirements are added in the tree:

- **Start of chapter:** Adds the requirement as the first requirement.
- **End of chapter:** Adds the requirement as the last requirement.

Order

The **Order** option defines how the Hierarchy View displays folders and requirements.

- **Folders before requirements:** Categories are displayed first, requirements follow the last category.

- **Requirements before folders:** Requirements are displayed first, categories follow the last requirement.

Document Settings

Title Numbering

In Documents View in RM Browser, requirements and chapters are numbered. By default, when you publish a Microsoft® Word document from Documents View, the Word document includes the numbers you see in the document in Documents View.

To prevent the numbers from appearing in the Word document:

- 1 Use Instance settings:** Deselect this checkbox in order to use your own numbering settings rather than those in the instance settings.
- 2 Publish Chapter Title numbering:** Clear this check box if you want to create your own styles in Word for chapters that include automatic numbering. In this case, the automatic numbering may not match the numbers that you see in the document in Document View.
- 3 Publish Requirement Title numbering:** Clear this check box if you want to create your own styles in Word for requirements that include automatic numbering. In this case, the automatic numbering may not match the numbers that you see in the document in Document View.
- 4** Click **OK**.

Autoloading of Documents

You set the default for autoloading of documents, that is, the document that was last opened in the previous RM Browser session is opened in the next session.

To set autoloading of documents:

- 1** Select or clear the **Auto load document** check box.
- 2** Click **OK**.

Lock Document During Edit

This setting can only be changed in the Instance Settings dialog.

If this option is enabled, the system automatically ensures that only one person can open a document in edit mode. A concurrent user opening the document is notified that the document is locked.

If this option is **not** enabled, an open document may be manually locked or, in the event that several users simultaneously edit a document, edits may be merged.

Manually Locking an individual document:

Users may 'declare' ownership of a document over time by selecting the **Lock** function under the **Actions** pane. The document will remain locked, even across multiple edit sessions, until the user chooses to unlock it. Should the user inadvertently leave the document locked, an administrator may unlock it (see "[Managing Document Locks](#)" on page 346).

While a document is manually locked, other users opening the document will receive a warning that the document has been opened in read only mode; the *name of the user responsible for locking the document is displayed to the right of the document title.*

Merging document edits:

The following discusses the merge operation, should 2 users modify the document simultaneously. The users in this example are JOE and EPHOTO:

Example 1:

JOE adds a chapter. EPHOTO adds a chapter after JOE.

EPHOTO will find JOE's chapter in his document tree, but JOE will not find EPHOTO's chapter in his document tree.

Resolution: JOE would either have to click  or add another chapter (which refreshes the document tree).

Example 2:

Both, JOE and EPHOTO, open the same chapter for editing. JOE saves his modifications first.

EPHOTO receives a warning that JOE made changes and that his changes can only be saved after the conflict has been resolved. For further information about resolving conflicts, see chapter "[Merging Chapter Changes](#)" on page 208.

Default Requirement Layout

The **Default Requirement Layout** option defines the default layout for requirements in a document. This default is only used when creating a document. After a document has been created, the default for that document can be changed with the **Format Document** or **Format Chapter** settings as described in chapters "[Formatting Documents](#)" on page 186 and "[Formatting Chapters](#)" on page 201.

To change the default requirement layout:

- 1 In the **Document Settings** section, select one of these options from the **Default Requirement Layout** list box:
 - Editable Grid
 - Grid
 - Paragraph
- 2 Click **OK**.

Default Document View Mode

The **Default Document View Mode** option defines how the detail pane of Document View displays the document. These modes are available:

- **Chapter:** Displays only the selected chapter and the child requirements.
- **Entire Document:** Displays the whole document.



NOTE You can also change the setting in Document View (see chapter "[Detail Pane](#)" on page 170). If you do, this updates the setting within the User Settings.

Add Requirements at

The **Add Requirements at** option defines at which position in a chapter the requirements are added when the chapter is selected:

- **Start of chapter:** Adds the requirement as the first requirement.
- **End of chapter:** Adds the requirement as the last requirement.

Default Workflow

The **Default Workflow** setting allows you to select a workflow that is used with documents and snapshots. This selected default workflow is used with any new document. The default workflow can be changes when creating a document.

Report Settings

Traceability Settings

Traceability reports can be displayed in either Gap View and Outline View. The default view is defined in the User Settings dialog.

To set the default view:

- 1 In **Traceability Settings, Default View**, select **Gap** or **Outline** from the list box.
- 2 Click **OK**.

Relationship Constraint Mode Settings

With the **Relationship Constraint Mode** setting, users can define how the relationship (specified as a **Relationship Constraint** for the executed report) between 2 requirements is evaluated.

By default, the **Only Current** setting is turned off. This means that a report will return a related requirement, even if its Status is other than "Current".

By turning on the **Only Current** setting, a report will only return related requirements with Status "Current".

This setting affects the relationship evaluation in both directions, outgoing relationship (from a requirement to another requirements) and incoming relationship (from another requirements to a requirement).

Link Browser Settings

For Link Browser, you can change the colors for each class and the node radius.

Use Instance Settings: Deselect the checkbox to use your own settings, or select it to use instance settings.

Predefined Colors

To change the class color by using predefined colors:

- 1 Select a class name from the **Choose a class** list.
- 2 Select a color from the **Choose a color** list.
- 3 Click **OK**.

Color Picker

The color picker allows you to select or define a color by entering values.

To change the class color by using the color picker:

- 1 Select a class name from the **Choose a class** list.
- 2 **Do one of the following:**
 - a From the vertical color bar, select the color range. Then, select the color in the preview box.
 - b Enter the desired values into the **H** (hue), **S** (saturation), and **V** (brightness) boxes.
 - H:** Valid range 0 to 359
 - S:** Valid range 0 to 100
 - V:** Valid range 0 to 100
 - c Enter the desired values into the R (red), G (green), and B (blue) box. The valid range for R, G, and B is 0 to 255.
 - d Enter the hex value for the color. The hex value follows the RGB schema. Each color is represented by 2 characters, e.g. #ffeedd means R (ff)=255, G (ee)=238 B (dd)=221.
- 3 Click **OK**.

To change the node radius:

- 1 Ensure that the **Use Instance Settings** box is cleared before changing.
- 2 Do one of the following:
 - a Enter a number (minimum 40) into the **Node radius (px)**.
 - b Select the **Fit to PUID** check box. This will adjust the node radius to fit the length of the requirement ID.
- 3 Click **OK**.

Attributes to Display

To allow modification of the **Attributes to display** or **Attributes to display in tooltip** lists, ensure that the **Use Instance settings** box is cleared.

The lists attributes to display and Attributes to display in tooltip work in the same way as described in chapter ["Attributes to Display List" on page 34](#). However, for this **Attributes to display** list, the following restrictions apply:

- It can only display up to 3 attributes as to avoid too much text in the requirement node.
- Virtual attributes (e.g. <Collection>) are not supported.

Split View Settings

For the Split View mode of Quick Search you can define separately which columns you want to display in Split View mode.

To change the columns displayed in Split View mode:

- 1 Select a class in the **Choose a class** list. The **Attributes To Display** and **Sorting Order** sections are displayed.
- 2 **Use Instance settings:** Deselect this checkbox to override the display and order settings set by your administrator at the instance level for the selected class.
- 3 To specify the columns to display, see chapter ["Attributes to Display List" on page 34](#).
- 4 To specify the sort order, see chapter ["Sorting Order List" on page 35](#).
- 5 Select another class, if necessary, and repeat the preceding steps.



NOTE You do not have to click **Apply** before you select another class. The changes you make are remembered as long as the dialog box is open.

- 6 **Auto Run Query:** Select this checkbox to run the most recently used search criteria when you open the page. If this feature is not enabled, the Quick Search fields will be populated with the criteria of the most recent search, but no results will be displayed until you click the Search button.
- 7 **Limit Number Of Records Displayed In Grid:** Specify the number of records to be displayed.
- 8 Click **OK**.

Branch/Sync View Settings

Displayed Columns

For the Branch View mode of Quick Search, you can define separately which columns you want to display in Branch View mode.

To change the columns displayed in Branch View mode:

- 1 Select a class in the **Choose a class** list. The following sections are displayed:

- **Attributes To Display**
 - **Sorting Order**
 - **Attributes to provide/merge from Project to Product**
 - **Attributes to provide/merge from Product to Project**
- 2 **Use Instance settings:** Deselect this checkbox to override the display and order settings set by your administrator at the instance level for the selected class.
 - 3 To specify the columns to display, see chapter "[Attributes to Display List](#)" on page 34.
 - 4 To specify the sort order, see chapter "[Sorting Order List](#)" on page 35.
 - 5 Select another class, if necessary, and repeat the preceding steps.



NOTE You do not have to click **Apply** before you select another class. The changes you make are remembered as long as the dialog box is open.

- 6 Click **OK**.

Copying selected Attribute Values on Provide/Merge

This setting is only available on the **Instance Settings** dialog.

To change the attributes copied by provide/merge:

- 1 Select a class in the **Choose a class** list. The following sections are displayed:
 - **Attributes To Display**
 - **Sorting Order**
 - **Attributes to provide/merge from Project to Product**
 - **Attributes to provide/merge from Product to Project**
- 2 Select the desired attributes in the **Attributes to provide/merge from Project to Product** and/or **Attributes to provide/merge from Product to Project** lists.
- 3 Select another class, if necessary, and repeat the preceding steps.



NOTE You do not have to click **Apply** before you select another class. The changes you make are remembered as long as the dialog box is open.

- 4 Click **OK**.

Additional Settings

Provide with Links: Selecting this option defines the default of the option with the same name on the **Provide** dialog.

Activate Pagination: Select this option to break the results up into multiple pages if they exceed a certain quantity. Specify that quantity in the **Page Size** field.

Follow Settings

This setting can only be changed in the **Instance Settings** dialog.



IMPORTANT! The e-mails generated by Follow settings will only be sent if the Micro Focus Mail Service has been configured and is running. For further information on Mail Service configuration, see chapter "RM Mail Service" in the *Dimensions RM Administrator's Guide*.

Email Subject

The **Email Subject** box contains the text used as the subject for the notification e-mail. **Email Subject** can contain placeholders (see box below for further details).

Email Text

The **Email Text** box contains the body text used of the notification e-mail. **Email Text** can contain placeholders (see box below for further details).



NOTE With **Email Subject** and **Email Text** you can use placeholders which are filled with the attribute values of the requirement.

- **Regular attributes:** The placeholder uses the attribute name (**not the Display Name**) of an attribute with this format: `<#ATTRIBUTE_NAME#>`

Example: In RMDemo, the **Rqmt ID** attribute for the **Marketing_Requirements** class has the attribute name **PUID**. The placeholder would look like this: `<#PUID#>`.

- **Special attributes:** The placeholder uses the script name with this format: `<#SCRIPT_NAME#>`

Example: The `<Links Out Details>` attribute has the script name **RTM_LINKS_FROM_DETAILS**. The placeholder would look like this: `<#RTM_LINKS_FROM_DETAILS#>`. For further information about special attributes, see chapter "Special Attributes" on page 54.

Chapter 3

Working with Requirements

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Requirement Basics

Finding Requirements with Quick Search

The Quick Search pane in Requirements View allows you to easily find requirements. You can filter the content by category, class, attribute and container. By default, the Quick Search pane is displayed when you navigate to Requirements View.

Click  to execute or to refresh the search.

To run a query using the Quick Search pane:

- 1 Enter a word or string to narrow the query results to requirements that contain that text in one of their attributes.
 - If you enclose a string in quotation marks, the search returns requirements containing the whole string, even if there are spaces between words in the string.
 - If you do not enclose a string in quotation marks, the search returns requirements containing each of the individual words in the string.
- 2 From the **Options** drop-down, you may choose one or more of the following options:
 - **PUID:** Select this checkbox, if you want to limit your search to the *PUID* attribute (the version independent ID) of the requirements. Depending on the class configuration, the PUID may have a different name.
 - **Title:** Select this checkbox, if you want to limit your search to the *Title* attribute of the requirements. Depending on your class configuration, the Title attribute may have a different name.
 - **Description:** Select the checkbox if you want to search the *Text* attribute. Depending on your class configuration, the Text attribute may have a different name.



NOTE

- If you clear the **PUID**, **Title** and **Description** checkboxes, text and alphanumeric attributes that are visible are searched as well. System attributes are not searched.
- Selecting or clearing the **PUID**, **Title** and **Description** checkboxes defines what is searched, but not what is displayed. The displayed columns are always the same. To change the displayed columns see chapter "[Quick Search Settings](#)" on page 81.
- **Include Subcategories:** Select this checkbox to query results from the current category and child categories. Clear this checkbox to query results only in the current category.

- **Exclude Provided:** If you use Branching/Merging, selecting this option will only return requirements which have not been merged. For further information on branching/merging, see chapter "[Branching and Merging Requirements](#)" on page 152.
- 3 You can restrict your search by choosing any of: **Classes and Attributes**, **System Attributes**, and **Containers**. To edit these search settings, expand the Search Definition click .
 - **Classes and Attributes**
 - To add more than one class click on the rightmost plus icon
 - To add attributes, click on the plus icon next to the class list
 - When choosing multiple Class Attributes, i.e., more than one custom attribute within a selected class, it is possible to filter using a combination of 'AND' and 'OR' statements. For example, the search may include items with a High priority **or** items within a specific domain.
 - **System Attributes:** Allows to select attributes like Current Status or Time Modified which exist with all requirement classes.
 - **Containers:** Allows to find requirements which by checking their existence in a container. The search is configured by three drop downs:
 - a By selecting **In** or **Not In**, you define if the requirement must be in a container or not.
 - b Select the container type: **Collection**, **Baseline**, **Document**, or **Snapshot**.
 - c Select one or several containers (e.g. collections).



TIP To find your container more easily, type part of the container name into the drop-down box.

- 4 If you chose to search by attribute, select the attribute and chose **Is** or **Is Not** to compare an attribute having a value. Choose **Null** to include requirements with an empty attribute. Choosing **Not Null** includes requirements where the selected attribute is not empty.
- 5 Click the plus icon to add a new search criteria or click the minus icon to remove search criteria.
- 6 If you choose **Container** or **Versions**, select **In** or **Not In** and choose to include or exclude the following from the search:
 - a A specific container
 - b A version at a specific state such as *Current*
- 7 To change the **Category**, there are two options:
 - a Change the category for the whole search by choosing from the category drop-down list.
 - b Change the category for a single container by clicking on the link following the folder icon next to the container list

- 8 Click  to execute the search.



TIP

- To reset the Quick Search configuration, click on **Default Filter** in the **Actions** pane.
- For multi-selection of requirements, see chapter "[Selecting Multiple Requirements](#)" on page 33.



NOTE Previous versions of RM Browser included empty sections if a search was made over all classes. With Dimensions RM 12.4.1, RM Browser only includes sections which contain requirements.

Finding Requirements with Group Attributes

Normally, all attributes have to match for making a query. As group attributes behave like a table with one or several values per row, Quick Search allows to define how the values in should be considered for the search. You can select one of the following:

- Is (AND)
- Is (OR)
- Is not (AND)
- Is not (OR)
- Null
- Not Null



NOTE When specifying only a single row in your query:

- **Is (AND)** and **Is (OR)** return the same results.
- **Is not (AND)** and **Is not (OR)** return the same results.

The following examples uses the **Tests** class of the **RMDEMO** instance.

Is (AND)

When choosing the **Is (AND)** operator, a requirement is added to the result list if all values of the group attribute match all queried values.

Example:

- 1 Select the class **Tests**.
- 2 Add the attribute **Operating System**.
- 3 In the group attribute boxes, select **Desktop, Windows, XP**.
- 4 Click  .
- 5 In the group attribute boxes, select **Desktop, Windows, Vista**.
- 6 Click  .
- 7 In the group attribute boxes, select **Desktop, Windows, 7**.

8 Ensure that the box shows **Is (AND)**.

9 Click **Search**.

The result list contains requirements with the **Operating System** attribute having the combination of the following values: **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7**.

Is (OR)

When choosing the **Is (OR)** operator, a requirement is added to the result list if any of the values of the group attribute matches at least one of the queried values.

Example:

1 Select the class **Tests**.

2 Add the attribute **Operating System**.

3 In the group attribute boxes, select **Desktop, Windows, XP**.

4 Click  .

5 In the group attribute boxes, select **Desktop, Windows, Vista**.

6 Click  .

7 In the group attribute boxes, select **Desktop, Windows, 7**.

8 Ensure that the box shows **Is (OR)**.

9 Click **Search**.

The result list contains requirements that contain either **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7** (among other values) in its **Operating System** attribute.

Is not (AND)

When choosing the **Is not (AND)** operator, a requirement is added to the result list if the values of the group attribute do not match all of the queried values.

Example:

1 Select the class **Tests**.

2 Add the attribute **Operating System**.

3 In the group attribute boxes, select **Desktop, Windows, XP**.

4 Click  .

5 In the group attribute boxes, select **Desktop, Windows, Vista**.

6 Click  .

7 In the group attribute boxes, select **Desktop, Windows, 7**.

8 Ensure that the box shows **Is not (AND)**.

9 Click **Search**.

The result list contains requirements with the **Operating System** attribute **not** having the combination of the following values: **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7**.

Is not (OR)

When choosing the **Is not (OR)** operator, a requirement is added to the result list if the values of the group attribute do not match any of the queried values.

Example:

- 1** Select the class **Tests**.
- 2** Add the attribute **Operating System**.
- 3** In the group attribute boxes, select **Desktop, Windows, XP**.
- 4** Click  .
- 5** In the group attribute boxes, select **Desktop, Windows, Vista**.
- 6** Click  .
- 7** In the group attribute boxes, select **Desktop, Windows, 7**.
- 8** Ensure that the box shows **Is not (OR)**.
- 9** Click **Search**.

The result list contains requirements that contain neither **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7** in its **Operating System** attribute.

Null

When choosing the **Null** operator, a requirement is added to the result list if no group attribute value has been specified.

Not Null

When choosing the **Not Null** operator, a requirement is added to the result list if any group attribute value has been specified.

Using Search Filters

Search filters are saved Quick Search queries which allow you to quickly repeat queries you use frequently or you use with little modifications.

To use a previously saved search filter, do the following:

- 1** Open the list of search filters by clicking the little arrow of the search filter box. The search filter box is located left from the  button.
- 2** Select an entry from the list.

Saving Search Filters

Quick Search allows to save the search filter, so you can use it at a later time without having to select classes, attributes, or containers or enter search words.

To save a search filter, execute the following steps:

- 1 Click . This opens the **Enter filter name** dialog.
- 2 Type the name under which you want the filter to be saved.
- 3 Click **OK**. This saves the filter and closes the **Enter filter name** dialog.

Deleting Search Filters

If you do no longer require a search filter, you may want to delete it.

To delete a search filter, execute the following steps:

- 1 Open the list of search filters by clicking the little arrow of the search filter box. This opens the list with all search filters.
- 2 Move the mouse pointer over the search filter you want to delete. This highlights the search filter and a little "x" appears next to the search filter name.
- 3 Click the little "x" next to the search filter name. This opens the **Delete filter** dialog.
- 4 Click **OK**. This deletes the filter and closes the **Delete filter** dialog.

Refreshing Data

Click  to refresh the search.



NOTE Pressing the F5 key in RM Browser does not refresh the displayed data. This action instead brings the RM Browser page to its initial state.

Printing Requirements

You can print the contents of the Editable Grid or Grid views.



NOTE To print the Form view of a single requirement, see ["Printing a Requirement" on page 117](#).

To print a work page:

- 1 Select **Print to fit** from the items below **Category** on the Actions pane. A window opens with the content formatted for printing.
- 2 Your systems's Print dialog opens. Click **Print**. The content is sent to your printer.
- 3 After the content has printed, close the window of formatted content.

Exporting Requirements

For exporting requirements in the Hierarchy View, see chapter ["Exporting Requirements in the Hierarchy View" on page 101](#).

To export the requirements, follow these steps:

- 1** Click **Export As** from the items below **Category** on the **Action** pane.
- 2** Select the desired file format. These formats are available:
 - Excel Spreadsheet (*.xlsx)
 - Word Document (*.docx)
 - PDF Document (*.pdf)
 - XML Document (*.xml)
 - Web Page (*.html)
 - CSV (Comma delimited) (*.csv)
 - Plain Text (*.txt)
 - Plain Text Table (*.txt)
- 3** Click on one of these buttons:
 - **All Pages:** Exports all requirements
 - **Selected Page:** Exports the requirements of the currently selected page. If there are no pages, the result is identical with **All Pages**.



NOTE

- On the server, Microsoft Word is required to generate DOCX and PDF files. If Microsoft Word is not installed on the server, Microsoft Word documents are created with file extension .doc instead of a DOCX or PDF file. When opening a .doc file, you might receive a message that informs you that this file is in a different format than .doc. You can safely click **Yes** in this dialog box and the file will open in Word.
- If a .doc file is created, all links in the Table of Contents point to page number one. To correctly number the entries in the Table of Contents, right-click the Table of Contents and select **Update** in the context menu.
- When exporting *Test Case* or *Test Run* requirements (as defined for ["Test Case Management" on page 305](#)) to CSV format:
 - The Test Step columns will be split into these individual columns:
 - Test Steps - Description
 - Test Steps - Expected Result
 - Test Steps - Actual Result (only for *Test Run* requirements)
 - The Test Step number will not be exported.



CAUTION! When exporting *Test Case* or *Test Run* requirements (as defined for "Test Case Management" on page 305) to CSV format, you **must** include an ID column (PUID or object ID) if you want to re-import the CSV file. For further information about importing *Test Case* or *Test Run* requirements, see chapter "Importing Test Case and Test Run Requirements" on page 298.

Understanding a Saved XML Document

This section includes excerpts from an example XML document that is produced from the Save As XML command, and a table that describes the elements in the excerpts.

```

1 - <?xml version="1.0" encoding="iso-8859-1" ?>
2 - <REPORT name="Baseline Check" project="SPRINT5" user="EPHOTO"
3 -   xmlns="http://schemas.serena.com/rtm/2005">
4 - <SUBREPORT>
5 - <LAYOUT>
6 -   <COLUMN name="PUID" attrId="26" classId="1">PUID</COLUMN>
7 -   <COLUMN name="TEXT" attrId="31" classId="1">Baseline 1</COLUMN>
8 -   <COLUMN name="PUID" attrId="26" classId="1">PUID</COLUMN>
9 -   <COLUMN name="TEXT" attrId="31" classId="1">Baseline 2
10 -     Modifications</COLUMN>
11 - </LAYOUT>
12 - <SCHEMA>
13 - <CLASS name="MARKETING_REQUIREMENTS" id="1">
14 - <ATTRIBUTE name="PUID" id="26" type="puid" mandatory="false" editable="false"
15 -   unique="false" visible="true">
16 -   <FORMAT>MRKT_<#></FORMAT>
17 -   <DISPLAYNAME>Rqmt ID</DISPLAYNAME>
18 - </ATTRIBUTE>
19 - <ATTRIBUTE name="TEXT" id="31" type="text" mandatory="true" editable="true"
20 -   unique="false" visible="true">
21 -   <DEFAULTVALUE>Dummy Text</DEFAULTVALUE>
22 -   <DISPLAYNAME>Text</DISPLAYNAME>
23 - </ATTRIBUTE>
24 - </CLASS>
25 - </SCHEMA>
26 - <requirement class="MARKETING_REQUIREMENTS" id="1" version="1"
27 -   puid="MRKT_000001">
28 - <attribute id="PUID">MRKT_000001</attribute>
29 - <attribute id="TEXT">
30 -   This system shall enable the user to browse an on-line photo album. It
31 -   shall look and feel just like an electronic photo album.
32 - </attribute>
33 - <LINK name="Marketing_Requirements_CHANGE">
34 - <requirement class="MARKETING_REQUIREMENTS" id="8" version="1"
35 -   puid="MRKT_000001">
36 - <attribute id="PUID">MRKT_000001</attribute>
37 - <attribute id="TEXT">
38 -   shall look and feel just like an electronic photo album.
39 - </attribute>
40 - </LINK>
41 - <requirement class="MARKETING_REQUIREMENTS" id="8" version="1"
42 -   puid="MRKT_000001">
43 - <attribute id="PUID">MRKT_000001</attribute>
44 - <attribute id="TEXT">
45 -   The ePhoto system shall enable the user to browse an on-line photo
46 -   album. It shall look and feel just like an electronic photo album, just
47 -   like the one on the coffee table.
48 - </attribute>
49 - </requirement>
50 - <requirement class="MARKETING_REQUIREMENTS" id="42" version="1"
51 -   puid="MRKT_000001">
52 - <attribute id="PUID">MRKT_000001</attribute>
53 - <attribute id="TEXT">
54 -   The ePhoto system shall enable the user to browse an on-line photo
55 -   album. It shall look and feel just like an electronic photo album, just
56 -   like the one on the coffee table.
57 - </attribute>
58 - </requirement>
59 - </LINK>
60 - </requirement>
61 - <requirement class="MARKETING_REQUIREMENTS" id="2" version="1"
62 -   puid="MRKT_000002">
63 - <attribute id="PUID">MRKT_000002</attribute>

```

```

</attribute>
</requirement>
</SUBREPORT>
<SCRIPT>
- <![CDATA[
select <PUID>PUID <Baseline 1>TEXT from Marketing_Requirements where
group in ('Baseline 1') and STATUS != 'Deleted'

xref source secondary_history

select <PUID>PUID <Baseline 2 Modifications>TEXT from
Marketing_Requirements where group in ('Baseline 2')

plus

select <PUID>PUID <Baseline 2 Additions>TEXT from
Marketing_Requirements where group in ('Baseline 2') and group not
in ('Baseline 1') and NOT_SECONDARY_IN immediate

plus

select <PUID>PUID <Baseline 1 Deletions>TEXT from
Marketing_Requirements where group in ('Baseline 1') and
STATUS='Deleted'
]]>
</SCRIPT>
</REPORT>

```

The following table describes the elements in the preceding excerpts. Note the following terms:

- **Tags** are enclosed by < > brackets.
- **Attributes** are anything of type name=value within a tag.
- **Content** is any plain text between opening and closing tags.

Key	Description
①	<REPORT> is the root tag in the XML document. It has attributes for the query name, the instance name, and the user who performed the query.
②	A PLUS statement in a query can be used to join multiple scripts into one script. The outcome of the resulting script is multiple reports produced in one data extraction run. If a PLUS report is run, there are additional <SUBREPORT> tags for each subreport.
③	Each <REPORT> or <SUBREPORT> tag contains a <LAYOUT> tag that describes the mapping from the Dimensions RM attribute names and the display names to be used in a report.
④	The <SCHEMA> tag contains the classes used in the query and more details about the attributes involved. NOTE: The <LAYOUT> tag may define the same attribute more than once, but the <SCHEMA> tag displays the attribute only once.
⑤	The <CLASS> tag is created for each requirement that is returned from the query. The content of the tag is the class name and the class ID.
⑥	Each <ATTRIBUTE> tag has attributes for name, ID, and type; and mandatory, editable, unique, and visible flags. For each RM attribute of type "puid," "alphanumeric," or "date," a <FORMAT> tag is created. The attribute type determines the attributes of the <FORMAT> tag. For each Dimensions RM attribute of type "list," a <LISTVALUES> tag is created that lists the valid values for the attribute.

Key	Description
7	For each Dimensions RM requirement returned from the query, a tag is created that matches the Dimensions RM class name (for example, <requirement class>) and that contains the requirement ID. Each requirement tag then contains the attributes requested in the query (see element number 8).
8	For each Dimensions RM attribute requested in the query for a particular requirement, a tag is created that matches the Dimensions RM attribute name (for example, <TEXT>). The content of the tag is the value of the Dimensions RM attribute.
9	The XREF statement in a query allows you to show the linkage or traceability between requirements. If an XREF report is run, the relationships are shown as nested <LINK> tags. The "name" attribute is the name of a Dimensions RM relationship. The <LINK> tag contains tags for the related requirements. There may be more than one <LINK> tag at the same level to indicate multiple links to the same requirement. The same requirement may appear more than once in the XML output because of different relationships to the same requirement.
10	The last tag in the report is the <SCRIPT> tag. The content of the tag is the query string used for the query. Because it may contain incompatible XML text, it is wrapped in a [!CDATA] block to preserve all text.

Exporting Requirements in the Hierarchy View



TIP Before starting exporting requirements, select the category you wish to export in the Category View. Then switch to Hierarchy View.

To export requirements from the Hierarchy View:

- 1 Change to the Hierarchy View.
- 2 In the **Hierarchy** set of the **Actions** pane, click **Export**.
- 3 Select the desired export options.
- 4 Click **Export**.



NOTE On the server, Microsoft Excel is required to generate XLSX files. If Microsoft Excel is not installed on the server, Microsoft Excel spreadsheets are created with file extension .xls instead. When opening an .xls file, you might receive a message informing you that this file is in a different format than .xls. You can safely click **Yes** in this dialog box and the file will open in Excel.

Explaining Update and Delete Functions

Dimensions RM allows you to modify requirements in several fundamentally different ways. It is critical to understand the difference between these options:

- **Replace** creates a new version while maintaining a history of changes. This allows you to trace change to a requirement over time. This is the recommended method for changing requirements to ensure auditability.

- **Update** overwrites the content of the requirement version without maintaining a record of what was changed. This option is not recommended if you need to maintain a history, or audit trail, of changes to requirements over time. A Trend report for example requires the history information to calculate the trend. All other attributes, including Current Status, remain intact.
- **Delete** marks the requirement as deleted and makes it unavailable for modification. However, it remains in the database and can be undeleted later on. By default, deleted requirements are not visible; however, you can query for them.
- **Remove** removes the current version of a requirement from the database and makes the previous version current. Unlike Delete, a removed requirement cannot be restored.
- **Undelete** restores a requirement which has been deleted with the Delete function.

Using the Action Shortcuts

The title pane provides some shortcuts for common functions and is located at the top of the **Edit Attributes** dialog.

The following actions are available:

Action	Description
	Allows to subscribe or unsubscribe e-mail notification for changes of the requirement.
	Reloads the current dialog. Reloading a new requirement means that you will lose your entered or selected data.
	Opens the printable view and the Print dialog from which you can select a printer.
	Opens the online help.

Using the Actions Box

The **Actions** box provides a shortcut to other functions and is located in the top right corner of the **Edit Attributes** dialog. To use the **Actions** box, open an existing requirement or create a new requirement. Note that some actions may not be available when creating or editing a requirement.

The following actions are available:

Action	Description
Link	Opens the Link Requirements dialog. For further information, see chapter " Linking an Existing Requirement " on page 122.
Create New & Link	Opens the New & Link dialog to create a new requirement and link it with the existing requirement.
Browse Links	Opens the Link Browser dialog. For further information, see chapter " Using Link Browser " on page 133.

Action	Description
Add Comment	Puts the requirement into Add a Comment mode (same as clicking Start a new discussion in the Comments section). For further information about comments, see chapter " Participating in Discussions " on page 165.
Propose New	Allows to create a new change request based on the current class in the New requirement dialog. For further information about creating a new change request, see chapter " Proposing a New Requirement " on page 112.
Propose Changes	Allows to create a change request based on the current requirement and links it to the requirement. For further information about creating change requests, see chapter " Submitting a Change Request " on page 119.
Add to Containers	Opens the Add to Containers dialog to add the current requirement to a container. For further information about containers see chapter " Working with Containers " on page 137.
Show direct URL	Opens the Requirement Link dialog which shows the link to the current requirement.
Clear content	Clears all editable attributes of a requirement.
Refresh	Reloads the current dialog. Reloading a new requirement means that you will lose your entered or selected data.
Print	Opens the printable view and the Print dialog from which you can select a printer.
Class Information	Opens the Class Information dialog that provides details about attributes and Workflow states and transitions (if the class uses a Workflow). For further information, see chapter " Viewing Information about a Class " on page 103.
Help	Opens the online help.

Viewing Information about a Class

When entering data into the form or dealing with a workflow, there might be situations where the information provided by the form may not describe the required action clearly enough.

To view the class information, follow these steps:

- 1 Open a requirement or create a new requirement of the desired class.
- 2 At the top of the window, open the **Actions** box and select **Class Information**. This opens the **Information about class: Class Name** dialog.

The **Information about class** dialog provides these informations:

- Class description
- Workflow diagram (if class uses a workflow)
- State descriptions
- Transition descriptions
- Custom attribute descriptions

- System attribute descriptions

About Requirement Versions

When replacing a requirement, a new version of the requirement is created. These versions allow to follow the requirement history as you can open a previous version of a requirement and compare it with any other requirement version. For further information about a requirement's history, see chapter "[Viewing Requirement History](#)" on page 143. To subscribe a notification e-mail you receive when a specific requirement changes, see chapter "[Following Requirement Changes](#)" on page 104.

To inform you that the requirement you opened is not the current version, a warning message is shown in the **Edit Attributes** dialog. This warning message disappears after 5 seconds. Then, you can click the **Edit Current Version** link which loads the current version of the requirement.

Following Requirement Changes

For some requirements, it may be useful to receive a notification e-mail when this requirement changes. The title and text of the notification e-mail can be configured by your administrator (see chapter "[Follow Settings](#)" on page 89).



IMPORTANT! The notification e-mails generated will only be sent if the Micro Focus Mail Service has been configured and is running. For further information on Mail Service configuration, see chapter "*RM Mail Service*" in the *Dimensions RM Administrator's Guide*.

Subscribing a Requirement Change Notification

To subscribe the requirement change notification e-mail, do the following:

- 1 Selecting the desired requirement in a work pane.
- 2 Select **Edit** from the **Requirements** set of the **Actions** pane. This opens the **Edit Attributes** dialog.
- 3 In the title pane, click . This opens the **Follower** popover. The list contains the users who subscribed notification e-mails for this requirement.
- 4 Click **Follow**.

Unsubscribing a Requirement Change Notification

To unsubscribe the requirement change notification e-mail, do the following:

- 1 Selecting the desired requirement in a work pane.
- 2 Select **Edit** from the **Requirements** set of the **Actions** pane. This opens the **Edit Attributes** dialog.
- 3 In the title pane, click . This opens the **Follower** popover. The list contains the users who subscribed notification e-mails for this requirement.

4 Click **Unfollow**.

About Requirement Locks



NOTE RM Browser can be configured to use locking or merging to handle the situation when multiple users want to edit a requirement or chapter at the same time. This section describes the locking mechanism. See ["Merging Requirement Changes" on page 150](#).

This configuration is set through the Instance Settings dialog, which is available only to administrators. For further information, see chapter ["Concurrent Editing" on page 77](#).

Requirements and chapters (including the "root chapter" of a document, which is the document itself) are locked persistently when you open the respective "edit" dialog box. When a requirement or chapter is locked, a lock icon is displayed in the dialog box banner, and other users cannot edit the requirement or chapter.

The lock icon is displayed in the following scenarios:

- The current user locked the requirement.
- Another user locked the requirement.
- The requirement is CM locked.
- The requirement is baselined.

In the last three scenarios, the user receives a warning message about the lock. A tooltip, which is displayed when you hover over the icon, indicates the reason the requirement is locked.

Locks are removed when one of the following occurs:

- You close the dialog.
- You save changes.
- You use the Administer Locks dialog to remove locks (see ["Managing Requirement Locks" on page 346](#)). Users can unlock the requirements or chapters they locked; users with *Unlock* permission can unlock requirements or chapters that others locked.
- An administrator uses RM Manage to grant the Unlock permission to users. For information about granting permissions, see the *Dimensions RM Administrator's Guide*.

Workflows

For a requirement class, the administrator can define a workflow. A workflow ensures the proper flow of requirements using a defined process that consists of attributes, states and transitions. Requirements must follow this workflow from the time they are submitted.

Workflow Elements

A workflow consists of two elements: states and transitions.

State: A state is a position in a workflow where a requirement resides. While a requirement resides in a given state, it has an owner who is responsible for performing a

specific task with the requirement before it can be transitioned to the next state. You can review all previous states of a requirement in the **State History** section.



Figure 3-1. State History

Transition: A transition activates the movement of a requirement from one state to another in the workflow. A user who has ownership of a requirement transitions the item to the next state in the workflow when the corresponding task is finished. To execute a transition, click the button with the desired transition name. You find these buttons on top of the **Edit Attributes** dialog for a requirement.



Figure 3-2. Transitions Return, Approve and Reject

Details: Clicking **Details** (at the bottom of the transition info), opens the transition details dialog.

Details		
Attribute	Prior Value	New Value
Text	The system shall make use of multiple monitors.	The system shall make use of multiple monitors. The system shall save the monitor dimensions and locations and recognize them when started.
Workflow State	In Analysis	In Review
Owner	Eric T. O'Brien	Alexis Grosby
File Attachment		Diagram.jpg
Manager	Ryan Forbes	Alexis Grosby
Status Log		Moved to review

Figure 3-3. Transition Details Dialog

You can open the **History Differences** dialog by clicking  which is located in the title bar of the transition details dialog.

Transitioning Requirements to a different Workflow State

Each transition allows to show a dialog which must be completed for completion of the transition. If this is not required, the administrator can configure the transition that no dialog is shown. In this case, the transition completes immediately. If configured by your administrator, transitions can execute automatically. In this case Dimensions RM will not show any button for that transition. The following sections describe how to execute transitions manually.

Transitioning Requirements with Electronic Signatures

When transitioning a requirement to a different workflow state it may be required to legally ensure that the person who is recorded in the database is the person he or she appears to be. This is done through an electronic signature. When transitioning a requirement and electronic signature has been enabled for the transition, the user has to confirm his identity by typing his or her password. If a transition with electronic signature which was executed successfully, it is marked . The **Details** dialog for that transition shows which user digitally signed the transaction step as shown by the image below.

Details		
Signature: Joseph Wilson (JOE), 15-JUN-2020@15:19:10, Approve		
Attribute	Prior Value	New Value
Workflow State	In Review	Approved
Owner	Henry Miller	Joseph Wilson

Transitioning a Single Requirement to a different Workflow State

To transition a single requirement, do the following:

- 1 Open the **Edit Attributes** dialog for the requirement. For further information on how to edit a requirement, see chapter "[Editing a Requirement](#)" on page 114.
- 2 Click the desired transition button which is at the top of the dialog.



NOTES

- If attribute constraints or relationship constraints have been defined on a transition, the transition will only show if it matches the constraints.
- Relationship constraints that have been defined on a transition are different from relationship constraints that have been defined on class level.

Transitioning Several Requirements to a different Workflow State

To transition several requirements, do the following:

- 1 Perform a search in Quick Search to find the requirements you want to transition. For further information on how to find requirements, see chapter "[Finding Requirements with Quick Search](#)" on page 92.
- 2 Select the requirements you want to transition.

- 3 Click **Execute Transition** in the Requirements set of the Actions pane. This opens the Execute Transition for **Multiple Requirements** dialog.
- 4 Select the desired transition from the **Transition** box.
- 5 Click **OK**.
If the transition is a regular transition, this opens a dialog for editing the attribute values of the requirement(s). Continue with step [Step 6](#).
If the transition is a quick transition (which shows no form) this starts execution of the transition: Continue with [Step 8](#).
- 6 Fill out the fields of that dialog.



NOTE

- If multiple requirements are transitioned, the values specified will be used for all requirements..
- Empty attribute values (or lists without a selected value) do not reset the values, but does not change the attribute values of the requirement(s).

- 7 Click **OK** to start execution of the transition.
- 8 When the process has completed, the **Transition Result** dialog opens. To view the IDs of the transitioned requirements, expand the result list by clicking .

Copying the URL of a Requirement to the Clipboard

You can copy the URL of a requirement and paste it into a file for future use and reference. When that URL is later invoked, it will open RM Browser to that requirement.

You can copy a URL that will always lead to the most current version of the requirement, or you can copy a URL to a specific version of the requirement. See the appropriate section below.

Copying the URL of the Latest Version of a Requirement

To copy the URL of the latest version of a requirement:

- 1 Open the requirement for editing. See ["Editing a Requirement" on page 114](#).
- 2 Expand the **System Attributes** section of the Edit Attributes dialog.
- 3 Right-click on the URL labeled as the **Requirement Link**.
- 4 Select **Copy Shortcut** (or a similar menu item, depending upon the browser you are using).

The URL is now on the Windows clipboard. You can now paste it into the file in which you wish to keep it.

Copying the URL of a Specific Version of a Requirement

To copy the URL of a specific version of a requirement:

- 1 Open the requirement for editing. See ["Editing a Requirement" on page 114](#).

- Expand the **History** section of the Edit Attributes dialog.

TIME MODIFIED	MODIFIED BY	CURRENT STATUS
18-MAY-2006@08:59:35	Ryan Forbes	Replaced (Baselined)
30-SEP-2015@01:41:48	Ryan Forbes	Current

- Right-click the link  icon next to the version that you want.
- Select **Copy Shortcut** (or a similar menu item, depending upon the browser you are using).

The URL is now on the Windows clipboard. You can now paste it into the file in which you wish to keep it.

Working with the Hierarchy View

In general, you might use collections or documents to structure requirements. If this is not desired, you can use the Hierarchy View for structuring requirements. The Hierarchy View is available in the category tree of the Home View. To switch to the Hierarchy View, click .

As a default, the Hierarchy View shows all requirements of a category as a simple list for that category. By dragging requirements and dropping them on other requirements, these dropped requirement will become a child of the requirement it dropped on.



NOTE

- Dropping a requirement onto another requirement **does not** link the two requirements.
- The structure is the same for all users.

To export requirements from the Hierarchy View, see chapter "[Exporting Requirements in the Hierarchy View](#)" on page 101.

To change the displayed or exported columns, see chapter "[Hierarchy Settings](#)" on page 82.

Working with Requirements and Change Requests

When creating, editing, or viewing a requirement or change request, on top of the dialog, you will find the names of the sections which you find in the dialog.

[ALL](#) STANDARD CUSTOM SYSTEM ATTACHMENTS COMMENTS LINKS HISTORY POLLS CONTAINERS

Clicking a section name will show only the attributes of that section, which improves the overview. To restore the original view, click **All**.

Creating a New Requirement

You can create a new requirement if you have **Create** permission for the class to which the requirement belongs. If you do not have **Create** permission, but you do have **CreateCR** permission, you can submit a change request for the new requirement. See ["Proposing a New Requirement" on page 112](#).



TIP If you are using Firefox, you can enable the Firefox spell-check feature. Consult Firefox online help for more information.

To create a new requirement:

- 1 Select **Requirement** from the **New** menu. The **New** dialog opens.
- 2 **Class:** Select the class to which the new requirement will belong. This list includes all of the classes for which you have "create" or "submit" permission.



NOTE

- If a requirement was selected or open when you invoked the dialog, the dialog opens with a class already selected.
- If you invoked the New dialog by clicking the **Create New and Link** button in the **Links** section of the Edit Attributes dialog, you cannot change the class selection.
- If you use Agile and want to create a new product, it is strongly suggested, to create the product with the function Agile provides (see chapter ["Adding Products" on page 324](#)). To use an existing product with agile, see chapter ["Manual Product Assignment" on page 325](#).

- 3 **Category:** Select the category to which the new requirement will belong.
- 4 **Attributes:** Complete the fields in the attributes sections, as needed. Attributes that are incomplete or incorrect are flagged with a red exclamation mark (❗). A green check mark (✅) indicates that the value is acceptable. To view a tip as to what values are acceptable, hover over the attribute's exclamation mark or check mark.



NOTE

- **Group Attributes:** If this section appears, the requirement class has been defined to include one or more group attributes. See ["Working with Group Attributes" on page 142](#).
- **Applying HTML Formatting:** If a text attribute can accept HTML formatting, a text formatting tool bar appears when you click in the attribute's field. See ["HTML Text Formatting Toolbar" on page 36](#).

- 5 **File Attachments:** To attach a file to the requirement, expand this section and click **Attach**. The Add Attachment dialog opens. Enter the full path to the file or click **Browse** to locate the file, and then click the **OK** button.
- 6 **Container:** To add the new requirement to a collection, expand this section and click one of the following buttons:
 - **+ Create New Container & Add** to create a new Collection and add the new requirement to it. The Add to Containers - New Collection dialog opens. See

"Creating a New Collection" on page 273, but ignore the **Based on** section as that does not apply to this invocation of the dialog.

-  **Add to Containers** to add the new requirement to an existing collection. The Add to Containers dialog opens. Select the desired collection or collections and click the **OK** button.
- 7 **Add as subrequirement:** (only appears if the New dialog was invoked from a document) If you invoked the dialog while a requirement was selected in a document, select this checkbox to add the new requirement as a subrequirement of the selected requirement; or deselect this checkbox to add the new requirement to the parent chapter of the selected requirement. If a requirement was not selected when you invoked the dialog, this checkbox does not appear, and the new requirement is added to whatever element was selected in the document tree.
 - 8 **Close after save:** Select this check-box to close the requirement after saving it. Otherwise, the requirement opens for editing after you save it.
 - 9 Click one of the following buttons:
 - **Save** to create the new requirement and close the New dialog. The requirement opens for editing if the **Close after save** checkbox is not selected. See "Editing a Requirement" on page 114.
 - **Save & Copy** to create the new requirement and retain the attribute values for creating another new requirement.



NOTE An attribute is copied into the next requirement only if the administrator selected the **Populate On Copy** option when defining the attribute. See the *Administrator's Guide*.

- **Save & New** to create the new requirement and clear the attribute values for creating another new requirement.

Mass Creating Requirements

Dimensions RM allows creating large numbers of requirements which are linked to a base requirement. This may be the case when you use Test Case Management and want to create Test Runs for Test Cases. Note that mass creation of requirements is only available for classes which allow linking.

Mass Creating Requirements in Quick Search

To mass create requirements, do the following:

- 1 Select one or several requirements, i.e. in Quick Search result, a report result, or in a document. For information on finding requirements, see chapter "Finding Requirements with Quick Search" on page 92.
- 2 From the **Requirements** set of the **Actions** pane, click **Create New & Link**. This opens the **Mass Create New & Link** dialog.
- 3 From the **Create New Requirement for** box, select the class for the new requirements.
- 4 Click **Next >**.

- 5 If desired, specify a prefix in the **Prefix for Title** box. The prefix will be used with the title attribute of the new requirements and allows to locate the requirements more easily.
- 6 Fill out any attributes and/or change the category as desired or required.
- 7 Click **Save**. This starts creation and linking of the requirements. When the process is complete, the **Created** dialog opens. This dialog contains a table with the original requirement and the created requirement. By clicking the ID of a requirement, you can open it for editing (see ["Editing a Requirement" on page 114](#)).
- 8 Click **Close**.

Mass Creating Requirements for Collections

To mass create requirements, do the following:

- 1 Select a collection on the collections tab of the Home View. For information on the Home View, see chapter ["Working with the Home View" on page 227](#).
- 2 In the **Requirements** set of the **Actions** pane, click **Create New & Link**. This opens the **Mass Create New & Link** dialog.
- 3 From the **Base Class** box, select the class which should receive the created and linked requirements.
- 4 From the **Create New Requirement for** box, select the class for the new requirements.
- 5 Click **Next >**.
- 6 If desired, specify a prefix in the **Prefix for Title** box. The prefix will be used with the title attribute of the new requirements and allows to locate the requirements more easily.
- 7 Fill out any attributes and/or change the category as desired or required.
- 8 By default, the **Add to collection <Collection Name>** box is selected. If the box selected, the new requirements will be added to the original collection. If the box is cleared, the new requirements will not be added to any collection.
- 9 Click **Save**. This starts creation and linking of the requirements. When the process is complete, the **Created** dialog opens. This dialog contains a table with the original requirement and the created requirement. By clicking the ID of a requirement, you can open it for editing (see ["Editing a Requirement" on page 114](#)).
- 10 Click **Close**.

Proposing a New Requirement

If you have permission to submit change requests (CreateCR), you can propose a new requirement. This is true even if you do not have permission to create new requirements. In doing so, you can specify the desired attributes for the new requirement.

To propose a new requirement:

- 1 Do one of the following:

- Select **Propose New** from the **Requirements** set of the Actions pane. The *Propose New Requirement* dialog opens. Then, select the class to which the new requirement will belong from the **Class** box. This list includes all of the classes for which you have **create** or **submit** permission.



NOTE If a requirement was selected or open when you invoked the dialog, the dialog opens with a class already selected.

- From the **New** menu, in the menu bar, select the class for which you want to create the change request. This opens the dialog for creating a new requirement. Then, select **Propose New** from the **Actions** drop down list.
- 2 Category:** Select the category to which the new requirement will belong.
 - 3 Attributes:** Complete the fields in the attributes sections, as needed. Attributes that are incomplete or incorrect are flagged with a red exclamation mark (❗). A green check mark (✅) indicates that the value is acceptable. To view a tip as to what values are acceptable, hover over the attribute's exclamation mark or check mark.



NOTE

- **Group Attributes:** If this section appears, the requirement class has been defined to include one or more group attributes. See "[Working with Group Attributes](#)" on page 142.
- **Applying HTML Formatting:** If a text attribute can accept HTML formatting, a text formatting tool bar appears when you click in the attribute's field. See "[HTML Text Formatting Toolbar](#)" on page 36.

- 4 File Attachments:** To attach a file to the requirement, expand this section and click **Attach**. The Add Attachment dialog opens. Enter the full path to the file or click **Browse** to locate the file, and then click the **OK** button.
- 5 Reason for change:** Enter the reason you want to create a new requirement.
- 6 ECP:** If you want to link the new requirement to an ECP class object, select the desired ECP from the list. If no ECPs have been defined, the list does not appear.



NOTE ECPs are a high-level change management class type (Engineering Change Proposal) that can be used to collect multiple change requests into a single package.

- 7 Add change request to the document:** If you invoked the dialog from a Document work page, you have the option of adding the change request to that document.
- 8 Close after save:** Select this check-box to close the change request after saving it. Otherwise, the requirement opens for editing after you save it.
- 9** Click one of the following buttons:
 - **Submit** to submit the change request and close the dialog.
 - **Submit & Next** to submit the change request and keep the dialog open for submitting another change request.



NOTE When creating a new proposal, links and collections are inherited from the original requirement. For further information, see chapters "[Inherited Links](#)" on page 132 and "[Inherited Containers](#)" on page 138.

Editing a Requirement

This section describes using the Edit Attributes dialog to edit an existing requirement.



TIP Some attributes can be directly edited in the Editable Grid view. In this view, it is possible to edit an attribute across multiple requirements at once. See "[Editable Grid, Grid, and Form Views](#)" on page 29.

To edit a requirement:

- 1 After selecting the desired requirement in a work pane, select **Edit** from the Requirements set of the Actions pane. The **Edit Attributes** dialog opens.
- 2 **Category:** Click the arrow next to the category to select a different category.
- 3 **Attributes:** Complete the fields in the attributes sections, as needed. Attributes that are incomplete or incorrect are flagged with a red exclamation mark (❗). A green check mark (✅) indicates that the value is acceptable. To view a tip as to what values are acceptable, hover over the attribute's exclamation mark or check mark.



NOTES

- **List Attributes:** If an entry in a list appears in a different color, this entry has been deleted and cannot be selected.
 - **Group Attributes:** If this section appears, the requirement class has been defined to include one or more group attributes. See "[Working with Group Attributes](#)" on page 142.
 - **User Attributes:** If a user attribute shows a user name with a link, you can open a popup window with the user information (e.g. full name, e-mail address, phone number) by clicking that link. Note that only those data will be available which have been entered upon user creation. If the user attribute shows a group name, the popup shows the users of the group.
 - **Applying HTML Formatting:** If a text attribute can accept HTML formatting, a text formatting tool bar appears when you click in the attribute's field. See "[HTML Text Formatting Toolbar](#)" on page 36.
- 4 **File Attachments:** To attach a file to, or remove a file from, the requirement, expand this section. See "[Working with File Attachments](#)" on page 140.
 - 5 **Comments:** To view comments associated with the requirement or participate in or start a discussion, expand this section. See "[Participating in Discussions](#)" on page 165.
 - 6 **Container:** To add/remove the requirement to/from a collection, expand the Container section. See chapter "[Working with Containers](#)" on page 137.

- 7 **Links:** To add links to or remove links from the requirement, edit linked requirements, clear suspect links, and select which attributes to display in the section, expand this section. See ["Working with Links" on page 121](#).



NOTE Any linked objects displayed here are the current version of the object. See the Container section for object links specific to the version in a container.

- 8 **Dimensions CM:** This section displays Dimensions CM projects and requests that are associated with this requirement.
- 9 **History:** This section displays information such as the date and time the requirement was modified, who modified it, and its status.
- 10 **Polls:** To create a poll associated with the requirement, modify an existing poll, vote in a poll, or view poll results, expand this section. See ["Polling" on page 161](#).
- 11 **Link Attributes:** The **Link Attributes** section is only visible if you create a new requirement or change request and linking it to a requirement. For details, see ["Editing Link Attributes" on page 128](#).
- 12 **Show navigation bar / Hide navigation bar:** Click to show/hide the navigation bar at the bottom of the dialog. You can browse through the requirements in sequence with the **First**, **Previous**, **Next**, and **Last** controls.
- 13 **Close after save:** Select this check-box to close the requirement after saving it. Otherwise, the requirement opens for editing after you save it. **Close after save** is not available if the navigation bar is visible.
- 14 Click one of the following buttons:
- **Copy** to copy the attribute values for use in creating a new requirement. If the user does not have the **Create** right but the **CreateCR** right for classes, a proposal will be created instead. The New *ClassName* dialog opens (see ["Creating a New Requirement" on page 110](#)).



NOTE An attribute is copied into the next requirement only if the administrator selected the **Populate On Copy** option when defining the attribute. See the *Administrator's Guide*.

- **Copy with Links** As above, but includes links to other requirements.
 - **Update** to close the dialog and save your changes without creating a new version of the requirement. (This option is not recommended if you need to maintain a history, or audit trail, of changes to requirements over time.) The requirement remains open for editing if the **Close after save** checkbox is not selected.
- Update & Next:** As above, except the dialog remains open and the next requirement is loaded. This version of the button appears when the Navigation Bar is visible.
- **Replace** to close the dialog and save your changes as a new version of the requirement. The requirement remains open for editing if the **Close after save** checkbox is not selected. Depending on your configuration, replacing a requirement may trigger the **Clear Suspect for** dialog (see ["Clearing Suspect Links When Replacing a Requirement" on page 131](#)).
 - **Replace & Next:** As above, except the dialog remains open and the next requirement is loaded. This version of the button appears when the Navigation Bar is visible. Depending on your configuration, replacing a requirement may trigger

the **Clear Suspect for** dialog (see ["Clearing Suspect Links When Replacing a Requirement" on page 131](#)).



NOTE If the requirement is in an ECP-controlled document that you have not assigned an ECP to, and **Update to Current (Tip)** is in effect, the action will be halted and you will receive a message upon clicking the **Replace** or **Replace & Next** button. See ["Merging Document Changes" on page 193](#).

Copying a Requirement

If you want to create a new requirement which is mostly identical to an existing requirement, you can copy that existing requirement and modify it before you submit it. You can create a new requirement if you have **Create** permission for the class to which the requirement belongs. If you do not have **Create** permission, but you do have **CreateCR** permission, you can propose a new requirement with the Copy function.

You can use the Copy function at these locations:

- In the **Edit Attributes** dialog by using the **Copy** or **Copy with Links** buttons.
- In the **Actions** pane by selecting a requirement. You can select requirements in these views:
 - **Requirements** View
 - **Document** View

Using the Expand Feature

Expand allows a requirement to be "branched" such that the original requirement is locked, while one or more new requirements are created with the linkage to the parent displayed in the **Pedigree View** (see chapter ["Using Pedigree View" on page 148](#)).

To expand a requirement:

- 1 In **Requirements View**, select one or several requirements with object status **Current** or **Expanded**.
- 2 Click **Expand** in the **Requirements** set of the **Actions** pane. This opens the **New Class Name** dialog.
- 3 Make modifications as desired.
- 4 Click **Save**.



NOTE Expanding a requirement sets the object status of the original requirement to **Expanded**. The new requirement has the object status **Current**.

Deleting a Requirement

When you delete a requirement, it is marked as deleted, but the data is retained. You can delete requirements whose state is "Current" if you have "Delete" permission for its class. When you delete a requirement, a new version is created to ensure that a full audit trail of the requirement's deletion is maintained.

To delete a requirement:

- 1 Select one or several requirements in a work pane.
- 2 Select **Delete** from the **Requirements** set of the **Actions** pane.
- 3 Click **OK** to confirm the operation.

Undeleting a Requirement

When you delete a requirement, it is marked as deleted, but the data is retained. When you undelete a requirement, a new version replaces the previous version to ensure that a full audit trail of the requirement's deletion is maintained.

To undelete a requirement:

- 1 Select one or several requirements in a work pane.
- 2 Select **Undelete** from the **Requirements** set of the **Actions** pane.
- 3 Click **OK** to confirm the operation.

Removing a Requirement Version

When you remove a requirement, the selected version is permanently removed from the instance, and the previous version is made current. You can remove requirements whose state is "Current" if you have "Remove" permission for its class.



CAUTION! A remove operation cannot be undone.

To remove a requirement:

- 1 Select one or several requirements in a work pane.
- 2 Select **Remove** from the **Requirements** set of the **Actions** pane.
- 3 Click **OK** to confirm the operation.

Printing a Requirement

You can print a requirement from the **Edit Attributes** dialog box.

To print a requirement:

- 1 After selecting the desired requirement in a work pane, select **Edit** from the Requirements set of the Actions pane. The Edit Attributes dialog opens.
- 2 You must expand sections and sub-sections if you wish to print their contents.
- 3  Click the **Print** button at the top right of the dialog box. A window opens with content formatted for printing; the RM controls shown in this window are non-functional.
- 4 Your system's Print dialog opens. Click **Print**. The requirement is sent to your printer.
- 5 After the content has printed, close the window that displayed the formatted content.

Changing the Class of a Requirement

At times it may be necessary to change the class of a requirement, e.g. because it was accidentally created with the wrong class. By using the **Change Class** function, this can be done easily and the change appears in the requirement's history, which may be important for audit trails.

To change the class of a requirement, do the following:

- 1 Select one or several requirements, i.e. in Quick Search result, a report result, or in a document.
- 2 Click **Change Class** in the **Requirements** set of the **Actions** pane. This opens the **Change Class** dialog.
- 3 From the **New Class** box, select the class you want to convert the requirement to. If you selected several requirements, all requirements will be converted into the selected class.
- 4 Click **Next**.
- 5 Fill out any attributes and/or change the category as desired or required.
- 6 Click **Save**. This opens the **Changed** dialog which gives you an overview about the changed requirements. By clicking the left ID link (the name depends on the original class) of a requirement, you open the original version. By clicking the **New ID** link the current requirement version opens for editing. For further information about editing requirements, see chapter ["Editing a Requirement" on page 114](#).
- 7 Click **Close**.



NOTE

- The corresponding Title and Text attributes (the names depend on the related classes) are transferred automatically.
- If the Workflow feature is enabled for the target class, after class conversion, the requirement will always be in the state following the **New** transition.

8

Viewing the Requirements in a Category, Document, Report, Collection, or Baseline

To view the list of requirements in a specific item:

- 1 Open the Home View by clicking .
- 2 To view the requirements in a:
 - **Category or sub-category**, select the desired categories in the Category pane. Then click **View Requirements** from the Category set of the Action pane.
 - **Document or snapshot**, double-click the desired document or snapshot in the Documents tab of the selection pane.
 - **Report**, double-click the desired report in the Reports tab of the selection pane.

- **Collection**, double-click the desired collection in the Collections tab of the selection pane.
- **Baseline**, double-click the desired baseline in the Baselines tab of the selection pane.

Submitting a Change Request

To submit a change request, you must have "CreateCR" permission for classes.



NOTE To submit a change request that proposes the creation of a new requirement, see ["Proposing a New Requirement" on page 112](#).

To submit a change request for a requirement:

- 1 After selecting the desired requirement in a work pane, select **Propose Change** from the **Requirements** set of the Actions pane. The **Propose a Change** dialog opens.
- 2 Change the attributes in the attributes sections as desired. Changes are marked by .
- 3 In the **Reason for change** box, type the justification for the change request. There is no practical limit to the number of characters. The HTML editing control is not available in the **Reason for change** field.
- 4 If you want to link the change request to an Engineering Change Proposal (ECP) class object, select the object in the **ECP** list. The **ECP** list box does not appear if no ECPs have been defined.
- 5 **Exchange in:** If the request was submitted from a document, you can select this checkbox to replace the version in the document with the new version.
- 6 **Close after save:** Select this check-box to close the change request after saving it. Otherwise, the change request opens for editing after you save it. **Close after save** is not available if the navigation bar is visible.
- 7 Do one of the following:
 - Click **Submit** to submit the change request. The change request opens for editing if the **Close after save** checkbox is not selected.
 - Click **Submit & Next** to submit the change request and then load the next requirement in the query results.



NOTE

- The labels on the buttons vary depending on whether the navigation bar is shown or hidden. If it is shown, **Submit & Next** appears. If it is hidden, **Submit** appears.
- You can also submit a change request for a new requirement from the **New Change Request** dialog box. For more information, see ["Proposing a New Requirement" on page 112](#).

- 8 The navigation bar at the bottom of the dialog box allows you to navigate to other requirements from the query from which the displayed requirement was generated. To hide the navigation bar, click **Hide navigation** bar. To show the navigation bar, click **Show navigation bar**. The navigation bar is not visible if there only one requirement in the query results. The name of the entity from which the list of requirements was

generated is displayed in the navigation bar. These entities include a filter name, a script name, **Quick Search**, and **Query Results**.

- 9 To navigate to the next or previous requirement in the query from which the requirement was generated, click the next **▶** or previous **◀** button. To navigate to the first requirement or last requirement, click the first **⏪** or last **⏩** button.



NOTE When submitting a change request, links and containers are inherited. For further information see chapters ["Inherited Links" on page 132](#) and ["Inherited Containers" on page 138](#).

Reviewing a Change Request/Proposed Requirement

When a change request is accepted, the changed requirement replaces the current version of the requirement. If there are multiple change requests against the requirement, any requests that have not been rejected are linked to the new requirement. Therefore, you should reject unacceptable requests. For traceability, the replaced requirement is still linked to any change request, whether the request was accepted or rejected.

To review change requests submitted against a requirement:

- 1 After selecting the desired requirement in a work pane, select **Accept/Reject** from the **Requirements** set of the **Actions** pane. The **Accept Changes** dialog opens.
- 2 A list of all pending change requests against the requirement is displayed in the left pane. Select a change request to view its details.

The differences between the proposed changes and the current version are marked in the text.

- 3 Enter a reason for accepting or rejecting the change, if necessary.
- 4 Click **Accept** to accept the change request or **Reject** to reject it. In either case the reason for change entered when the request was submitted will be carried forward.



NOTE If the requirement is in an ECP-controlled document that you have not assigned an ECP to, and **Update to Current (Tip)** is in effect, the action will be halted and you will receive a message upon clicking the **Accept** button. See ["Merging Document Changes" on page 193](#).

- 5 **To accept a previously rejected change request, do the following:**
 - a Click the **Show previously rejected requests** link at the top left of the dialog box.
 - b Select the rejected change request.
 - c If you have permission to approve the rejected change request, the **Accept** button is enabled. Click the **Accept** button. Once you accept a rejected change request, you cannot reject it again.
- 6 Click **Close**.

Working with Links

Links allow you to relate requirements to each other. For example, you can link requirements in the Software Requirements class to requirements in the Test Case class. You can then run a traceability report that shows how many software requirements are covered by test cases.

In RM Browser, you can add links to or remove links from a single requirement. If you select a requirement from a category in which you do not have *Link* permission for the class, all classes, or the instance, the **Create Link** command is disabled.

Links between object versions are maintained even as objects are replaced with new versions. For example, if you link the current versions of two objects and then replace each object with new versions, the link between the previous versions remains intact.

The **Links** section offers these functions:

	Browse Links: Opens the Link Browser dialog. For details, see chapter "Using Link Browser" on page 133 .
	Suspect History: Opens the Suspect History dialog. For details, see chapter "Using the Suspect History" on page 131 .
	Expand: Expands all link sections. This function is not available when using Quick View.
	Collapse: Collapses all link sections. This function is not available when using Quick View.
	Quick View: Shows all used links in a table with a specified design. Only common attributes are available for display. Double-clicking a requirement in the table opens the requirement.
	Extended View: Shows links using the Extended View. All attributes of a class can be displayed in the table. Double-clicking a requirement in the table opens the requirement.
	Clear all suspicious links: Clears all suspicious links. For details, see chapter "Clearing Suspect Links" on page 130 .
	Properties: Opens the <i>Link Properties</i> dialog. For details, see chapter "Link Properties" on page 127 .
	Link Existing: Opens the <i>Link Requirements</i> dialog which allows to link the current requirement to an existing requirement. Link Existing is available if the user has the <i>Link</i> right for classes and the <i>Create</i> right for relationships.
	Create New & Link: Opens the <i>New Class_Name</i> dialog and links the created requirement. Create New and Link is available if the user has the <i>Link</i> right for classes, the <i>Create</i> right for classes and the <i>Create</i> right for relationships.
	Propose New & Link: Opens the <i>Propose New Requirement</i> dialog and links the created proposal. Propose New & Link is available if the user has the <i>Link</i> right for classes, the <i>CreateCR</i> right for classes and the <i>Create</i> right for relationships.
	Edit Link Attributes: Opens the <i>Edit Link Attributes</i> dialog that allows you to view and modify custom attributes for a link. For details, see chapter "Editing Link Attributes" on page 128 .

	Delete Link: Deletes the selected link. Delete Link is available if the user has the <i>Link</i> right for classes and the <i>Delete</i> right for relationships.
 	Remove Link: Permanently removes a link. Remove Link is available if the user has the <i>Link</i> right for classes and the <i>Remove</i> right for relationships. CAUTION! You cannot restore a removed link.
	Undelete Link: Restores a deleted link. Undelete Link is available if the user has the <i>Link</i> right for classes and the <i>Undelete</i> right for relationships. For details on how to undelete a deleted link, see chapter "Link Properties" on page 127.
	Raise Suspicion: Makes a linked requirement suspect. Raise Suspicion is available if the user has the <i>Link</i> right for classes and the <i>Raise Suspect Links</i> right for relationships. For details about suspect links see chapter "Suspect Links" on page 128.
	Resolve Suspicion: Clears one or several suspect links. Resolve Suspicion is available if the user has the <i>Link</i> right for classes and the <i>Clear Suspect Links</i> and <i>Mass Clear Suspect Links</i> rights for relationships. For details about clearing suspect links see chapter "Suspect Links" on page 128.

Linking an Existing Requirement

- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Links** section.
- 3 Expand the class which contains the requirement you want to link to.
- 4 Click  . This opens the *Link Requirements* dialog.
- 5 **Constraints:** As needed, specify criteria to locate the desired requirements. See "Attribute Constraints Tab" on page 43 and "Relationship Constraints Tab" on page 49.
- 6 **Display Options:** As needed, specify how to display the results. See "Display Options Tab" on page 52.
- 7 **Remember these options:** Select this checkbox to retain the current settings as the default for future invocations of the dialog.
- 8 **Filters:** If you saved filters in Quick Search, you can use these filters to search the requirement you wish linking to.
- 9 **Find Now:** Click this button to run the search. The results are displayed in the lower pane of the dialog. Each requirement that is linked to the original requirement has a chain icon  next to it.

	RQMT ID	TITLE
	COMP_000001	Utilize Tcl/Tk
	COMP_000002	Application settings will be saved
	COMP_000003	Default window size 140x100

- 10 **New Search:** Click this button to clear the current search criteria and results.
- 11 Select the requirements you want to link to. For multi-selection of requirements, see chapter "Selecting Multiple Requirements" on page 33.
- 12 Click on **Add Link**.

Linking Existing Requirements through Quick Search

A comfortable way of linking requirements with each other is the Split View function of Quick Search. The Split View allows to easily find linkable requirements and link them to each other. For further information about finding requirements, refer to chapter "Exporting Requirements" on page 98.

To use Split View for linking, follow these steps:

- 1 In the menu bar, click **Requirements** to open Quick Search.
- 2 In the Actions pane, click **Split View**. This divides the Quick Search window into two Quick Search windows.
The left Quick Search window allows selection of the parent class.
The right Quick Search window allows selection of the child class. Note that the **Classes and Attributes** box only shows classes which can be linked to the parent class.

The screenshot displays the Quick Search interface in Split View mode. The left pane shows a list of requirements for the 'Design' class, with 'DESIGN_00003' selected. The right pane shows a list of requirements for the 'Component_Requirements' class, with 'COMP_000015' selected. The 'Relationship' pane at the bottom shows the link between the two selected requirements.

Category	Design ID	Title	Modified By	Time Modified
RMDEMO	DESIGN_000001	ePhoto Actions	Ryan Forbes	31-AUG-2016@01:24:44
RMDEMO	DESIGN_000002	Photo upload	Ryan Forbes	31-AUG-2016@01:19:30
RMDEMO	DESIGN_000003	Photo uploader DB Connection	Ryan Forbes	31-AUG-2016@01:20:16
RMDEMO/ Product/CloudData	DESIGN_000004	CloudData Flow	Ryan Forbes	18-AUG-2017@02:50:21

Rqmt ID	Title	Links In	Links Out	Time Modified
COMP_000001	Utilize ToRTK	2	2	19-FEB-2018@15:50:34
COMP_000002	Application settings will be saved	1	1	19-FEB-2018@15:50:58
COMP_000003	Default window size 140x100	1	1	19-FEB-2018@15:51:18
COMP_000004	Images can be expanded to full size	1	2	19-FEB-2018@15:54:39
COMP_000005	Last 5 images will be remembered	1	3	19-FEB-2018@15:54:51
COMP_000006	Multiline text annotations	1	2	19-FEB-2018@15:55:06
COMP_000007	Cut and paste text	1	1	19-FEB-2018@15:55:42
COMP_000008	Search and replace supported	1	1	19-FEB-2018@15:55:53
COMP_000009	DB supports: Create, Read, Update, Delete	1	1	19-FEB-2018@15:56:07
COMP_000010	Database supports: Create, Read, Update, and Delete	0	2	30-SEP-2015@01:41:47
COMP_000011	Annotations stored in database	1	2	19-FEB-2018@17:15:34
COMP_000012	Asci based database	1	2	30-SEP-2015@01:41:47
COMP_000013	At least 1024 entries stored	1	1	30-SEP-2015@01:41:47
COMP_000014	Name of DB unique	1	1	19-FEB-2018@15:57:16
COMP_000015	Each user has own DB	1	1	18-AUG-2017@01:11:12
COMP_000016	DB's installed in central location.	1	1	19-FEB-2018@15:57:36
COMP_000017	Windows Desktop used	2	1	19-FEB-2018@15:57:50
COMP_000018	Launched from Windows 'Start'	2	1	19-FEB-2018@15:58:02
COMP_000019	GUI complies with Presentation Manager style guide	1	1	19-FEB-2018@15:58:17
COMP_000020	Minimum VGA supported	1	1	30-SEP-2015@01:41:48
COMP_000021	Will run on 300 MHz Celeron with 32 megs ram	1	1	30-SEP-2015@01:41:48

Figure 3-4. Quick Search in Split View mode

The right Quick Search window provides these extra functions:



Create Link: Links one or more child class requirements to one parent class requirement. Create Link is available if the user has the *Link* right for classes and the *Create* right for relationships.



TIP You can also use drag & drop to link requirements.



Delete Link: Deletes the links between one or several child class requirements and one parent class requirement. Delete Link is available if the user has the *Link* right for classes and the *Delete* right for relationships.



Remove Link: Permanently removes the links between one or several child class requirements and one parent class requirement. Remove Link is available if the user has the *Link* right for classes and the *Remove* right for relationships.



CAUTION! You cannot restore a removed link.



Undelete Link: Restores previously deleted links between one or several child class requirement and one parent class requirement. Undelete Link is available if the user has the *Link* right for classes and the *Undelete* right for relationships.

Relationship: Shows all relationships between the parent class and the child class.

Show: Filters the requirements of the child class. You can select one of these values:

- **All:** Shows all requirements.
- **Linked:** Shows only requirements which are linked.
- **Not Linked:** Shows only requirements which are not linked.
- **Deleted Links:** Shows only requirements with deleted links.



Grid View: Shows requirements in a table. This is the standard view for Quick Search.



Matrix View: Shows requirement links in a table as rows and columns.



Card View: Show requirements as separate cards. Each card shows the following information:

- Requirement ID
- Title
- Owner
- Last modification date
- Number of links



To return to the regular Quick Search window, click **Quick Search** in the Actions pane.



NOTE In order to create, delete, remove or undelete a link, you need to select one parent class requirement and one or several child class requirements.

Creating a new Requirement and linking to it

- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Links** section.
- 3 Expand the class which contains the requirement you want to link to.
- 4 Click on  . This opens the dialog to add a new requirement.
- 5 Fill out the attributes.
- 6 Click on **Save**.



NOTE If configured by the administrator, the attribute values of the parent requirement might be copied to the newly created requirement.

Proposing a new Requirement and linking to it

- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Links** section.
- 3 Expand the class which contains the requirement you want to link to.
- 4 Click on  . This opens the dialog to add a new requirement.
- 5 Fill out the attributes.
- 6 Click on **Submit**.



NOTE If configured by the administrator, the attribute values of the parent requirement might be copied to the newly created requirement.

Deleting or Removing Links



NOTE Baselined links (i.e., linked parent and child objects included in a single baseline) cannot be deleted, as this would alter the baseline content. In the case of an attempt to delete a baselined link, a warning is raised "linked objects must be replaced. Do you want to proceed?" If the user clicks OK, the baselined objects are replaced.

- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Links** section.
- 3 Expand the class which contains the requirement you want to delete or to remove.
- 4 Select the requirements you want to delete or to remove.
- 5 To delete, click on  . To remove, click on  .



CAUTION! You cannot restore a removed link.

- 6 Confirm the popup message.

Restoring a deleted Link

A deleted link is only shown in the list if you turned on the option Show deleted links for the class. For details on how to show deleted links, see chapter "[Link Properties](#)" on page 127.

To restore a deleted link:

- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Links** section.
- 3 Expand the class which contains the requirement you want to restore.
- 4 Select the deleted links you want to restore. Deleted links use an italic font and red text color.
- 5 Click on  .
- 6 Confirm the popup message.

Clearing a Suspect Link

- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Links** section.
- 3 Expand the class which contains the requirement you want to restore.
- 4 Select the suspect links you want to clear. Suspect links show an  icon in the leftmost column.
- 5 Click  .
- 6 Confirm the popup message.

For further information about suspect links, see chapter "[Suspect Links](#)" on page 128.

Link Properties

In the *Link Properties* dialog you can define for each class which data should be displayed in the **Links** section. These settings are available:

- **Attributes To Display:** To specify the attributes to display, see chapter "[Attributes to Display List](#)" on page 34.
- **Sorting Order:** To specify the sort order, see chapter "[Sorting Order List](#)" on page 35.
- **Include all requirement versions:** If checked, shows all versions of the requirements. It is recommended to include the **Current Status** attribute in the **Attributes To Display** list.
- **Show link creation information:** If checked, the list shows date and time the link was created. Note that the link creation information is used for all classes, and not just for the class selected when the dialog was opened.
- **Show deleted links:** If checked, shows delete links including the user who deleted it and date and time it was deleted.

Editing Link Attributes

If your administrator added custom attributes to a relationship, you can (or must for mandatory attributes) fill those attributes when creating a link on a new requirement (Create New & Link) or creating a link on a new change request (Propose New & Link). The link attributes are located in the **Link Attributes** section of the new requirement. If you create a link with an existing requirement, filling out the attributes is optional.

To edit link attributes, do the following:

- 1 Open the requirement from which you link from (parent).
- 2 Select the requirement you link to.
- 3 Click . This opens the *Edit Link Attributes* dialog.
- 4 Fill out or select the attribute values as required or desired.
- 5 Click **Save**.



CAUTION! If you delete a link, the link attribute values will be removed as well. Adding the link again **will not** restore the link attribute values.

Suspect Links

After relationships exist between requirements, it is possible for changes in one requirement to affect other requirements. If you are working in a team, you need to know whether a change to a related requirement has possibly rendered other requirements questionable, or "suspect."

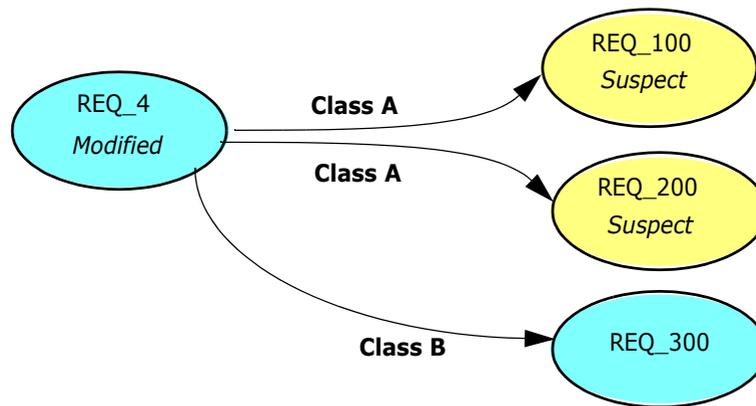
For example, suppose a marketing requirement dictates that all user interfaces adhere to the blue logo color. From this marketing requirement, there may be several linked product requirements that state that the desktop UI, the Web client, and a plugin adhere to the

blue logo color. If the marketing manager changes her mind and decides that the red logo color should be used instead, all of the linked requirements become invalid.

Actions that trigger suspect links include updating, replacing, and accepting a change request. Actions that do not trigger suspect links include linking, and baselining.

The suspect links feature allows you to clearly see which requirements are under suspicion and which ones are not. After you find a link that is marked as suspect, you can either change the requirement or if you have permission, clear the suspect status.

Not all relationships require linked requirements to be marked as suspect. The administrator decides whether a relationship participates in the suspect links feature. The following illustration shows how REQ_300 is not a suspect link, because class B does not participate in the suspect links feature.

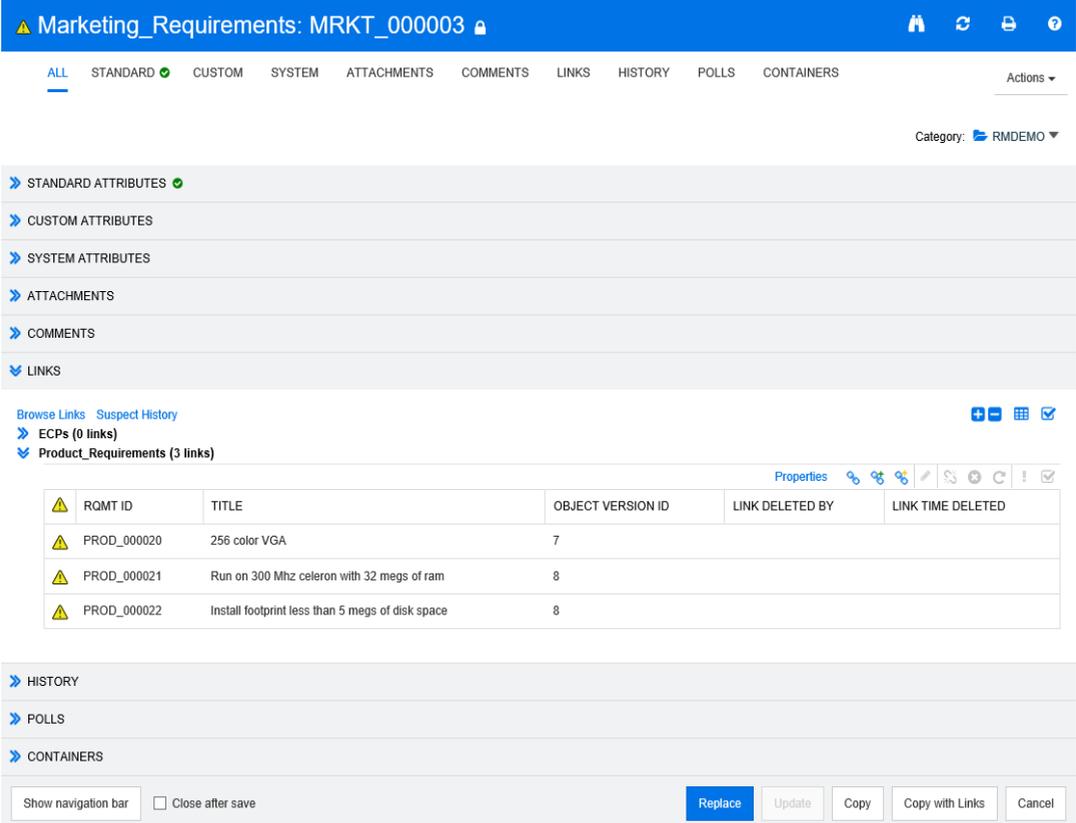


Identifying Suspect Links

To identify suspect links:

- 1 After selecting the desired requirement in a work pane, select **Edit** from the Requirements set of the Actions pane. The Edit Attributes dialog opens.
- 2 A suspect link icon  is displayed in the top left corner of the dialog box if the requirement is suspect. The icon is not displayed once all of the links that caused this requirement to be marked as suspect are cleared. Clicking the icon opens the

Suspect Reason dialog. For further information about the Suspect Reason dialog, see chapter "Suspect Reason Information" on page 130.



Marketing_Requirements: MRKT_000003

ALL STANDARD ✓ CUSTOM SYSTEM ATTACHMENTS COMMENTS LINKS HISTORY POLLS CONTAINERS Actions

Category: RMDemo

STANDARD ATTRIBUTES ✓

CUSTOM ATTRIBUTES

SYSTEM ATTRIBUTES

ATTACHMENTS

COMMENTS

LINKS

Browse Links Suspect History

ECPs (0 links)

Product_Requirements (3 links)

RQMT ID	TITLE	OBJECT VERSION ID	LINK DELETED BY	LINK TIME DELETED
PROD_000020	256 color VGA	7		
PROD_000021	Run on 300 Mhz celeron with 32 megs of ram	8		
PROD_000022	Install footprint less than 5 megs of disk space	8		

HISTORY

POLLS

CONTAINERS

Show navigation bar Close after save

Replace Update Copy Copy with Links Cancel

- 3 Expand the **Links** section.
- 4 Look at each suspect requirement and examine whether the change affects the requirement.
- 5 Change the requirement if the change affects it, or clear the suspect link if it does not affect the requirement.

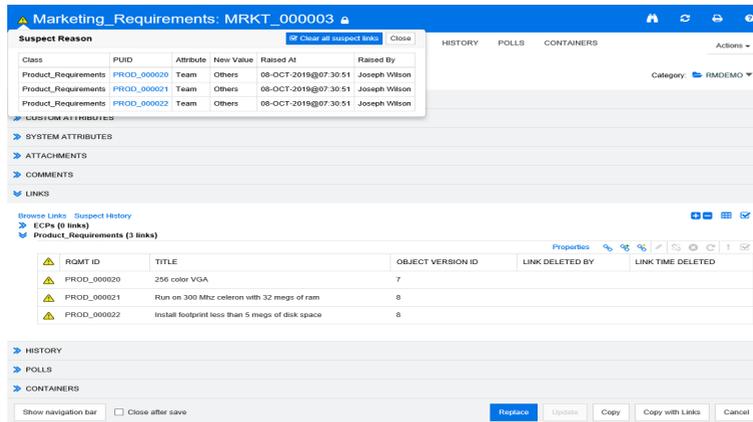


NOTE The suspect link icon is displayed in other areas of RM Browser, such as in the Quick Search query results and the navigation tree of the Document and Traceability work pages.

Suspect Reason Information

The **Suspect Reason** dialog appears when clicking the  icon in the Edit Attributes dialog, or by using the **Show Suspect Reason** item in the shortcut menu of a link in Link

Browser. This dialog provides information which attribute modification made the requirement suspect.



The following actions are available:

- Clicking the **PUID** link opens the related requirement.
- Clicking **Clear all suspect links** clears all suspect links for the requirement.

Clearing Suspect Links

To clear suspect links:

- 1 Clear all links that caused this requirement to be marked as suspect by doing one of the following:
 - Click the **Clear all suspect links** button  in the **Suspect Reason** dialog. For further information on the **Suspect Reason** dialog, see chapter "Suspect Reason Information" on page 130.
 - Click  at the top right of the **Links** section.
- 2 Clear individual links that caused this requirement to be marked as suspect by selecting the requirement or requirements and then clicking the **Resolve Suspicion** icon  at the top right of the **Links** subsection. When the last suspect link is cleared, the  icon is no longer displayed in the title bar of the dialog box.
- 3 In Requirements View, select one or several requirements and click **Resolve Suspicions** in the **Requirements** set of the **Actions** pane.
- 4 In Document View, select a requirement from the detail pane and click **Resolve Suspicions** in the **Requirements** set of the **Actions** pane.

Clearing Suspect Links When Replacing a Requirement

When you modify a requirement and click **Replace**, the following actions on suspect links are possible:

- a Suspect links are cleared automatically
- b You can choose if you want suspect links to be cleared
- c Suspect links are not cleared

The exact behavior depends on the configuration (see "Clear Suspect Links: Confirm Clearing Suspect Links on Replace" on page 80).

The following text describes the **Clear Suspect for** dialog, which is shown when replacing a requirement.

Clear Suspect for ✕

	Class	PUID	Attribute	New Value	Raised At	Raised By
<input checked="" type="checkbox"/>	Product_Requirements	PROD_000020	Team	Others	08-OCT-2019@07:30:51	Joseph Wilson
<input checked="" type="checkbox"/>	Product_Requirements	PROD_000021	Team	Others	08-OCT-2019@07:30:51	Joseph Wilson
<input checked="" type="checkbox"/>	Product_Requirements	PROD_000022	Team	Others	08-OCT-2019@07:30:51	Joseph Wilson

The **Clear Suspect for** dialog shows all suspect requirements for the modified requirement. For each requirement, the class, ID, and the attribute that triggered the suspicion with its new value are shown along with the user information and the time the change was made. Clicking the ID of a requirement opens the requirement with that ID.

To choose which suspect links you want to clear, select or clear the box for each requirement. If you clear the box, the suspect link will **not** be cleared.

Click one of these buttons:

- **Yes:** All selected suspect links will be cleared.
- **No:** No suspect links will be cleared.
- **Cancel:** The current **Replace** action is aborted. All your changes will **not be saved**.

Using the Suspect History

Whenever a requirement becomes suspect, an entry in the Suspect History is created. Each entry provides detailed information about the related clearance process.

To open the Suspect History:

- 1 Select the desired requirement in a work pane.
- 2 Select **Edit** from the **Requirements** set of the **Actions** pane. The **Edit Attributes** dialog opens.
- 3 Expand the **Links** section.
- 4 Click **Suspect History** to open the **Suspect History** dialog.

The Suspect History table provides the following information and functionality:

Column	Description
Class	Shows the class of the linked requirement.
PUID	Shows the PUID of the linked requirement. Clicking the PUID opens the linked requirement for editing.
Attribute	The name of the attribute that changed and made the requirement suspect.

Column	Description
New Value	The new value of the changed attribute.
Modified By	The name of the user who modified the requirement and made the requirement suspect.
Time Modified	The date and time the requirement became suspect
Suspicion Cleared	Describes why the suspect status was cleared. <ul style="list-style-type: none">■ Manual: The user shown under Cleared By cleared the suspect status manually.■ Replaced: The user shown under Cleared By cleared the suspect status by replacing the requirement with a new version.
Cleared By	Shows the name and/or ID of the user who cleared the suspect status for the linked requirement. Clicking the user name or ID opens a popup with infos about the user.
Cleared At	Shows the date and time the suspect was cleared.

Inherited Links

When making a proposal, any links on the originating requirement are inherited.

To identify inherited links:

- 1 After selecting the desired proposal in a work pane, select **Edit** from the Requirements set of the Actions pane. The Edit Attributes dialog opens.

Marketing_Requirements: MRKT_000004

ALL STANDARD CUSTOM SYSTEM ATTACHMENTS COMMENTS LINKS HISTORY POLLS CONTAINERS Actions

Category: RMDEMO

STANDARD ATTRIBUTES
CUSTOM ATTRIBUTES
SYSTEM ATTRIBUTES
ATTACHMENTS
COMMENTS
LINKS

Browse Links Suspect History

ECPs (1 link)
Product_Requirements (5 links)

	RQMT ID	TITLE	OBJECT VERSION ID	LINK DELETED BY	LINK TIME DELETED
P	PROD_000004	Expand image to full size	6		
P	PROD_000006	Multiline annotations	6		
P	PROD_000007	Cut and paste	6		
P	PROD_000008	Search and replace	7		
P	PROD_000015	Individual DB's per user	7		

HISTORY
POLLS
CONTAINERS

Show navigation bar Close after save

Replace Update Copy Copy with Links Cancel

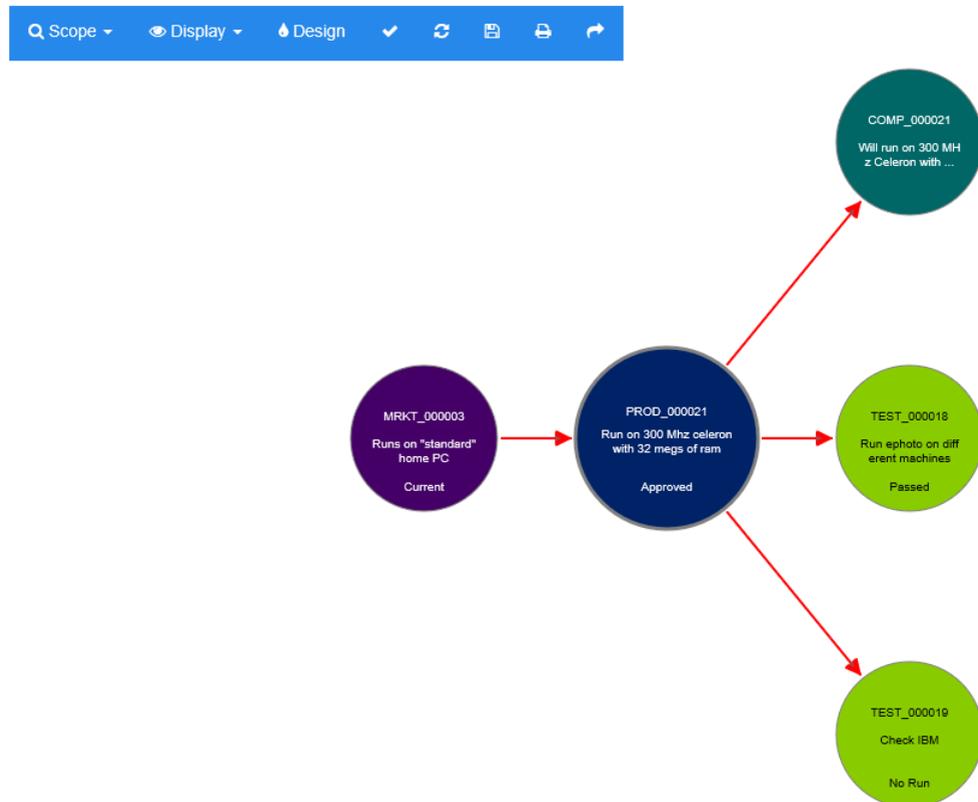
- 2 Expand the **Links** section.
- 3 Open a class which has links.
- 4 Inherited links are marked by .



NOTE When making a proposal, also the collections of the original requirement are inherited. For further information, see chapter "[Inherited Containers](#)" on page 138.

Using Link Browser

Link Browser displays the relationship of requirements and containers. To access Link Browser, select one or several requirements with links in the **Requirement View** and click on **Browse Links** in the **Requirements** set of the **Action** pane.



By clicking on a requirement, the child requirements and containers to which the requirement belongs to are shown. Double-clicking a requirement opens the *Edit Attributes* dialog. Link Browser allows zoom in or zoom out by turning the mouse-wheel.

Toolbar

The toolbar provides these general functions:



Scope: Clicking on this icon opens a sub-menu with these entries:

Classes and Relationships: Allows to select classes and/or links from one class to another class the linked requirements must belong to in order to be displayed. If you unselect all classes, Link Browser will only show the current class.

Category: Allows to select the category the linked requirements must belong to in order to be displayed.

Container: Allows to select which container the linked requirements must belong to in order to be displayed.

After making your changes, click on **Apply**.



Display: Clicking on this icon opens a sub-menu with these entries:

Containers

- **Containers:** If checked, Link Browser shows the containers the requirements belong to. A container is displayed as a light blue rectangle.
- **Only Current Objects:** If checked, Link Browser only shows current requirements and links. The status of a non-current requirement is shown at the bottom of the requirement.
- **Show Deleted Links:** If checked, Link Browser also shows deleted links. A deleted link is shown as a dashed line.
- **Highlight Suspect Links:** If checked, suspect links will be colored red.
- **Relation depth:** The specified value defines to which depth links should be followed when a requirement is loaded or clicked on. A value of 1 means that only children are displayed. Setting a value of 2 means that children and grandchildren are displayed.

After making your changes, click on **Apply**.



Design: Opens the *User Settings* dialog which allows to set the color for each class. This is identical to selecting **User Settings** in the **Login menu** and then selecting **Link Browser**. For further information on Link Browser settings, see chapter "[Link Browser Settings](#)" on page 86.



Apply: Applies the option changes and loads the objects based on the current view.



Reload: Applies the option changes and loads the objects based on the original object.



Save: Creates an image of the current Link Browser dialog which can be downloaded.



Print: Prints the Link Browser dialog.



Return to default filter: Resets the scope to its default.

Context Menu

The context menu provides functions for requirements and links.

Context Menu for Requirements

This context menu is only available when selecting a requirement. Not all of these functions may be available for every requirement:

- **Edit:** Opens the dialog for editing the requirement's attributes.
- **Browse Links:** Opens a new Link Browser dialog with the selected requirement as parent.
- **Delete:** Deletes the selected requirement.
- **Remove:** Removes the selected requirement.
- **Undelete:** Undeletes the selected requirement.
- **Resolve Suspicions:** Clears all suspect links.
- **Create Link:** Opens the *Link Requirements* dialog. This allows linking a requirement to the selected requirement.
- **Create New & Link:** When selecting a class from the sub-menu, this opens the New requirement dialog for the selected class. When saving the requirement, the new requirement is linked to the selected requirement.
- **Add to Collection:** Opens the *Add to Containers* dialog. This allows adding the selected requirement to a collection.

Context Menu for Links

This context menu is only available when selecting a link. Not all of these functions may be available for every link:

The context menu provides these functions:

- **Delete:** Deletes the link.
- **Remove:** Removes the link.
- **Undelete:** Undeletes a link.
- **Show Suspect Reason:** Opens the **Suspect Reason** dialog, which shows which requirement and attribute change caused the requirement to become suspect. For further information see chapter "[Suspect Reason Information](#)" on page 130.
- **Resolve Suspicion:** Clears the suspected link.

Working with Containers

Containers can hold requirements of any class. You can add requirements of different classes into the same container. For further information about containers, see chapter "About Collections" on page 272.

The **Container** section offers these functions:

	Properties: Opens the <i>Container Properties</i> dialog. For details see chapter "Container Properties" on page 139.
	Add to Containers: Opens the <i>Add to Containers</i> dialog which allows to add the current requirement to an existing container. Add to Containers is available if the user has the <i>Link</i> right for classes and the <i>Link</i> right for collections.
	Remove from Containers: Permanently removes the requirement from the selected container(s). Remove from Container is available if the user has the <i>Link</i> right for classes and the <i>Link</i> right for collections.
	Open Container: Opens the desired container. If the container is a document or snapshot, it will open at the first location of the requirement in the document. If the container is a collection or baseline, it will select the requirement which opened it.

The data of all containers the requirement has been added to is shown in a table. You can sort the entries of that table by clicking a column header. Clicking a column header toggles between ascending and descending sort order. A little arrow next to the sorted column name shows the sort order.

	Ascending order: The entries are sorted by the values of the marked column in ascending order (0...9, A...Z).
	Descending order: The entries are sorted by the values of the marked column in descending order (9...0, Z...A).

To create, remove, or view links in the context of a specific container, expand the container's subsection. See "Working with Links" on page 121.



NOTE The version of any linked objects displayed here corresponds to the version of the object that is in the container. That may, or may not, be the current version of the object (see the Current Status column).

See the Links section if you want to see only links to the current version of an object.

Adding a Requirement to an Existing Container

- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Container** section.
- 3 Click . This opens the *Add to Containers* dialog.
- 4 Select the containers you want to contain the requirement.
- 5 Click **OK**.

Removing a Requirement from a Container

- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Container** section.
- 3 Select the containers you want to delete or to remove.
- 4 Click  .

Opening a Container

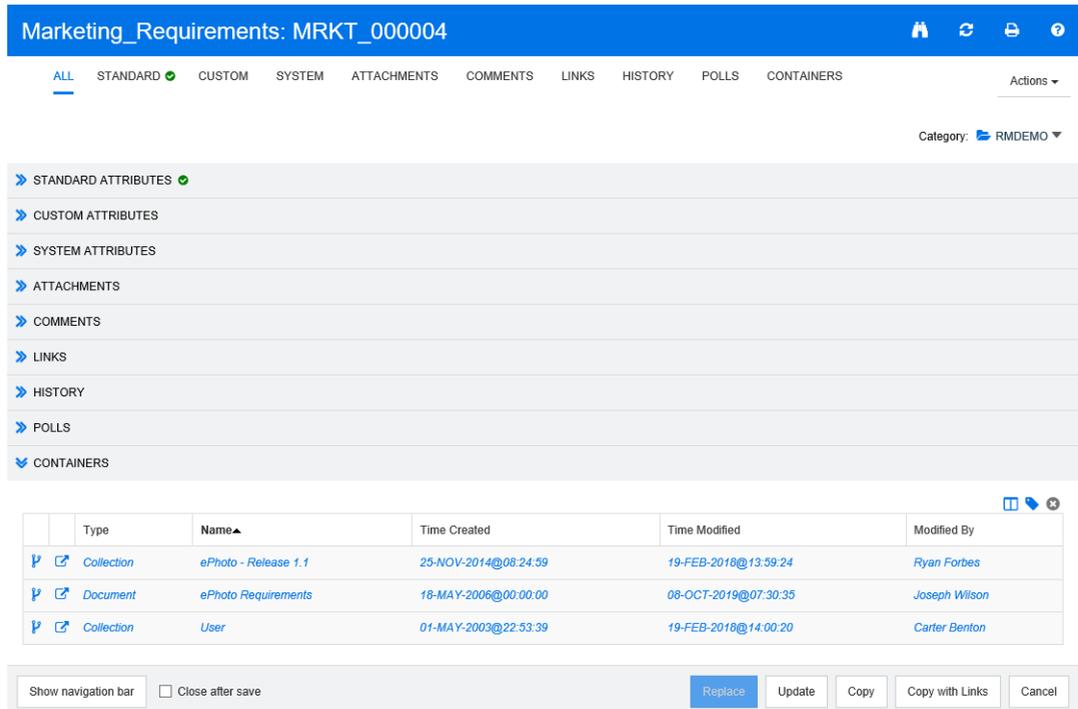
- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Container** section.
- 3 Click  next to the container you want to open.

Inherited Containers

When making a proposal, any containers on the originating requirement are inherited.

To identify inherited containers:

- 1 After selecting the desired proposal in a work pane, select **Edit** from the Requirements set of the Actions pane. The Edit Attributes dialog opens.



Marketing_Requirements: MRKT_000004

ALL STANDARD  CUSTOM SYSTEM ATTACHMENTS COMMENTS LINKS HISTORY POLLS CONTAINERS Actions

Category:  RMDEMO

STANDARD ATTRIBUTES 
 CUSTOM ATTRIBUTES
 SYSTEM ATTRIBUTES
 ATTACHMENTS
 COMMENTS
 LINKS
 HISTORY
 POLLS
 CONTAINERS

Type	Name	Time Created	Time Modified	Modified By
  Collection	ePhoto - Release 1.1	25-NOV-2014@08:24:59	19-FEB-2018@13:59:24	Ryan Forbes
  Document	ePhoto Requirements	18-MAY-2006@00:00:00	08-OCT-2019@07:30:35	Joseph Wilson
  Collection	User	01-MAY-2003@22:53:39	19-FEB-2018@14:00:20	Carter Benton

Show navigation bar Close after save Replace Update Copy Copy with Links Cancel

- 2 Expand the **Container** section.

- Inherited containers are marked by  .



NOTE When making a proposal, also the links of the original requirement are inherited. For further information, see chapter ["Inherited Links"](#) on page 132.

Container Properties

In the *Container Properties* dialog you can define which data should be displayed in the **Container** section.

▼ COLUMNS TO DISPLAY

Description Category Created By Owner State	 	Name Time Created Time Modified Modified By	 
---	--	--	--

To add columns:

- Select one or more columns in the **Columns to Display** list.
- Click  to add the selected columns.

To specify column order:

- Select one or more columns in the right-hand list.
- Click  or  to specify in which order you want the columns to appear.

To remove columns:

- Select one or more columns in the right-hand list.
- Click  to remove the selected columns.

Adding Requirements to an Existing Collection

From the Requirements view, you can add requirements to an existing collection or collections simply by selecting them and clicking a button.



TIP To add a larger and/or more complex set of requirements to a collection, use Attribute Constraints and Relationship Constraints. See ["Creating a New Baseline"](#) on page 276.

To add requirements to an existing collection:

- Select one or several requirements in a work pane.
- Select **Add to Collection** from the **Requirements** set of the **Actions** pane. The **Add to Containers** dialog opens.

- 3 Select the desired collection or collections.



TIP To filter the list of containers, enter a string in the **Find Container** field.

- 4 Click **OK**.

Removing Requirements from a Collection

From the Requirements view, you can remove requirements from a collection or collections simply by selecting them and clicking a button.

To remove requirements from a collection:

- 1 Select one or several requirements in a work pane.
- 2 Select **Remove from Collection** from the **Requirements** set of the **Actions** pane. The **Remove from Containers** dialog opens.
- 3 Select the desired collection or collections.
- 4 Click **OK**.

Working with File Attachments

You can add file attachments as attributes to an requirement. Each file attachment attribute for the requirement is represented by a single line in the **Attachments** section on the **Edit Attributes** dialog box. Depending on the configuration of the file attachment attribute, it can hold a single file or multiple files.



TIP To attach multiple files to a single file attachment attribute, store the files in a single zip file and attach the zip file to the attribute.

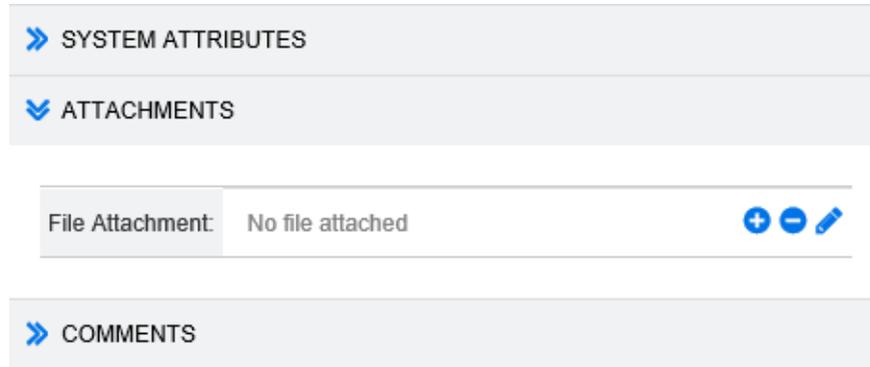


NOTE Before file attachment lines appear in the **Attachments** section, an administrator must add one or more File Attachment attributes to each relevant class. For more information, see the *Dimensions RM Administrator's Guide*.

To attach, replace, delete, or download a file:

- 1 After selecting the desired requirement in a work pane, select **Edit** from the **Requirements** set of the **Actions** pane. The **Edit Attributes** dialog opens.

- 2 If it is collapsed, expand the **Attachments** section on the **Edit Attributes** dialog box.



- 3 Do any of the following:

- : Click this button to attach a file to the requirement. The Add Attachment dialog opens. Type the full path to the file or click **Browse** to locate the file, and then click **OK**.
- : Click this button to detach the file from the requirement.
- : Click this button to replace the existing file with a different file. The Replace Attachment dialog box opens. Type the full path to the file or click **Browse** to locate the file, and then click **OK**.
- **FileName**: Click the filename link to download the file to your computer. You are prompted to either **Save** or **Open** the file.



CAUTION! File attachment changes are not saved until you click the **Update** or **Replace** button as described below.

- 4 **Show navigation bar / Hide navigation bar:** Click to show/hide the navigation bar at the bottom of the dialog. You can browse through the requirements in sequence with the **First**, **Previous**, **Next**, and **Last** controls.
- 5 Click one of the following buttons:

- **Copy** to close the dialog and copy the attribute values for use in creating a new requirement. The New *ClassName* dialog opens (see "[Creating a New Requirement](#)" on page 110).



NOTE An attribute is copied into the next requirement only if the administrator selected the **Populate On Copy** option when defining the attribute. See the *Administrator's Guide*.

- **Update** to close the dialog and save your changes without creating a new version of the requirement. (This option is not recommended if you need to maintain a history, or audit trail, of changes to requirements over time.)
- Update & Next:** As above, except the dialog remains open and the next requirement is loaded. This version of the button appears when the Navigation Bar is visible.
- **Replace** to close the dialog and save your changes as a new version of the requirement.

Replace & Next: As above, except the dialog remains open and the next requirement is loaded. This version of the button appears when the Navigation Bar is visible.

Working with Group Attributes

A group attribute is like a list attribute in that it provides a predefined list of values for user selection. But unlike a simple list attribute, a group attribute is composed of a series of sub attributes. The choices available to the user depend upon the selections they made in the higher level, or parent, attributes within the group attribute.

For example, a group attribute named Operating System contains the sub (member) attributes: Platform, Family, and Version. Platform is the first (parent) attribute in the group and includes the following values for selection: Mobile, Desktop, and Server. If Desktop is selected, desktop operating system names are available for selection in the Family sub attribute. If one of the other values is chosen in Platform, such as Mobile, The Family attribute would show mobile operating system names.

The screenshot shows a software requirements management tool interface. At the top, there is a blue header bar with the text "Tests: TEST_000001" and several icons. Below the header, there is a navigation bar with tabs: ALL, STANDARD (selected), CUSTOM, SYSTEM, ATTACHMENTS, LINKS, HISTORY, and CONTAINERS. To the right of the navigation bar is an "Actions" dropdown menu. Below the navigation bar, there is a "Category" dropdown menu set to "RMDEMO". The main content area is divided into two sections: "STANDARD ATTRIBUTES" and "CUSTOM ATTRIBUTES". Under "CUSTOM ATTRIBUTES", there are several fields: "Designer" (Engineer 1), "Estimated DevTime" (0), "Execution Date" (with a calendar icon), and "Execution Status" (Passed). Below these fields is a table for "Operating System" with columns for "Platform", "Family", and "Version". The table has two rows: the first row has "Desktop", "Windows", and "XP"; the second row has "Desktop", "Windows", and "7". Each cell in the table has a dropdown arrow and a set of three blue arrows (up, down, refresh). Below the table is a "Clear All" button. At the bottom, there is a "Planned Execution Date" field with the value "08/28/2001" and a calendar icon.

In the example above, the Family sub attribute also has a child attribute, Version, whose available values depend upon the selection made for Family. The chain of dependencies flows from left to right through the sub attributes of the group attribute.



NOTE As shown in the example above, any given requirement may include multiple value-sets (rows) of a group attribute.

In the Grid View, the example looks like the selected row of the image below:

PUID▲	Test Name	Operating System
TEST_000001	Application CRUD Processing	Desktop-Windows-XP Desktop-Windows-7
TEST_000002	Application Image Viewing Size Settings	Mobile-Android-KitKat
TEST_000003	Application Opens Image on Windows	Desktop-Windows-7 Desktop-Windows-XP Desktop-Windows-Vista



NOTE Each value-set of the group attribute, Requester, appears on its own line within the requirement's row.

For display in the grid, the individual values of the group attribute are separated by a dash character (-). The first line (value-set) in our example is: Desktop-Windows-7, so Desktop is the value of Platform, Windows is the value of Family, and 7 is the value of Version.

The icons to the rightmost attribute box provide these functions:

-  Adds a new (empty) row
-  Adds a new row with the values of the selected row
-  Removes the selected row; the **Clear All** removes all rows in the group.



NOTE If configured by your administrator,  and  are not available and you can only select one row of values for this group attribute.



TIP To quickly create value-sets representing each possible value of a given member, select the **Select All** drop-down menu item for that member.

Viewing Requirement History

A requirement history lets you track changes to a requirement over time. A **History** section is displayed on a requirement form if the requirement is displayed in grid format. You can select the attributes that you see in the form and the order in which the attributes are displayed. You can also use the **History** section to see the differences between the requirement that is open and a selected version of the requirement or between two other versions of the requirement.

To view the history of a requirement:

- 1 After selecting the desired requirement in a work pane, select **Edit** from the Requirements set of the Actions pane. The Edit Attributes dialog opens.

2 Expand the **History** section.

LINKS

HISTORY

Pedigree Properties Differences C

	TIME MODIFIED	MODIFIED BY	CURRENT STATUS
	18-MAY-2006@09:16:32	Ryan Forbes	Replaced
	25-NOV-2014@08:22:31	Ryan Forbes	Replaced (Baselined)
	30-SEP-2015@01:54:24	Ryan Forbes	Current

POLLS

When using branching, you may get additional information by hovering over the icon in the **Current Status** cell of the **History** set. Note that an icon may not be present in all cases.

: The requirement was branched (provided) to a different product or project or the requirement version was used to create a new version by synchronization.

: The requirement was branched (provided) from another product or project.

: The requirement was synchronized.

Clicking (preceding a history entry), opens the history details dialog between the current and the selected item.

Details ⏏		
Attribute	Prior Value	New Value
Text	The system shall make use of multiple monitors.	The system shall make use of multiple monitors. The system shall save the monitor dimensions and locations and recognize them when started.
Priority	Medium	High
Team		General
Workflow State	Proposed	In Analysis
Owner	Erica Morgan	Ryan Forbes
File Attachment		Diagram.jpg
Manager	Erica Morgan	Henry Miller

Figure 3-5. History Details Dialog

You can open the **History Differences** dialog by clicking , which is located in the title bar of the history details dialog.

Viewing History Differences

You can view the differences between the open requirement and a selected version of the requirement, or between two versions of the requirement.

To view the differences:

- 1 Expand the **History** section, if it is not already expanded.

» LINKS

» HISTORY

Pedigree [Properties](#) [Differences](#) [C](#)

	TIME MODIFIED	MODIFIED BY	CURRENT STATUS
 	18-MAY-2006@08:59:35	Ryan Forbes	Replaced (Baselined)
	30-SEP-2015@01:41:48	Ryan Forbes	Current

» POLLS

- 2 Click **Differences**.

- 3 Perform one of the following actions:

- If you want to compare the open requirement with another version of the requirement, select the other version and then click **Differences**.
- If you want to compare two versions of the requirement, select them and then click **Differences**.

The **History Differences** dialog box opens, and contains visual indications of what changed between the two versions.

History Differences for Product_Requirements: PROD_000078
?

Category: RMDEMO/Data

STANDARD ATTRIBUTES

Rqmt ID: PROD_000078 Title: Monitor Support

Text
The system shall make use of multiple monitors. [The system shall save the monitor dimensions and locations and recognize them when started.](#)

CUSTOM ATTRIBUTES

SYSTEM ATTRIBUTES

Created By: Joseph Wilson	Current Status: Replaced Current
Initial Created By: Joseph Wilson	Initial Time Created: 16-JUN-2020@10:35:19
Modified By: Joseph Wilson	Object ID: 485486
Object Version ID: 42	Owner: DEV_MANAGEREPHOTO
Requirement Link: http://supportvm2016.8080/rtm/Browser/cgi-bin/rtm/Browser.exe?goto=req&db=RTM&proj=RMDEMO&c=2&o=486	Suspect: No
Time Created: 16-JUN-2020@10:35:19 16-JUN-2020@10:37:03	Time Modified: 16-JUN-2020@10:37:03 16-JUN-2020@10:40:25
Workflow State: Proposed In Analysis	

Close



NOTE

- If only one version is displayed in the **History** section, and you click **Differences**, an error message is displayed, because you cannot compare a requirement to itself.
- If you select more than two versions in the **History** section, the **Differences** link is disabled, because you can only compare two versions at the same time.
- The version with the greater Object ID is used as the newer item.
- A new requirement is not displayed in the **History** section.
- In the default.xml file, the **History** section is called "history." If this conflicts with the name of a user-customized section, the administrator must modify the customization. For more information about Web form customizations, see the *Dimensions RM Administrator's Guide*.

Changing the Attributes in the History Section

You can change the attributes that you see in the **History** section, and specify the order of the attributes.



NOTE

- In the **History Properties** dialog box, if you move all attributes from the boxes on the right to the **Attributes to Display** and **Sorting Order** boxes, the default attributes and sorting are used in the **History** section.
- The attributes and their order are remembered for each class and are used when viewing the history for any requirement in that class.

To change the attributes:

- 1 Expand the **History** section, if it is not already expanded.
- 2 Click **Properties**. The **History Properties** dialog box opens.
- 3 To specify the attributes to display, see chapter "[Attributes to Display List](#)" on page 34.
- 4 To specify the sort order, see chapter "[Sorting Order List](#)" on page 35.

Changing Requirement Versions in Documents

In some cases, you need to change the requirement within a document to a different version as the one which is already in the document. To do this, execute these steps:

- 1 Open the document with the requirement you want to change the version for.
- 2 Select that requirement.
- 3 Expand the **History** section.

HISTORY					
Pedigree Properties Differences C					
		TIME MODIFIED	MODIFIED BY	CURRENT STATUS	
			18-MAY-2006@09:17:06	Ryan Forbes	Replaced
			25-NOV-2014@08:23:23	Ryan Forbes	Replaced
			30-SEP-2015@01:54:24	Ryan Forbes	Current (Baselined)

[POLL](#)

- 4 Find the version you want to use and click . This opens the **Exchange Requirement** dialog.

Exchange Requirement ✕

Are you sure you want to exchange requirement 'MRKT_000029' version 3 with version 1?

Also exchange requirements in these document(s):

<input type="checkbox"/>	Name	Time Created	Time Modified	Modified By
<input checked="" type="checkbox"/>	ePhoto Tablet Requirements	16-JUN-2020@13:16:17	16-JUN-2020@13:16:17	Joseph Wilson

By selecting the documents in the list, the requirement version will be exchanged for these documents as well. To select a document, click into the box next to its name. To select all documents, click the box in the heading (next to the **Name:** heading).



NOTE The **Exchange Requirement** dialog only shows those documents which have the **Update To Current (Tip)** option disabled.

- 5 Click **Yes**.

Using Pedigree View

Pedigree View is a graphical representation of the history of a requirement.

To open Pedigree View, follow these steps:

- 1 Select the desired requirement in the Requirements View.
- 2 Click **Pedigree** in the Requirements set of the Actions Pane. This opens the **Pedigree View** dialog.

If the requirement is shown in the **Edit Attributes** dialog, you can follow these steps:

- 1 Expand the **History** section.
- 2 Click **Pedigree**. This opens the **Pedigree View** dialog.

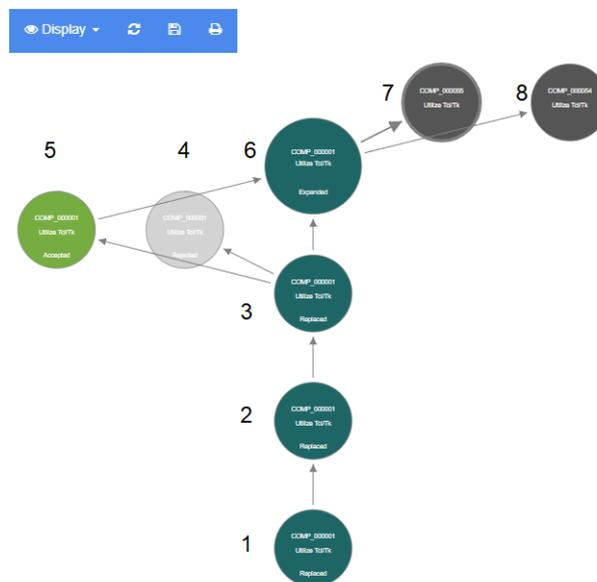


Figure 3-6. Pedigree View of a requirement

The elements in the figure above have the following meaning:

- 1 This is the original requirement.
- 2 This is a modified version of #1.
- 3 This is a modified version of #2.
- 4 This is a rejected proposal based on #3.
- 5 This is an accepted proposal based on #3.
- 6 This is the requirement which resulted on the accepted proposal (#5). This requirement has been expanded (split) into 2 requirements (#7 and #8).
- 7 This is a requirement which was created by expanding #6.
- 8 This is a requirement which was created by expanding #6.

The Pedigree View tool bar provides these functions:



Reload: Reloads the Pedigree View dialog.



Download: Creates an image of the current Pedigree View dialog which can be downloaded.



Print: Prints the Pedigree View dialog.

The shortcut menu (right-click a requirement element), provides these functions:

Open: Opens the selected version of the requirement.

Make Current: Creates a new version of the requirement with the data of the selected version.

Expand: Expands the requirement.

Note that you can only expand requirements with object status **Current** or **Expanded**. For further information about expanding requirements, see chapter ["Using the Expand Feature" on page 116](#).

Show Differences: Opens the **History Differences** dialog which shows the changes between the selected version and the current version. Note that this function is not available if the selected version is the current version.

Browse Links: Opens **Link Browser** on the selected version of the requirement.

Pedigree: Opens another **Pedigree View** dialog for the selected requirement.



NOTE Pedigree View uses the settings of Link Browser. If you change the settings for Link Browser, this also changes the settings for Pedigree View.

Merging Requirement Changes



NOTE RM Browser can be configured to use locking or merging to handle the situation when multiple users want to edit a requirement or chapter at the same time. This section describes requirement merging. For information about the locking mechanism, see ["About Requirement Locks" on page 105](#).

This configuration is set in the **Instance Settings** dialog. See ["Configuring Instance Settings" on page 377](#).

If RM Browser is configured to use merging, requirement changes must be merged when two users edit a requirement at the same time.

Changes can be *automatic* or *conflicting*, as described in the following table.

Change Type	Description
Automatic	When the change made by the first user is the same as the change made by the second user or when the change made by the first user is distinct from any change made by the second user, automatic merging can occur because a review of the change is not strictly necessary. However, it is recommended that the second user review the change made by the first user before accepting it.
Conflicting	When the change the second user makes conflicts with the change the first user made, the second user must review the changes and do one of the following: <ul style="list-style-type: none"> ■ Accept the change the second user made ■ Accept the change the first user made ■ Accept the original value ■ Combine the changes manually by editing the value directly in the main part of the dialog box

The following scenario summarizes the actions that lead to requirement merging.

- 1 Two users edit a requirement at the same time.
- 2 The first user clicks **Replace** on the **Edit Attributes** dialog box. The requirement is replaced and the **Edit Attributes** dialog box closes.
- 3 The second user clicks **Replace** on the **Edit Attributes** dialog box.
- 4 The second user is notified that the first user made one or more changes to the requirement. The notification either tells the second user that the merge can be done automatically (because the change the first user made does not conflict with the change the second user made) or that the changes conflict and must be resolved before the second user can replace the requirement.
- 5 The second user clicks **OK** on the notification message. The **Edit Attributes** dialog box becomes the **Merge Attributes** dialog box. The **Merge Attributes** dialog box differs from the **Edit Attributes** dialog box in that the **Merge Attributes** dialog box:
 - Has a section at the top that summarizes the changes and provides a user interface for merging the changes
 - Does not have an **Update** button

- Has visual indications next to its attributes that identify the type of merge that the second user selected
- 6 The second user uses the merge section at the top of the **Merge Attributes** dialog box to resolve the changes as described in "Viewing Prior Versions of the Requirement" on page 151 and "Merging Changes" on page 152.

Merge Status

The merge status of the changes made by Mary and Joe are highlighted in the **Changed Attributes** section at the top of the **Merge Attributes** dialog box.

Component_Requirements: COMP_000024

ALL STANDARD CUSTOM SYSTEM ATTACHMENTS COMMENTS LINKS HISTORY POLLS CONTAINERS Actions

Changed Attributes

ATTRIBUTE	CHANGES BY MARY	CHANGES BY JOE	MERGE STATUS
Text	None	This effort shall be undertaken using the Tcd/Tk scripting language. This ensures rapid prototyping and high portability. Tcd/Tk currently runs on: Windows 3.11, Windows 95, Windows NT, <u>Windows XP</u> and various UNIX flavors.	Automatic
Verification Level	Module	ModuleComponent	Conflict
Verification Method	Inspection	InspectionAnalysis	Conflict

Rqmt ID: COMP_000024 Title: Utilize Tcd/Tk

Text

File Edit Insert View Format Table Tools

Formats B I A Arial 9pt

Glossary

This effort shall be undertaken using the Tcd/Tk scripting language. This ensures rapid prototyping and high portability. Tcd/Tk currently runs on: Windows 3.11, Windows 95, Windows NT, Windows XP and various UNIX flavors.

Close after save Replace Copy Copy with Links Cancel

Joe made the first change when he added "Windows XP" to the *Text* attribute. In the **Merge Status** column, **Automatic** is selected in the list, because the change does not involve a conflict with a change that Mary made. The icon that represents an automatic merge is a diamond shape with a merge arrow in it and is displayed to the left of the **Merge Status** list and to the left of the **Text** attribute box in the main part of the dialog box.

The second change and third change involve conflicts. In the second change, Joe changed the *Verification Level* attribute value to **Component**, but Mary changed this attribute value to **Module**. In the **Merge Status** column, **Conflict** is selected in the list. The icon that represents a conflict is a triangle with an exclamation point in it and is displayed to the left of the **Merge Status** list and to the left of the *Verification Level* attribute in the main part of the dialog box.

The third change also involves a conflict because Mary changed the *Verification Method* attribute value to **Inspection** while Joe changed it to **Analysis**.

Viewing Prior Versions of the Requirement

It can be useful to view prior versions of the requirement before you resolve changes.

- The second user can view the original version of the requirement by clicking the **View original version of requirement** button  or by clicking **Original** in the appropriate **Merge Status** column list.
- The second user can view the requirement in the state it was in after the first user made changes but before the second user made changes by clicking the **New version of requirement prior to your changes** button .

Merging Changes

After the second user has decided how to resolve the changes, he or she can merge them.

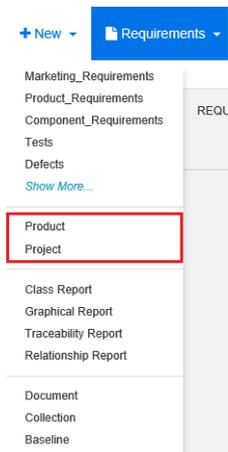
To merge changes:

- 1 If **Automatic** is selected in the **Merge Status** column list box, perform one of the following steps:
 - Retain the **Automatic** selection to accept the change.
 - Select the name of the user who made the change to accept the change.
 - Select **Original** to restore the attribute to its original value.
- 2 If **Conflict** is selected in the **Merge Status** column list box, perform one of the following steps:
 - Select the name of the user whose change you want to accept.
 - Select **Original** to restore the attribute to its original value.
 - Edit the value manually in the main form so that it matches the value you want to accept.
- 3 If you want to accept all changes made by a particular user (for example, Mary or Joe), click the **Accept all changes by Mary** button  or the **Accept all changes by Joe** button .
- 4 Click **Replace**.

Branching and Merging Requirements

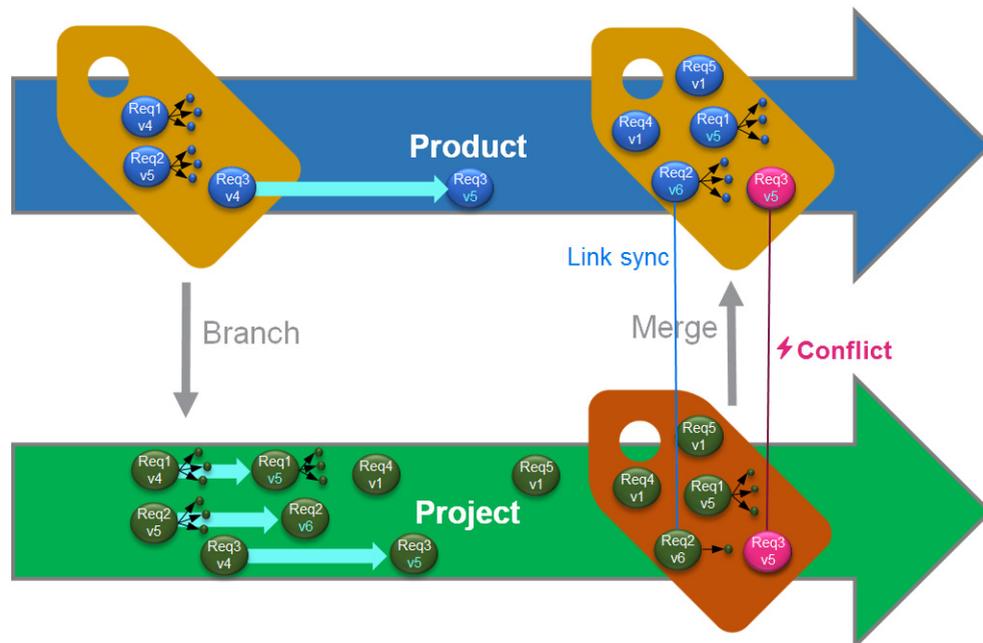
If your administrator created the Product and Project classes, you can use the branching and merging functionality for requirements. Note that the classes are not necessarily named "Product" and "Project". However, for simplicity, this guide uses the names "Product" and "Project". To verify if the Product and Project classes are installed, open the

New menu in the menu bar. If you can see two class names underneath the **Requirement** entry as in the image below, branching is available.



About Branching and Merging

Branching and merging of requirements provides support for maintaining variants. Requirements that belong to a product, may be branched, modified and later merged back into the original product requirements. The initial branch creation copies requirements from the product (the parent) to the project (the child), but they remain connected - even if their versions change..



The image above shows the following scenario:

- 1 For Product, a branch (the Project) is created. This copies the (blue) requirements Req1, Req2 and Req3 to Project (shown as green requirements). You can see that the version number for each of the green requirements is identical with their counterparts of the blue requirements.

- 2 In Project, the green requirements Req1, Req2 and Req3 are modified. For Req2 also the links are removed. Due to these modifications, the version numbers of the green requirements increase.
- 3 For Product, requirement Req3 is modified as well. Although both, blue and green, Req3 requirements share the version number (both are v5), they are not identical.
- 4 During the process, requirements Req4 and Req5 are created for Project.
- 5 When merging the requirements from Project to Product, you
 - a can specify if you want to take over the new requirements Req4 and Req5;
 - b can choose if you want to remove or keep links;
 - c can choose which attribute values you want to copy from each Project requirement.

Creating a New Project

The creation of a project will create a category of the same name. Requirements created within or copied to the Project will be placed into this category, or into a category below it.

To create a new project, do the following:

- 1 In the menu bar, click **New** and select *Project* (the third entry) from the menu. This opens the **New Project** dialog.
- 2 If desired, you can choose a sub-category. However, sub-categories have the following limitations:
 - A sub-category must not be a project itself.
 - A sub-category can only be underneath the **Project** category.
- 3 Specify the **Short Name**; the short name must be unique.



NOTE If your administrator only created the Project class, the **Short Name** attribute may not be available.

- 4 If desired, specify the **Description**.
- 5 To assign products to the new project, do the following:
 - a Click **Assignment**. This opens the **Assign Product(s)** dialog.
 - b From the list, select the product or products you wish to assign.
 - c Click **OK**.
- 6 If desired, assign the project to a container. For further information on containers, see chapter "[Working with Containers](#)" on page 137.
- 7 **Close after save:** Select this check-box to close the project after saving it. Otherwise, the project opens for editing after you save it.
- 8 Click one of the following buttons:
 - **Save** to create the new project and close the **New Project** dialog. The project opens for editing if the **Close after save** checkbox is not selected. See "[Editing a Requirement](#)" on page 114.

- **Save & Copy** to create the new project and retain the attribute values for creating another new project.



NOTE An attribute is copied into the next project only if the administrator selected the **Populate On Copy** option when defining the attribute. See the *Administrator's Guide*.

- **Save & New** to create the new project and clear the attribute values for creating another new project.

Creating a New Product

The creation of a product will create a category of the same name. Requirements created within or copied to the Product will be placed into this category, or into a category below it.

To create a new product, do the following:

- 1 In the menu bar, point to **New** and select **Product** (the second entry) from the menu. This opens the **New Product** dialog.
- 2 If desired, you can choose a sub-category. However, sub-categories have the following limitations:
 - A sub-category must not be a product itself.
 - A sub-category can only be underneath the **Product** category.
- 3 Fill the **Name** box.
- 4 If desired, specify the **Description**.
- 5 Specify the **Short Name**; the short name must be unique.



NOTE If your administrator only created the Product class, the **Short Name** attribute may not be available.

- 6 If you want to assign this product to one or several projects, do the following:
 - a Click **Assignment**. This opens the **Assign Project(s)** dialog.
 - b From the list, select the project or projects you wish to assign this product to.
 - c Click **OK**.
- 7 If desired, assign the project to a container. For further information on containers, see chapter "[Working with Containers](#)" on page 137.
- 8 **Close after save:** Select this check-box to close the product after saving it. Otherwise, the product opens for editing after you save it.
- 9 Click one of the following buttons:
 - **Save** to create the new product and close the **New Product** dialog. The product opens for editing if the **Close after save** checkbox is not selected. See "[Editing a Requirement](#)" on page 114.

- **Save & Copy** to create the new product and retain the attribute values for creating another new product.



NOTE An attribute is copied into the next product only if the administrator selected the **Populate On Copy** option when defining the attribute. See the *Administrator's Guide*.

- **Save & New** to create the new product and clear the attribute values for creating another new product.

Editing a Project

This section describes using the **Edit Attributes** dialog to edit an existing Project.



TIP Some attributes can be directly edited in the Editable Grid view. In this view, it is possible to edit an attribute across multiple requirements at once. See "[Editable Grid, Grid, and Form Views](#)" on page 29.

To edit an existing Project, do the following:

- 1 After selecting the desired Project in a work pane, select **Edit** from the **Requirements** set of the **Actions** pane. This opens the **Edit Attributes** dialog.
- 2 Continue with point 2 in chapter "[Creating a New Project](#)" on page 154.

Editing a Product

This section describes using the **Edit Attributes** dialog to edit an existing Product.



TIP Some attributes can be directly edited in the Editable Grid view. In this view, it is possible to edit an attribute across multiple requirements at once. See "[Editable Grid, Grid, and Form Views](#)" on page 29.

To edit an existing Product, do the following:

- 1 After selecting the desired Product in a work pane, select **Edit** from the **Requirements** set of the **Actions** pane. This opens the **Edit Attributes** dialog.
- 2 Continue with point 2 in chapter "[Creating a New Product](#)" on page 155.

Branching a Single Requirement

Requirements may be branched from a working *Project* to an existing *Product*, and from a working *Product* into a related *Project*. The branch targets listed in the Provide dialog are based on the current location.

To branch a requirement, do the following:

NOTE The attributes displayed with the Project or Product classes in the **Provide** dialog use the attributes selected in Quick Search for Project and Product Classes (see ["Quick Search Settings" on page 81](#)).

- 1 Open the requirement for editing (see chapter ["Editing a Requirement" on page 114](#)).
- 2 Expand the **Used in Project** section.
- 3 Click **Provide** to open the Provide dialog.
 - **Product:** Select the *Project* you want to branch the *Product* to.
 - **Project:** Select the *Product* you want to branch to the *Project*.
- 4 Click **OK**. This branches the requirement immediately, you do not have to choose **Replace** or **Update**.

Branching Multiple Requirements in Branch View

Branching several requirements is most conveniently done through **Branch View**. Branch View is a specialized view and allows you

- to query the requirements of a *Product* and branch them to the related *Project* or
- to query the requirements of a *Project* and branch them to the related *Product*.

To open Branch View, do the following:

- 1 In the menu bar, point to **Requirements**.
- 2 Select **Branch View** from the menu.

Branch View is split into 2 parts:

- The left-hand side allows querying requirements for the selected *Product* or *Project*.
- The right-hand side allows branching and merging.

You can branch one or several requirements from Branch View. If you select a single requirement, Branch View shows some additional info in the table on the right-hand side:

-  The selected requirement has been branched.
-  The selected requirement or the branched requirement has been modified.



NOTE Branch View also allows you to merge a single requirement. If you want to merge several requirements, it is recommended to use Synchronize View (see chapter ["Merging Multiple Requirements" on page 160](#)).

Branching Requirements**To branch one or multiple requirements, do the following:**

- 1 In the menu bar, point to **Requirements** and select **Branch View** from the menu.
- 2 From the **Source** box, select the *Product* or *Project* for which you want to branch requirements.
- 3 Click  to view the query sections.
- 4 In the **Classes and Attributes** section, select the class which contains the requirements you want to branch.
- 5 If desired, add attributes or containers to filter the requirements. For further information, see chapter "[Finding Requirements with Quick Search](#)" on page 92.
- 6 Click **Search**.
- 7 Select the requirements you wish to branch.
- 8 Click **Provide**.
- 9 On the success message, click **OK**.

Branching Multiple Requirements of a Category

To branch multiple requirements of a category, do the following:

- 1 Open the Home View by clicking .
- 2 In the category tree, select the category that holds the requirements you wish to branch. The category must be a child of either the *Product* or *Project* category.
- 3 Click **Provide Category** from the **Category** set of the **Actions** pane. This opens the **Provide Category Content** dialog.
- 4 Select the requirements you wish to branch.
- 5 If you want to keep links to other requirements, ensure that the **Provide with Links option** is selected.
- 6 Click **OK**.

Branching Multiple Requirements of a Document

For regular documents (not Master or Child documents), you can branch one or multiple requirements that are linked of the document.

To branch multiple requirements of a document, do the following:

- 1 Open the Home View by clicking .
- 2 Select the **Documents** tab.
- 3 In the category tree, select the category that holds the document with the requirements you wish to branch. The category must be a child of either the *Product* or *Project* category.
- 4 Select the document (which is not a Master or Child document) with the requirements you wish to branch.

- 5 Click **Provide** from the **Category** set of the **Actions** pane. This opens the **Provide Document Content** dialog.
- 6 Select the requirements you wish to branch.
- 7 If you want to keep links to other requirements, ensure that the **Provide with Links option** is selected.
- 8 Click **OK**.

Merging a Single Requirement

Using the Synchronize Dialog

The **Synchronize** dialog is used on a single requirement.

- 1 On top of the **Synchronize** dialog, you can choose from these options:
 - a **Apply changes to <REQUIREMENT_ID> (source)**: This copies all attribute values from the *Project* requirement to the associated *Product* requirement.
 - b **Apply changes to <REQUIREMENT_ID>.<SHORT_NAME> (provided)**: This copies all attribute values from the *Product* requirement to the associated *Project* requirement.
 - c **Ignore changes**: This disables all attributes.
- 2 Next to attribute names, you might see . This means that this attribute is disabled and will not be synchronized. You can enable these attributes by clicking .
- 3 An enabled value may show an arrow next to the attribute name. Clicking toggles between these synchronize options for the attribute:
 - Apply changes to <REQUIREMENT_ID> (source)
 - Apply changes to <REQUIREMENT_ID>.<SHORT_NAME> (provided)
 - Ignore changes
- 4 Click **OK**. This branches the requirement immediately, so you do not have to click **Replace** or **Update**.

Merging a Single Requirement with the Edit Attributes Dialog

To merge a requirement, do the following:

- 1 Open the requirement for editing (see chapter ["Editing a Requirement" on page 114](#)).
- 2 Expand the **Used in Project** section.
 - **Product**: Select the *Product* you want to branch the *Product* to.
 - **Project**: Select the *Product* you want to branch to the *Project*.
- 3 Click **Synchronize**. This opens the **Synchronize** dialog.
- 4 Follow instructions as described in chapter ["Using the Synchronize Dialog" on page 159](#).

Merging a Single Requirement with Branch View

To merge a requirement, do the following

- 1 In the menu bar, point to **Requirements** and select **Branch View** from the menu.
- 2 From the **Source** box, select the *Product* or *Project* for which you want to merge a requirement.
- 3 Click  to view the query sections.
- 4 In the **Classes and Attributes** section, select the class which contains the requirement you want to merge.
- 5 If desired, add attributes or a container to filter the requirements. For further information, see chapter ["Finding Requirements with Quick Search" on page 92](#).
- 6 Click **Search**.
- 7 Select the requirement you wish to merge.
- 8 Click **Synchronize**. This opens the **Synchronize** dialog.
- 9 Follow instructions as described in chapter ["Using the Synchronize Dialog" on page 159](#).

Merging Multiple Requirements



NOTE When merging multiple requirements, all attribute values are accepted.

To merge multiple requirements, do the following:

- 1 In the menu bar, point to **Requirements** and select **Synchronize View** from the menu.
- 2 From the **Source** box, select the *Product* or *Project* for which you want to merge a requirement.
- 3 From the **Target** box, select the *Project* or *Product* (entries depend on your choice in **Source**).
- 4 Do one of the following:
 - Click **<** to select a single requirement for merging.
To indicate that the requirement will be synchronized, the button changes color.
 - Click **«** to select all requirements for merging.
To indicate that the requirements will be synchronized, the buttons change color.



TIP

- Clicking **<** toggles the current selection for one requirement.
- Clicking **«** toggles the current selection for all requirements.

- 5 Click **Apply Changes**. This synchronizes all selected requirements.

Removing a Single Requirement from a Branch

To remove a requirement from a branch, do the following:

- 1 Open the requirement for editing (see chapter "Editing a Requirement" on page 114).
- 2 Expand the **Used in Project** or **Used in Product** section.
- 3 Select the project or product you want to remove the requirement from.
- 4 Click **Unprovide**. This opens the **Unprovide Requirement(s)** dialog.
- 5 Click **OK**. This removes the link between the requirement and the product or project immediately. The requirement will change its Current Status to **Deleted**.



NOTE If you add the requirement back to the project or product you deleted it from, the requirement will be undeleted and the link will be restored.

Using Product or Project without Branching

If your administrator created only the *Product* or *Project* class, branching is not available. However, the functionality for creating/editing a Product or Project is still available.

Polling

Polling allows you to solicit feedback about a requirement from selected users. Polls are typically used to decide whether a specific requirement should be accepted, or to reach consensus concerning the content of a requirement.

A poll consists of a question, at least two answers, and at least one participant. In RM Browser, if you have the appropriate permissions, you can create and modify polls. Poll participants use RM Browser to vote and view current poll results.

Creating a Poll

A user with the "Create" permission for the Poll class can create a poll. Before a poll can be created, the Poll class and a relationship to the required classes must be added to the database using the Class Definition tool. When you create relationships between other classes and the Poll class, the other classes must be primary and the Poll class must be secondary. For more information, see the *Dimensions RM Administrator's Guide*.

To create a poll:

- 1 After selecting the desired requirement in a work pane, select **Setup Poll** from the Requirements set of the Actions pane. The **Setup Poll** dialog opens.
- 2 Type the title of the poll. The poll title does not have to be unique; other polls can have the same title.
- 3 Type the question for which you need feedback.
- 4 Type at least two answers to the poll.

There is no practical limit to the number of answers that you can include. When you begin typing in the last answer field, a new answer field is automatically created below it.

Setup Poll: COMP_00017

GENERAL PARTICIPANTS

Title: Documentation

Question: What documentation should be included in this package?

Answers:

- Getting Started Guide
- Online Help
- Tutorial**

Response deadline: No deadline

- 5 To rearrange the answers:
 - Click the **insert** button to add a new answer above the selected answer, instead of adding it to the end of the list.
 - Select an answer and click the **delete** button to delete it. Blank answers do not have to be deleted because they are ignored.
 - Click the up arrow and down arrow buttons to move the selected answer up or down in the list.
 - Click the **sort** button to sort the answers alphabetically.
- 6 In the **Response deadline** section, either select **No deadline** or select the date and time that the poll should close.

The poll closes when the selected date and time have passed, when the poll creator clicks the **Stop** button, or when all participants have voted.
- 7 Click the **Participants** tab.
- 8 Select the users you want to participate in the poll. A minimum of one participant is required.

If you select a user group, its members are displayed below the lists on the **Create Poll** dialog box.

Setup Poll: COMP_000017 ?

GENERAL
PARTICIPANTS

Choose users to include

<All Users>

<Administrators>
 <BUSINESS_ANALYST>
 <icDemo Users>
 <MANAGER>
 Alexis Grosby
 Carter Benton
 Daniel Hughes
 Emma Commar
 Eric T. O'Brien
 Erica Morgan
 Ethan Hyde
 Henry Miller
 Hercule Poirot
 James McCall
 Jess Mack
 Jordan Cooper
 Joseph Wilson
 Julia Combs
 Luck McMallon

➔
➜

Users

Members of group All Users:
 MANAGEMENT; EPHOTO_INFO; ENGINEERING; TEST_MANAGER; BUSINESS_ANALYST; DEV_MANAGER;
 RTMADMIN; PRODUCT_MANAGER; TEST; TRAINING; SUPPORT; DEV; JOE; QA; MARKETING;
 PROJECT_MANAGER; MARY; TECH_PUBS; EPHOTO; ADMINISTRATION; SALES; DEVELOPMENT

Start
Cancel

- 9 Click **Start** to start the poll.

Modifying a Poll

The user who created the poll or a user with the "Update" permission for the Poll class can modify an existing poll. If the poll is already active, you can stop the poll, change the deadline, or add users or groups to the list of participants. The user cannot change the poll title or question.

To modify a poll:

- 1 Click **Modify** under **Polls** on the **Edit Attributes** dialog box or on the Requirements View. The **Modify Poll** dialog box opens.
- 2 Change the polling information.
- 3 Click **Modify**.

Closing a Poll

To close a poll:

- Click **Modify** under **Polls** on the **Edit Attributes** dialog box. The **Modify Poll** dialog box opens.

- Click **Stop**.

The poll also closes if the specified deadline passes or if all participants have voted.

Casting a Vote

Users with the "Read" permission for the Poll class can vote in a poll. Poll participants cast votes from the **Cast Vote** dialog box. Participants typically receive an e-mail message when the poll has started that provides a link that takes them to the **Cast Vote** dialog box. The **Cast Vote** dialog can also be accessed from the **Polls** section of the **Edit Attributes** dialog box or from the List view of Requirements View.



NOTE Before polling e-mail notifications can be sent, an administrator needs to configure and enable the RM Mail service. For information, see the *Dimensions RM Administrator's Guide*.

To cast a vote:

- 1 Do one of the following:
 - Click the link in an e-mail message you received, and then log in to Dimensions RM.
 - Click the **Vote** link from the **Polls** section of the **Edit Attributes** dialog box or List view of Requirements View.

The **Cast Vote** dialog box opens.

- 2 Select a single answer. Before you vote, you can view the details of the requirement for which the poll is being placed, and view the current results of the voting. To do so, click the link at the bottom left of the dialog box.
- 3 If you want, type a comment in the **Additional comment** section.
- 4 Click **Vote**.

Viewing Polling Results

You can view the details of a poll that is in progress or has already completed. The current polling status is displayed after you cast a vote. You can also view the polling status from the **Edit Attributes** dialog box or the List view of Requirements View.

To view polling results:

- 1 Do one of the following:
 - Cast a vote.
 - Click the **View details** link at the bottom of the **Cast Vote** dialog box before you cast your vote.
 - Edit a requirement and display the Edit Attributes dialog box.
 - Navigate to the List view of Requirements View.
- 2 If you used the first method in [Step 1](#), the **Poll Results** dialog box opens.

- 3 If you used the second, third, or fourth method in the preceding step, expand the **Polls** section on the dialog box that opens (if it's not already expanded), and then expand the poll you want to view.
- 4 To view who voted for each answer and their comments, click **Show details**. To hide this information, click **Hide details**.
- 5 To view a list of participants who have not voted yet, click **View users who haven't voted**.

Adding Active Polls to My Work Dashboard

Polls can be viewed using the **Recent Polls** report, a built-in report in the **My Work** dashboard.

To add a built-in report to the My Work dashboard:

- 1 Open the Home View by clicking .
- 2 Select the **Dashboards** tab.
- 3 Select **Add Widget** in the **Dashboard** set of the **Actions** pane.
- 4 In the **Report Type** box, select **My Work**.
- 5 Select **Recent Polls** and click **Save**.

Participating in Discussions

Comments can be added to chapters or requirements. Comments allow to discuss topics regarding a requirement or chapter. Rather than just discussing the topics by e-mail or personally, this allows to review all comments at any time, e.g. during an approval process. For further information about comments, see chapter "[Working with Comments](#)" on page 63.

Chapter 4

Working with Documents

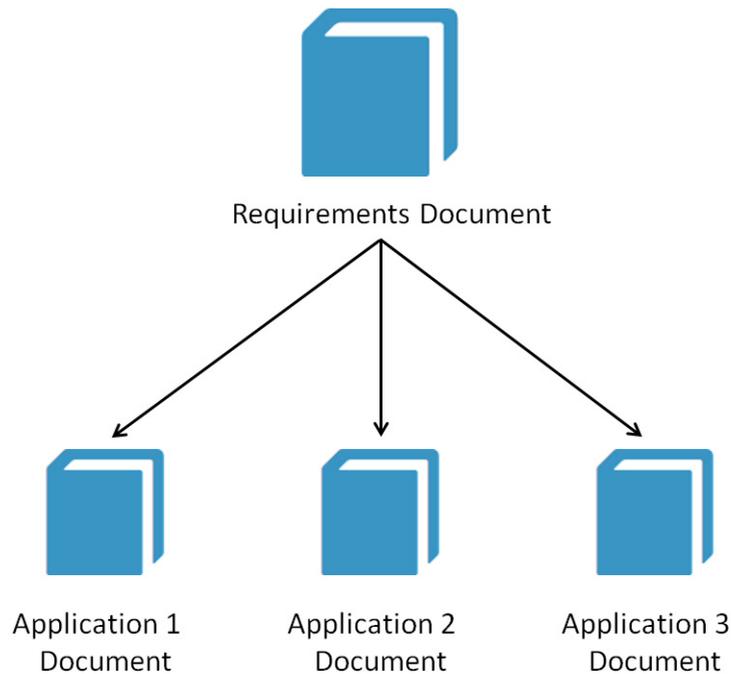
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About Documents

A document is a structure in Dimensions RM which allows to add chapters and requirements. Chapters can contain text requirements. A regular document has all chapters and requirements defined in itself.

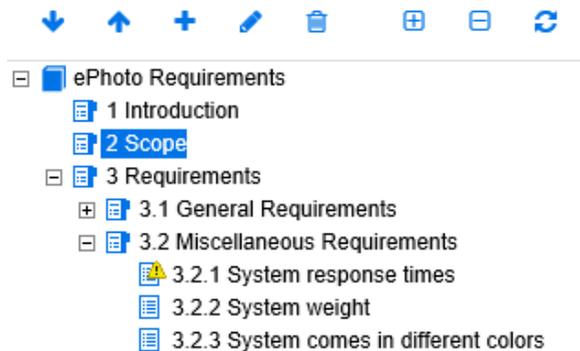
Master and Child Documents

A child document inherits its layout from a master document. Changes to the master document are propagated immediately to any related child document. In a child document, any parts inherited from the master document are read-only and thus cannot be modified. The following image shows a use case for master/child documents.



Document Basics

Navigation Pane



This appears on left side of the page and includes the following elements:

- 
Expand/Collapse: This button expands or collapses the pane.
- 
Down/Up: These buttons move the selected chapter or requirement down or up in the document's structure.
- 
New chapter: This button invokes the New Chapter dialog. The new chapter will be placed at the same level as the currently selected chapter, unless the **Add as subchapter** checkbox is enabled or the root of the document is currently selected. See ["Merging Document Changes" on page 193](#).
- 
Format chapter: This button invokes the **Edit Chapter** dialog or the Edit Document dialog of the selected chapter. The **Edit Chapter** dialog allows you to change title or content of a chapter. In addition, it allows configuration how the chapter is displayed in the Details pane and when published. See ["Editing a Chapter" on page 198](#) and ["Formatting Chapters" on page 201](#).
- 
Delete chapter: This button deletes the currently selected chapter. To complete the operation, click **OK** on the resulting confirmation dialog. See ["Deleting a Chapter" on page 199](#).
- 
Expand all chapters: This button expands all chapters in the document tree.
- 
Collapse all chapters: This button collapses all sub-chapters, leaving only the root-chapters visible.
- 
Reload this document: This button retrieves the currently open document from the server and reloads it into the work page.
- 
Root: This is the root level of the document.
- 
Chapter: This a chapter in the document.
- 
Requirement: This is a requirement in the document.



Requirement with CR: This is a requirement with a CR in state "Proposed".



Suspect Link: This is a requirement that has a suspect link.



NOTE The Foreword, if there is one, is located in the root of the document. It typically contains items such as the company logo, copyright information, and a history table. It does not include the Table of Contents.

When the document is published, the Foreword is displayed before the Table of Contents.

Note the following functional aspects of the Navigation pane:

- Chapters and requirements are automatically numbered using a hierarchical numbered outline format. This numbering updates whenever you change the structure or order of the document's contents.
- To make a requirement a sub-requirement of a requirement, select the requirement's name and drag it to the parent requirement.
- To make a chapter a subchapter of another chapter, select the chapter and drag it to the parent chapter.
- The classes that the document or a chapter can include are displayed as a tool tip when you hover your cursor over the name of the document or chapter.
- The PUID and object ID of each requirement is displayed as a tool tip when you hover your cursor over the requirement name.
- The contents of the element selected in the Navigation pane will be displayed in the Detail pane.

Detail Pane

The look of the Detail pane depends on what element is selected in the Navigation pane, what layout is selected in the Detail pane, as well as the format settings in effect at the document and chapter levels.

If the selected chapter or document root contains:

- **Only requirements**, it can be displayed with either the Grid or Paragraph layouts. The user can switch between the layouts as desired, as well as set the default layout used for a given chapter or the entire document.
- **Only chapters**, it is displayed with the Paragraph layout.
- **Both chapters and requirements**, the chapters are displayed with the Paragraph layout, but the requirements section can be switched between the Grid and Paragraph layouts as desired.

Chapters can be viewed in these modes:

- **Paragraph Layout:** Shows the chapter and requirements in book style.
- **Grid Layout:** Shows the requirements in table format.
- **Editable Grid Layout:** Shows the requirements in table format. In this mode you can edit the displayed attributes without opening the Edit dialog.

- **Form Layout:** This layout is used when you select an individual requirement.

You can switch between **Paragraph**, **Grid** and **Editable Grid** Layout by clicking the link of the desired layout in the **Layout** bar.

For all layouts, except Form Layout, the following controls and features are available:

- **Filtering:** There are 2 types of filtering:
 - It is possible to limit the document display based on a search string; optionally limiting the search to PUID, title or description. When applying the search in **Entire Document View** the option **Show context** may be checked, in order to include the document chapter context in the results.
 - User filters defined in Quick Search can be selected from the box next to the Search button to allow filtering by the settings of that filter.
-  **Scan for glossary entries:** Scans the text for glossary entries. Depending on the Document View mode, scans either the selected chapter or the whole document. Note, that this function is only available if your administrator created the Glossary class as described in the *Administrator's Guide*. For further information on the glossary, see chapter "[Glossary](#)" on page 60.
-  **Entire Document View:** Changes the document view to the Entire Document View, which allows you to scroll through the whole document. See "[Document View Mode](#)" on page 174.
-  **Chapter Content View:** Changes the document view to the Chapter Content view, which allows you to scroll through a chapter only. See "[Document View Mode](#)" on page 174.
-  **Find and replace:** This button invokes the **Find and Replace in Document** dialog so you can search the document or the selected chapter for a string. See "[Finding and Replacing Character Strings](#)" on page 177.
-  **Print:** This button invokes your system's Print dialog to print the current contents of the Details pane. See "[Printing](#)" on page 175.
-  **Refresh:** This button repopulates the Detail pane with fresh data from the database.

The following icons show if the document has changed:

-  **No changes:** The document has not changed since the last visit.
-  **Changed:** The document changed since the last visit.

Clicking the light bulb changes between default filter options and filter options for changes. For further information on document changes, see chapter "[Working with Document Changes](#)" on page 176.

Paragraph Layout

3.2 Miscellaneous Requirements

Requirements

Layout: [Editable Grid](#) | [Grid](#) | [Paragraph](#)

3.2.1 System response times

Suspect: yes **Rqmt ID:** MRKT_000029 **Priority:** High
Time Modified: 30-SEP-2015@01:54:24

The system response time shall not be greater than 3 seconds for 80 percent of the transactions.

3.2.2 System weight

Suspect: no **Rqmt ID:** MRKT_000030 **Priority:** High
Time Modified: 30-SEP-2015@01:54:24

The system shall weigh less than 8 pounds.

3.2.3 System comes in different colors

Suspect: no **Rqmt ID:** MRKT_000031 **Priority:** High
Time Modified: 30-SEP-2015@01:54:24

The system shall be available in a variety of colors.

Paragraph Layout provides all functions from the list on [page 171](#).

To perform an action on a requirement listed in the Paragraph layout, select the requirement and then select the desired action from the **Requirements** group of the **Actions** pane.

Grid Layout

3.2 Miscellaneous Requirements

Requirements

Layout: [Editable Grid](#) | [Grid](#) | [Paragraph](#)

#▲	⚠	Rqmt ID	Title	Text	Priority	Time Modified
3.2.1	⚠	MRKT_000029	System response times	The system response time shall not be greater than 3 seconds for 80 percent of the transactions.	High	30-SEP-2015@01:54:24
3.2.2		MRKT_000030	System weight	The system shall weigh less than 8 pounds.	High	30-SEP-2015@01:54:24
3.2.3		MRKT_000031	System comes in different colors	The system shall be available in a variety of colors.	High	30-SEP-2015@01:54:24

Grid Layout provides all functions from the list on [page 171](#) and in addition:

- **Sorting:** Click a column heading to sort by that attribute.
- **Requirement Editing:** Double click a requirement to open the *Edit* dialog.

To perform an action on a requirement listed in the Grid layout, select the requirement and then click on the desired action from the **Requirements** group of the **Actions** pane.

Editable Grid Layout

3.2 Miscellaneous Requirements

Requirements Layout: Editable Grid | Grid | Paragraph

Row count: 3

#	Rqmt ID	Title	Text	Priority	Time...
3.2.1	MRKT_000029	System response times	The system response time shall not be greater than 3 seconds for 80 percent of the transactions.	High	30-Sep-2015@01:54.24
3.2.2	MRKT_000030	System weight	The system shall weigh less than 8 pounds.	High	30-Sep-2015@01:54.24
3.2.3	MRKT_000031	System comes in different colors	The system shall be available in a variety of colors.	High	30-Sep-2015@01:54.24

Editable Grid Layout provides all functions from the list on [page 171](#) and in addition:

- **Sorting:** Click a column heading to sort by that attribute.
- **Attribute Editing:** Double click the table cell to edit the attribute of the requirement.
- **Requirement Editing:** Double click a requirement to open the *Edit* dialog.

To perform an action on a requirement listed in the Grid layout, select the requirement and then click on the desired action from the **Requirements** group of the **Actions** pane.

Form Layout

3.2.2 System weight



Category: RMDemo/Functional/Design and Construction

STANDARD ATTRIBUTES

Rqmt ID:
MRKT_000030

Title:
System weight

Text:
The system shall weigh less than 8 pounds.

CUSTOM ATTRIBUTES

SYSTEM ATTRIBUTES

ATTACHMENTS

COMMENTS

LINKS

HISTORY

POLLS

CONTAINERS

This layout includes the following controls and features:

- **Propose:** This button invokes the Submit a Change Request dialog so you can propose a change to the currently selected requirement. See "[Submitting a Change Request](#)" on [page 119](#).
- **Refresh:** This button repopulates the Detail pane with fresh data from the database.

- **Edit:** This button invokes the Edit Requirements dialog. See "Editing a Requirement" on page 114.
- **Print:** This button invokes your system's Print dialog to print the current contents of the Details pane. See "Printing" on page 175.



NOTE The contents of the sections in the Form layout are printed only if the sections are expanded.

- To perform an action on the currently selected requirement, select the desired action from the Requirements group of the Actions pane.

Document View Mode

For documents, there are two view modes available: Chapter and Entire Document. The view mode defines how the document is viewed in the detail pane. The Document View Mode can be changed either through Instance Setting/User Setting (see chapter "Default Document View Mode" on page 85) or by clicking  or  in the Detail Pane (see chapter "Detail Pane" on page 170).

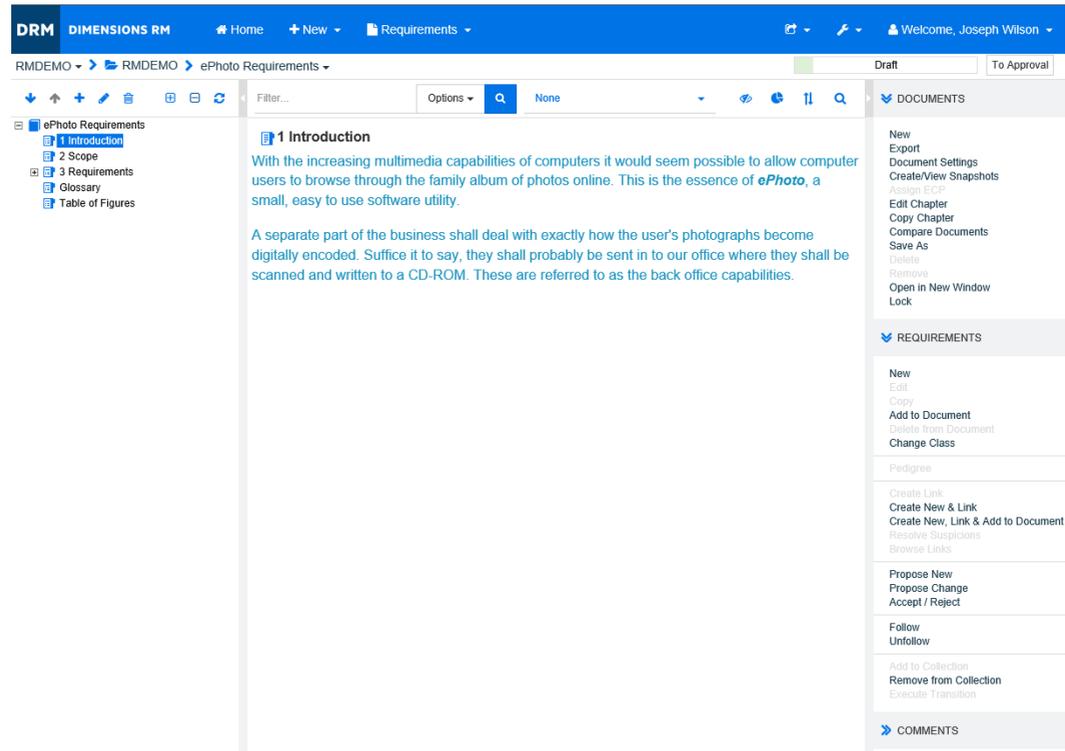


Figure 4-1. Document View Mode: Chapter

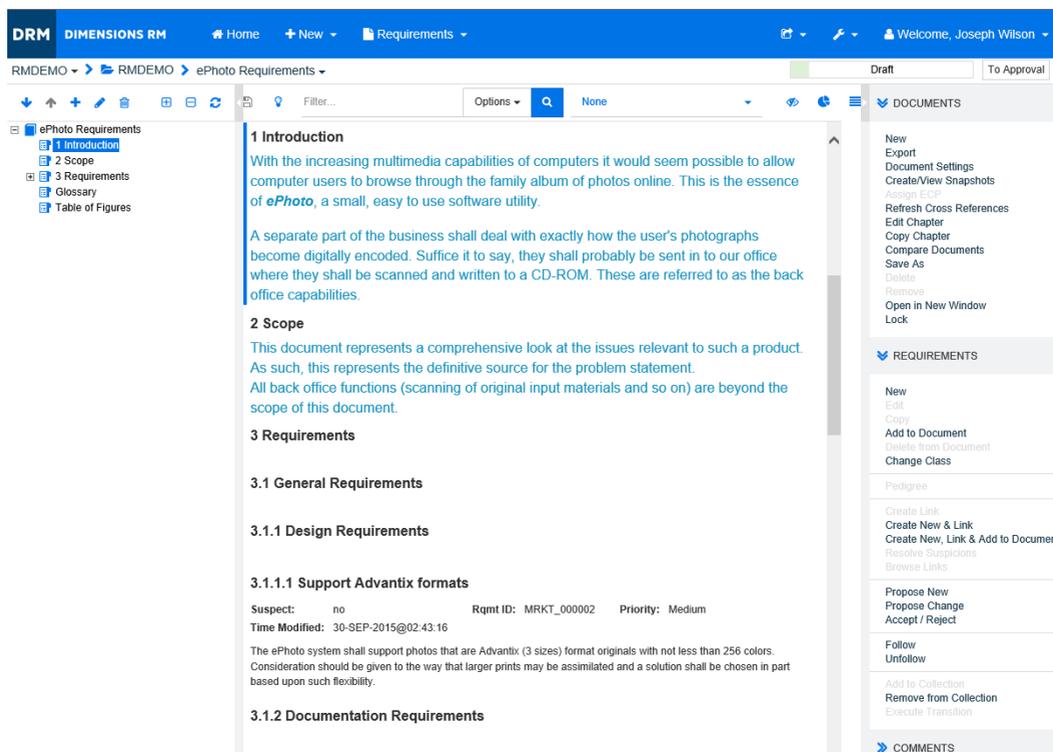


Figure 4-2. Document View Mode: Entire Document

Printing

You can print the contents of the Detail pane when you select a requirement, chapter, or document in the Navigation pane.

To print the contents of the Detail pane:

- 1 Click **Print** in the Detail pane. A window opens with content formatted for printing; the RM controls shown in this window are non-functional.



NOTE The contents of the sections in the Form layout are printed only if the sections are expanded.

- 2 Your system's Print dialog opens. Click **Print**. The requirement is sent to your printer.
- 3 After the content has printed, close the window that displayed the formatted content.

Opening Documents or Snapshots

Opening Documents

To open a document:

- 1 Open the Home View by clicking .
- 2 Select the **Documents** tab.

- 3 If the document resides in a different category, select the category in the category tree.
- 4 Double-click the desired document. This opens the document in the Document View.

Opening Snapshots

To open a snapshot:

- 1 Open the Home View by clicking .
- 2 Select the **Documents** tab.
- 3 Click **Show Snapshots** to show the snapshots column on the Documents tab.
- 4 Double-click the desired snapshot. This opens the snapshot in the Document View.

Opening the Current Document or Snapshot in a New Browser Window

This chapter assumes that you opened the document or snapshot as described in the previous sections.

To open the currently open document/snapshot in a new window:

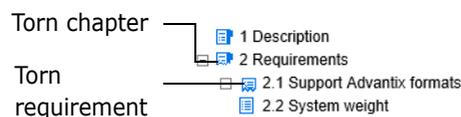
- 1 Click **Open in New Window** from the Documents group in the Actions pane. The document or snapshot opens in a new browser window.

Working with Limited Permissions

If you navigate to a Document work page and one or more of the requirements in the chapter belongs to a class to which you do not have "read" permission, or if one or more requirements belong to a category to which you do not have permission, the following occurs:

- The chapter or requirement icon is displayed as being torn.
 - A torn chapter icon means that the user does not have permission to read one or more requirements within that chapter.
 - A torn requirement icon means that the user does not have permission to read one or more subrequirements under that requirement.
- A message informs you that not all requirements in the document are displayed due to permissions issues.

The following illustration shows this scenario.



Working with Document Changes

When opening a document that has been modified since the last visit, a message shows up that the document has changed. You can easily see the changes done by others users

on the document, but also see the changes done on the requirements outside of the document.

In the toolbar of the document section, the  icon indicates that there are changes. No changes are indicated by . Clicking the icon opens a table that shows the number of changes and the individual changes. In addition, it changes the detail pane to show the following:

- Drop-down list with the following options:
 - **Recent changes:** Show the changes made by other users since you opened the document the last time. This is the default.
 - **Changes since date:** Shows a date selector, which allows you to choose a date.
 - **Changes since snapshot:** Shows a drop-down list with all snapshots of this document along with the date the snapshot was created.
- : Starts the search for the selected options.
- **Show only changes** option: Updates the document tree to show only the changed chapters, requirements, or change requests along with the parent chapters or requirements.

After the search for changes has been executed, you will see a table with the changes (if there are any). To filter the contents of the table, enter text into one or several boxes on the first line of the table. The modified chapter or requirement can be opened by clicking the related entry in the table. Also note that the modified chapters and requirements are highlighted in the document tree.

Finding and Replacing Character Strings

You can find and replace character strings in chapters and requirements in an open document. You can find and replace character strings in the following:

- An entire document or a selected chapter
- Title and Description attributes or all alphanumeric, list or user attributes



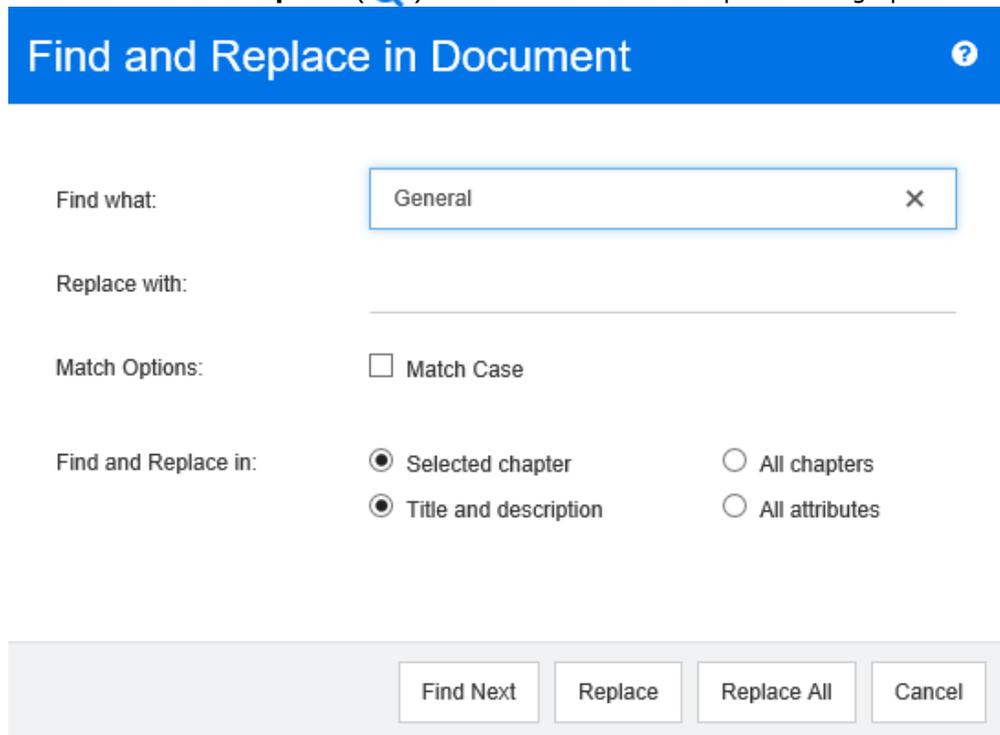
NOTE

- The **Find and Replace** menu item is disabled while you are comparing a document and its snapshot (see "[Comparing Documents and Snapshots](#)" on page 213).
- For read-only objects (snapshots and ECP-controlled documents without an ECP assigned), the **Replace** and **Replace All** buttons are not shown. With these objects, you only Search feature of the dialog works.
- To use the **Replace** and **Replace All** commands, you must have permission to replace a requirement or chapter. If only some attributes can be changed, they are changed, and you receive a message saying that you do not have permission to replace the string in all attributes.

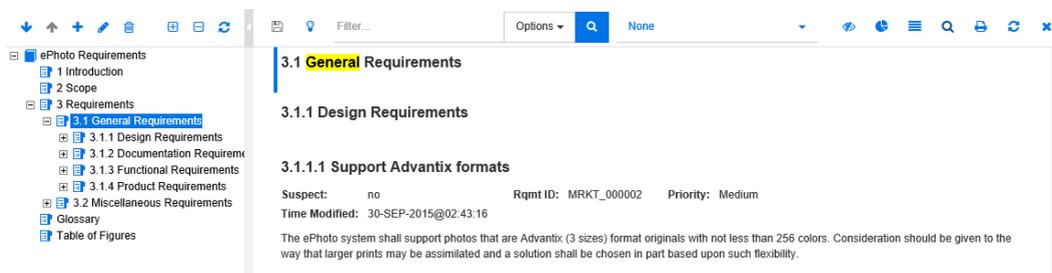
To find and replace character strings:

- 1 Open the document to the Document work page, if it is not already open. See "[Open the Home View by clicking .](#)" on page 175.

- 2 If you wish to search within a specific chapter, select it in the Navigation pane.
- 3 Click the **Find and replace** () button. The Find and Replace dialog opens.



- 4 **Find what:** Enter the string you want to find.
- 5 **Replace with:** If you want to replace the string, enter the replacement string here.
- 6 **Match case:** Enable this check box to include the case of the string in the match criteria.
- 7 Select one of the following:
 - **Selected chapter:** To search only the selected chapter and any subchapters and requirements it contains.
 - **All chapters:** To search all chapters and their contents.
- 8 Select one of the following:
 - **Title and description:** To search only Title and Description attributes.
 - **All attributes:** To search all alphanumeric, list and user attributes.
- 9 Click any of the following buttons:
 - **Find Next:** This button to displays the first chapter or requirement containing one or more instances of the string. The chapter or requirement is selected in the Navigation pane, and the found string is highlighted in the Detail pane. To display the next match, click the button again.



- **Replace:** The chapter or requirement that is currently selected is replaced, and the new version contains the string you specified in the **Replace with** box.
- **Replace All:** This button replaces all chapters and requirements containing the string you specified in the **Find what** field with the string you specified in the **Replace with** field.

The Find and Replace dialog closes, and a "Replacing all strings" message is displayed. After this operation finishes, a dialog displays how many chapters and requirements were replaced and reports any errors.

Moving a Document or Snapshot to a different Category

To move a document to a different category, do the following:

- 1 Open the Home View by clicking .
- 2 Select the **Documents** tab.
- 3 If you want to move a snapshot, click **Show Snapshots**.
- 4 Drag the document or snapshot and drop it at the desired category in the **Categories** tree.

Copying the URL of a Document to the Clipboard

You can copy the URL of a document or snapshot and paste it into a file for future use and reference. When that URL is later invoked, it will open RM Browser to that document or snapshot. See the appropriate section below.

Copying the URL of an Open Document or Snapshot

To copy the URL of an open document or snapshot:

- 1 With the document or snapshot open in a work page, click **Open in New Window** from the Documents group in the Actions pane. The document or snapshot opens in a new browser window.
- 2 Click on and select the URL in the new browser window.
- 3 Press **Ctrl + C**, or right-click on the highlighted URL and select **Copy**. The URL is now on the Windows clipboard.
- 4 Close the new browser window.

- 5 Use **Ctrl + V**, or the relevant application-specific menu command, to paste the URL into the file or application where you wish to use it.

Copying the URL of a Closed Document

To copy the URL of a closed document:

- 1 Open the Home View, if it is not already open. For further information on the Home View, see chapter ["Working with the Home View" on page 227](#).
- 1 Select the **Documents** tab.
- 2 Select the desired document. To open a dependent document, select the dependent document from the child documents column (see chapter ["Documents Tab" on page 236](#)).
- 3 Click **Create direct URL** in the **Documents** group of the **Actions** pane. This opens a dialog with the URL selected.
- 4 Press **Ctrl + C**, or right-click on the highlighted URL and select **Copy**. This copies the URL to the clipboard.
- 5 Click **OK** to close the dialog.
- 6 Use **Ctrl + V**, or the relevant application-specific menu command, to paste the URL into the file or application where you wish to use it.

Copying the URL of a Closed Snapshot from the Home View

To copy the URL of a closed snapshot from the Home View:

- 1 Open the Home View, if it is not already open. For further information on the Home View, see chapter ["Working with the Home View" on page 227](#).
- 2 Select the **Documents** tab.
- 3 If the Snapshot column is not already open, click **Show Snapshots**.
- 4 Select a document with snapshots.
- 5 Select the desired snapshot.
- 6 Click **Create direct URL** from the **Documents** section of the **Actions** pane. This opens a dialog with the URL selected.
- 7 Press **Ctrl + C**, or right-click on the highlighted URL and select **Copy**. This copies the URL to the clipboard.
- 8 Click **OK** to close the dialog.
- 9 Use **Ctrl + V**, or the relevant application-specific menu command, to paste the URL into the file or application where you wish to use it.

Copying the URL of a Closed Snapshot from the Document View

To copy the URL of a closed snapshot from the Document View:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents" on page 175](#).

- 2 Click **Create/View Snapshots** in the Documents group of the Actions pane. The Snapshots dialog opens.
- 3 Right-click the link  icon next to the desired snapshot.
- 4 Select **Copy Shortcut** (or a similar menu item, depending upon the browser you are using). This copies the URL to the clipboard.
- 5 Use **Ctrl + V**, or the relevant application-specific menu command, to paste the URL into the file or application where you wish to use it.

Working with Documents

Creating a New Document

When you create a new document, you can use one of the following as a template:

- The blank template.
- The chapter structure of an existing document.
- The chapter structure and requirements of an existing document.



NOTE

- You must have the "Create" permission for both the chapter class and for collections.
- If you select **Chapters Only** or **Chapters and Requirements** for the Create Options, you must also have the following additional permissions:
 - Chapter class: "Read"
 - Collections: "Link" and "Create Based on Existing Collection"

To create a new document:

- 1 Select **Document** from the New menu. The **New Document** dialog opens.
- 2 **Name:** Enter a name for the document.



NOTE A document name can contain a maximum of 256 characters and cannot include single quotes (').

- 3 **Description:** Enter a description of the document. This description will be shown in the **Document Settings** dialog.



NOTE

- The description is not copied if you are creating a document from an existing document.
- The administrator specifies the maximum length of the **Description** field in the Chapter class in Class Definition.

- 4 **Category:** Select the category to which to add the new document. A document can belong to any category to which you have access.

- 5 Workflow:** Allows to select the workflow to be used with documents. Selecting a workflow loads the attributes (e.g. Reviewer) of the workflow in this dialog. If a workflow has been selected, this will show custom attributes in the **Custom Attributes** section. Depending on the definition of the **Create New** transaction of the workflow, some attributes may be mandatory. Mandatory attributes must be filled out to allow creation of the document.

6 Document Settings:

- a Publish Title:** Select to use the string in the **Name** field as the document's title when publishing to Word.
- b Update To Current (Tip):** Select to automatically update the document with the newest version of each requirement. When creating a document with option "Blank", "Update To Current (Tip)" will be set from the value specified on the form. If a document is created by using a template ("Chapters Only" or "Chapters and Requirements"), then "Update To Current (Tip)" will be set from the template document.



NOTE To manually change the version of a specific requirement that is included in the document, see ["Change which Requirement Version Is Included in a Document" on page 208](#).

- c Glossary:** Select this option to automatically create the chapter "Glossary". This chapter contains the explanations for the terms used in this document.
- d ECP Controlled:** Select this option if you want to require that users link the document to an ECP class object before editing it.



CAUTION! Once ECP Control is enabled on a document, **it cannot be disabled**.



NOTE

- ECPs are a high-level change management class type (Engineering Change Proposal) that can be used to collect multiple change requests into a single package.
- If ECP Control is in effect, but the current user has not assigned an ECP, the document will be Read-Only until he assigns an ECP to it. A notice to this effect will be displayed to the right of the Instance Bread Crumb.
- To assign an ECP, see ["Merging Document Changes" on page 193](#).

- e Master Document:** Select this option to make the document a master document.
- f Table of Figures:** Select this option to automatically create the chapter "Table of Figures". This chapter contains all images or tables with captions (see "Add caption" in chapter ["HTML Text Formatting Toolbar" on page 36](#)). It is updated when a document is opened or reloaded.
- 7 Create Options:** Select one of the following:
- a Blank:** Creates the document from the blank template. When you select this option, the documents in the Template list are disabled. This is the default.
- b Chapters Only:** Creates the document based upon the chapter structure of an existing document that you select from the Template list.

- c **Chapters and Requirements:** Creates the document based upon the chapter structure and requirements of an existing document that you select from the Template list.
- d **Copy Requirements:** This option is only available if the option **Chapters and Requirements** is selected.
With this option is selected, all requirements of the original document will be copied and the copy will be added to the new document. Links between requirements are copied as well if the linked requirements are part of the document.
If this option is not selected, all requirements of the original document will be linked to the new document.
- e **As Child:** Shows a list of master documents to which this newly created child document should relate to.
- f **Based on Sibling:** This option is only available when **As Child** is selected. If you select this option, the master document list contains child documents which you can select. The new child document will be a copy of the selected child document and also have the same master document.
- g **Template:** Select the document to use as the template. If needed, use the **Find template** field at the bottom of the dialog filter the documents shown in the list.

**NOTE**

- These controls are enabled only if you did **NOT** choose **Blank** from the Create Options.
- If you restrict classes in a document, these restrictions are inherited by the new document. For further information about restricting classes in a document see chapter "[Merging Document Changes](#)" on page 193.

- 8 Click **OK**.

Deleting a Document

To delete a document:

- 1 In the Navigation pane of the Document work page, select the root of the document.



NOTE The **Delete** command is only enabled if you have the "Remove" permission for both the Chapter class and for collections.

- 2 Click **Delete** in the Documents group of the Actions pane.
- 3 When prompted, confirm that you want to delete the document.



IMPORTANT! When you delete a document, the document and chapters are deleted, but the requirements are not deleted from the database.

Saving a Copy of a Document Under a New Name

This feature saves a copy of the currently open document under a new name.



PRIVILEGES Save As requires the following permissions:

- Chapter class: "Create" and "Read"
- Collections: "Create," "Link," "Create Based on Existing Collection"

To save a document under a new name:

- 1 Open the document to the Document work page, if it is not already open. See ["Open the Home View by clicking ." on page 175](#).
- 2 Click **Save As** in the Documents group of the Actions pane. The Document Save As dialog opens.
- 3 **Name:** Enter a name for the new copy of the document.
- 4 **Description:** Enter a description of the document.
- 5 **Chapters and Requirements:** Select this option to copy chapters and requirements to the new document.
- 6 **Copy Requirements:** This option is only available if the option **Chapters and Requirements** is selected. With this option is selected, all requirements of the original document will be copied and the copy will be added to the new document. Links between requirements are copied as well if the linked requirements are part of the document.
If this option is not selected, all requirements of the original document will be linked to the new document.
- 7 **Chapters Only:** Select this option to copy only the chapters of the original document (no requirements).
- 8 Click **OK**.

Document Settings

The **Document Settings** dialog provides different tabs which allow you to change various document related settings. To open the **Document Settings** dialog, click **Document Settings** in **Document** section of the **Actions** pane of the Document View.

- **General:** Allows you to change document name, description, and other settings which define the document. For further information, see chapter ["Editing Document Attributes" on page 185](#).
- **Format Document:** Allows you to specify the document layout for a chapter or the whole document. For further information, see chapter ["Formatting Documents" on page 186](#).
- **Display Options:** Allows you to specify the visible attributes when using Grid, Editable Grid, or Paragraph mode (without Template). For further information, see chapter ["Display Options" on page 190](#).
- **Export Options:** Allows you to specify the attributes for each class when exporting the document. For further information, see chapter ["Export Options" on page 191](#).

- **Restrict Classes:** Allows you to specify the classes that can be used with the document. For further information, see chapter ["Restricting Requirement Classes in a Document"](#) on page 191.
- **Dependencies:** Shows the dependencies between a master document and a child document. For further information, see chapter ["Document Dependencies"](#) on page 192.

Editing Document Attributes

These are the attributes from the General, Foreword, and System Attributes tabs of the New Document dialog.

To edit a document's attributes:

- 1 Open the document to the Document View, if it is not already open. See ["Opening Documents or Snapshots"](#) on page 175.
- 2 Click Select **Document Settings** in the **Documents** set of the **Actions** pane. This opens the **Document Settings** dialog.
- 3 Do any of the following as needed:
 - **Name:** Edit the name of the document.
 - **Description:** Edit the description of the document.
 - **Workflow:** Select the workflow to be used with documents. Selecting a workflow loads the attributes (e.g. Reviewer) of the workflow in this dialog. Selecting a workflow may also show the **Custom Attributes** set which allows you to enter or select attributes specific to the document.
 - **Publish Title:** Select to use the string in the Name field as the document title when publishing to Word.
 - **Update To Current (Tip):** Select to automatically update the document with the newest version of each requirement.



NOTE To manually change the version of a specific requirement that is included in the document, see ["Change which Requirement Version Is Included in a Document"](#) on page 208.

- **Glossary:** Select this option to automatically create the chapter "Glossary". This chapter contains the explanations for the terms used in this document.
- **ECP Controlled:** Select this option if you want to require that users link the document to an ECP class object before editing it.



CAUTION! Once ECP Control is enabled on a document, **it cannot be disabled.**



NOTE

- ECPs are a high-level change management class type (Engineering Change Proposal) that can be used to collect multiple change requests into a single package.
- If ECP Control is in effect, but the current user has not assigned an ECP, the document will be Read-Only until he assigns an ECP to it. A notice to this effect will be displayed to the right of the Instance Bread Crumb.
- To assign an ECP, see ["Merging Document Changes" on page 193](#).

- **Master Document:** Select this option to make the document a master document.
- **Table of Figures:** Select this option to automatically create the chapter "Table of Figures". This chapter contains all images or tables with captions (see "Add caption" in chapter ["HTML Text Formatting Toolbar" on page 36](#)). It is updated when a document is opened or reloaded.

- 4 Click **OK**.

Formatting Documents

You can specify whether the document uses the Grid or Paragraph layout. If the document uses the Paragraph layout, you can select a custom template from which to publish the document. You can also number requirements separately from chapters and specify the character string that delineates the two.

To specify document format:

- 1 Open the document to the Document View, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Select the root of the document in the Navigation pane.

- 3 Select **Document Settings** from the **Documents** group of the **Actions** pane. This opens the **Document Settings** dialog.

Document Settings "ePhoto Requirements" ?

GENERAL **FORMAT DOCUMENT** DISPLAY OPTIONS EXPORT OPTIONS RESTRICT CLASSES DEPENDENCIES

Page Orientation on Publish: Inherit from publish template
 Portrait
 Landscape

Click to reset page orientation for all chapters to 'Inherit'.

Requirement Layout: Editable Grid
 Grid
 Paragraph

Show and Publish LABELS for:
 <Default Title>
 <Default Description>

Click to force 'inherit from parent' for all document chapters.

Publish Req. Template: None ▼

Document Numbering: Separate chapters and requirements numbering

.#

Document Tree: Show count of assigned Requirements in chapters title
 Show count of assigned Requirements in chapters tool tip
 Highlight Requirements with change proposals



TIP If you selected a chapter, or a requirement within a chapter, when you opened the **Document Settings** dialog, a **Format currently selected chapter instead** link is displayed. If you wish to format only that chapter, click the link to open the **Format Chapter** dialog.

- 4 **Page Orientation on Publish:** The page orientation setting changes the orientation for the remainder of the document starting from the beginning of the document.
- a **Inherit from publish template:** Uses the same page orientation as specified in the publish template. If no publish template has been specified, the default (portrait) is used.
 - b **Portrait:** Sets the page orientation to portrait.
 - c **Landscape:** Sets the page orientation to landscape.
 - d **Reset all chapters:** Resets the page orientation for all chapters to inherit from the previous chapter. This means that all chapters will use the same orientation as specified with above setting.
- 5 **Requirement Layout:**
- a **Editable Grid:** Requirements are displayed in a table (one requirement per row). When editing a document in RM Browser, you can modify the attributes of a requirement. Only attributes are displayed/published which are specified in the **Display Options** settings (see chapter "[Display Options](#)" on page 190).
 - b **Grid:** Requirement are displayed in a table (one requirement per row). Only attributes are displayed/published which are specified in the **Display Options** settings (see chapter "[Display Options](#)" on page 190).

- c Paragraph:** Requirements are displayed individually. If a publish template for the requirement class exist, the layout is specified in the template. If no publish template exists, only attributes are displayed/published which are specified in the **Display Options** settings (see chapter "[Display Options](#)" on page 190).



NOTE If there is no chapter in a document or if there are mixed requirements from different classes in the same chapter or sub-chapter, the Grid option is disabled.



TIP If you want to include requirements of different classes into the same chapter, put the requirements of each class into a separate sub-chapter.

- 6 Show and publish LABELS for:** The following settings change how attribute labels are shown in the Detail pane and in the published document. They are only relevant when using the **Requirement Layout** option **Paragraph**.
- a <Default Title>:** If selected, the name of title attribute precedes the name of the requirement title, e.g. *Title: Database stores at least 1024 entries*
 - b <Default Description>:** If selected, the name of the description attribute precedes the description, e.g. *Text: The database shall store not less than 1024 entries.*
- 7 Reset all chapters:** This button reverts the *Requirement Layout* and *Show and Publish LABELS for* settings of all chapters in the document to the default of inheriting the settings from their parents.
- 8 Publish Req. Template:** To use a custom template to publish the document, select a template from the list. This list contains templates that your administrator defined. If you select **None**, the standard grid or paragraph format is used.



NOTE To use a custom template, the requirement must be in a chapter that uses paragraph format. If it is in a chapter that uses grid format, the requirement is displayed in the standard grid format.

- 9 Document Numbering:** To change chapter numbering within the document, do the following:
- a To Separate chapters and requirements numbering,** select the check box. Else, any requirements located at the same level in the document as the top-level chapters will be counted as a chapter for numbering purposes. Adding or removing such a requirement would result in the renumbering of all chapters in the document.
 - b To define the Format string** that will be used to display requirement numbers in the document, enter the desired format in this field. The string can be up to 10 characters long. The following characters have special meaning:
 - The number (#) character represents the position of the requirement number. (The number character is known by many names around the world, including: pound, hash, and octothorp.)
 - The caret (^) character serves as an escape symbol. You would use it in front of a # character if you wanted an # character to be displayed rather than representing the position of the requirement number.

The examples below assume two requirements located in a sub chapter numbered 2.1.1.

String	Example Results
.#	2.1.1.1 Mac Support 2.1.1.2 Deadline (This is the default.)
-#	2.1.1-1 Mac Support 2.1.1-2 Deadline
^##	2.1.1#1 Mac Support 2.1.1#2 Deadline
^^#	2.1.1^1 Mac Support 2.1.1^2 Deadline
RQ:#	2.1.1RQ:1 Mac Support 2.1.1RQ:2 Deadline
ReqNumber#	2.1.1ReqNumber1 Mac Support 2.1.1ReqNumber2 Deadline
	Mac Support Deadline NOTE There will be no requirement numbering displayed in the document, document tree, or the grid layout.



NOTE After changing the numbering settings and clicking **OK**, you will be prompted to make a snapshot of the document before the new settings are applied. If you do not wish to make a snapshot, just Cancel the snapshot dialog when it appears.



TIP Click the **Refresh** button to see changes to numbering take effect on the work page.

10 Document Tree: By changing these options you can specify if additional information should be shown in the document tree.

- **Show count of assigned Requirements in chapters title:** Shows the number of requirements in the chapter or sub-chapter after the title.
- **Show count of assigned Requirements in chapters tool tip:** Shows the number of requirements in the chapter or sub-chapter in a tool tip which is displayed if you move the mouse pointer over a chapter title.
- **Highlight Requirements with change proposals:** Changes the color of the requirement icon to orange, if a change proposal with status "Proposed" exists for a requirement.

11 Click **OK**.

Display Options

On the **Display Options** tab of the **Document Settings** dialog, you can specify which attributes are displayed for the requirements in a class.



NOTE These settings are specific to the current document. You must specify properties for each document individually.

To specify document properties:

- 1 Open the document to the Document View, if it is not already open. See ["Opening Documents or Snapshots"](#) on page 175.
- 2 Click **Document Settings** in the **Documents** group of the **Actions** pane. This opens the **Document Settings** dialog.
- 3 Select the **Display Options** tab.

Document Settings "ePhoto Requirements"

GENERAL FORMAT DOCUMENT **DISPLAY OPTIONS** EXPORT OPTIONS RESTRICT CLASSES DEPENDENCIES

Choose a class:

- Selected: Requirements
- Product_Requirements
- Component_Requirements
- Tests
- Defects
- Show more...

ATTRIBUTES TO DISPLAY

- Baseless-
- Collections-
- Containers-
- Documents-
- Snapshots-
- Proposals-
- Links Out-
- Links In-

Suspect
Reqnt ID
Title
Test
Priority
Time Modified

ATTRIBUTES TO DISPLAY IN THE TREE

- Baseless-
- Collections-
- Containers-
- Documents-
- Snapshots-
- Proposals-
- Links Out-
- Links In-

Title

ATTRIBUTES TO DISPLAY IN THE TOOLTIP

- Baseless-
- Collections-
- Containers-
- Documents-
- Snapshots-
- Proposals-
- Links Out-
- Links In-

Reqnt ID

RELATED CLASSES TO AUTO-INCLUDE

Class Name	
Product_Requirements	<input type="checkbox"/>
ECPs ECP_in_MarketingPoints	<input type="checkbox"/>

OPTIONS

Separator: :

Display Length of Test Attributes: 50

Ok Cancel

- 4 In the **Choose a class** list, select the class for which you want to specify properties.
- 5 **Attributes To Display:** To specify the attribute columns to display in the Details pane of the document, see chapter ["Attributes to Display List"](#) on page 34.
- 6 **Attributes to Display in the Tree:** To specify the attributes to display in the Navigation pane of the document, see chapter ["Attributes to Display List"](#) on page 34.
- 7 **Attributes to Display in the Tooltip:** To specify the attributes to display in the Navigation pane tooltips of the document, see chapter ["Attributes to Display List"](#) on page 34.
- 8 **Related Classes to Auto-Include:** By selecting a relationship, linked requirements will be added automatically to the document.
- 9 **Options:**
 - **Separator:** Specifies the separator between attribute values in a tooltip for the selected class.

- **Display Length of Text Attributes:** Changes the maximum display length for text attributes for both, the Navigation pane and tooltips. If the total length of the combined attribute string exceeds this limit, the string will be truncated and end in an ellipsis (...). The default is 50 characters.

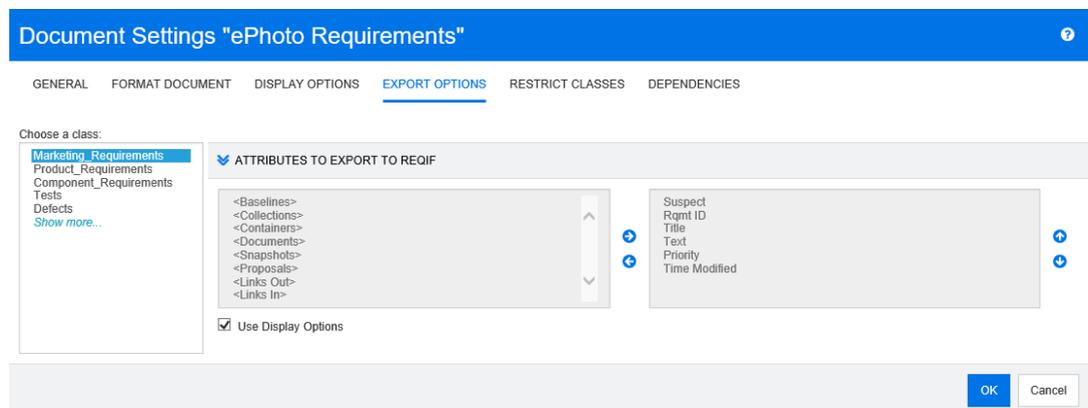
10 Click **OK**.

Export Options

The export options allow to specify the attributes of each class to be exported. By default, the attributes specified in **Display Options** (see chapter "Display Options" on page 190) are exported.

To specify attributes for export:

- 1 Open the document to the Document View, if it is not already open. See "Opening Documents or Snapshots" on page 175.
- 2 Click **Document Settings** in the **Documents** group of the **Actions** pane. This opens the **Document Settings** dialog.
- 3 Select the **Export Options** tab.



- 4 Expand the section for the format you wish export (e.g. **Attributes to export to ReqIF**).
- 5 Clear the **Use Display Options** box.
- 6 Add or remove attributes to the right list (see chapter "Attributes to Display List" on page 34).
- 7 Click **OK**.

Restricting Requirement Classes in a Document

A document may be restricted to allow only certain classes in a document. This setting can be made at any time and has no effect on requirements which exist in the document already. To be able to restrict a document to certain requirement classes, your user account must have the **Create** and **Update Properties** rights for documents.

To restrict certain classes to a document, execute these steps:

- 1 Open the document you want to restrict to the Document View, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Click **Document Settings** in the **Documents** section of the **Actions** pane.
- 3 Select the **Restrict Classes** tab.
- 4 In the **Select Allowed Classes** table, clear the checkboxes of those classes you do not want to be added to the document. To toggle all checkboxes, click the checkbox next to **Name**.
- 5 Click **OK**.



NOTE

- The **Add to Chapter** dialog does not offer restricted classes.
- Documents created on a document with class restrictions inherit those restrictions.

Document Dependencies

A child document depends on a master document. This dependency can be viewed in the **Document Settings** dialog for both, master and child documents.

To review the dependencies between master and child documents:

- 1 Open the master or child document for which you want to show the dependencies to the Document View, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Click **Document Settings** in the **Documents** section of the **Actions** pane.
- 3 Select the **Dependencies** tab.

If the document is a child document, you can change the document to an independent document by clicking  .

Referencing Elements in a Document

When using the Entire Document View, you can create links to chapters, requirements, images, and tables. This allows you to easily navigate to these items. For further

information on how to create references, see chapter "HTML Text Formatting Toolbar" on page 36.



NOTE It is **strongly recommended** to reference tables or images **only in chapters**. Using references in requirements is not recommended for the following reasons:

- When using references in requirements, the reference name (e.g. Table 3) may be correct in one document, but wrong in another (where it may be the first table). This would require to update the references each time the document is published or to change the references in the published document.
- When updating references, a new version of the requirement is created, which could trigger the requirement to become suspect.
- Users must have the right to replace requirements of that class and the category the requirement is located in. If a user does not have the right, the reference is cannot be updated.

When using the **Entire Document** view mode, you can refresh a single reference or all references in a document.

- To refresh a single reference, do the following:
 - a Select the cross reference.
 - b In the HTML text formatting toolbar, open the drop-down menu of the Cross Reference button.
 - c Select **Refresh**
- To refresh all references in the document, select **Refresh Cross References** in the **Documents** section of the **Actions** pane.

Merging Document Changes

The configuration is set through the **Instance Settings** dialog, which is available to administrators. For more information, see the *Dimensions RM Administrator's Guide*.



NOTE RM Browser can be configured to use locking or merging to handle the situation where multiple users edit a requirement or chapter at the same time. This section describes document merging (the "root chapter" of a document is the document itself).

If RM Browser is configured to use merging, document changes must be merged when two users edit the same document at the same time.

Changes can be *automatic* or *conflicting*, as described in the following table.

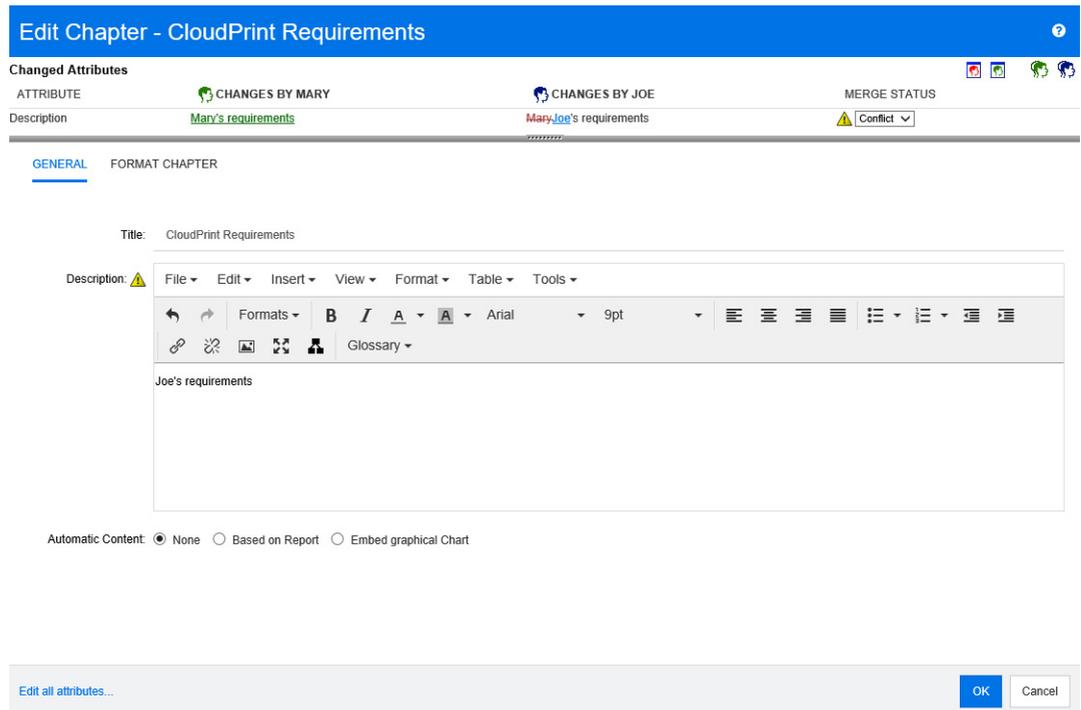
Change Type	Description
Automatic	When the change made by the first user is the same as the change made by the second user or when the change made by the first user is distinct from any change made by the second user, automatic merging can occur because a review of the change is not strictly necessary. However, it is recommended that the second user review the change made by the first user before accepting it.
Conflicting	When the change the second user makes conflicts with the change the first user made, the second user must review the changes and do one of the following: <ul style="list-style-type: none">■ Accept the change the second user made■ Accept the change the first user made■ Accept the original value■ Combine the changes manually by editing the value directly in the main part of the dialog

The following scenario summarizes the actions that lead to document merging.

- 1 Two users edit the same document at the same time.
- 2 The first user clicks **OK** in the **Edit Document** dialog. The **Edit Document** dialog closes.
- 3 The second user clicks **OK** in the **Edit Document** dialog.
- 4 The second user is notified that the first user made one or more changes to the document. The notification either tells the second user that the merge can be done automatically (because the change the first user made does not conflict with the change the second user made) or that the changes conflict and must be resolved before the second user can replace the document.
- 5 The second user clicks **OK** on the notification message. The **Edit Document** dialog becomes the **Merge Document** dialog. The **Merge Document** dialog box differs from the **Edit Document** dialog in that the **Merge Document** dialog:
 - Has a section at the top that summarizes the changes and provides a user interface for merging the changes
 - Has visual indications next to its attributes that identify the type of merge that the second user selected
- 6 The second user uses the merge section at the top of the **Merge Document** dialog to resolve the changes as described in ["Viewing Prior Versions of the Document"](#) on page 195 and ["Merging the Changes"](#) on page 195.

Merge Status

The merge status of the changes made by Mary and Joe are highlighted in the **Changed Attributes** section at the top of the **Merge Document** dialog box.



Mary made the first change when she changed the Foreword to "Mary's requirements" but Joe changed this attribute value to "Joe's requirements." In the **Merge Status** column, **Conflict** is selected in the list. The icon that represents a conflict is a triangle with an exclamation point in it  and is displayed to the left of the **Merge Status** list and to the left of the *Foreword* attribute in the main part of the dialog.

Viewing Prior Versions of the Document

It can be useful to view prior versions of the document before you resolve changes.

The second user can view the original version of the document by clicking the **View original version of the document** button  or by clicking **Original** in the appropriate **Merge Status** column list.

The second user can view the document in the state it was in after the first user made changes but before the second user made changes by clicking the **New version of document prior to your changes** button .

Merging the Changes

After the second user has decided how to resolve the changes, he or she can merge them.

To merge changes:

- 1 If **Automatic** is selected in the **Merge Status** column list, perform one of the following steps:
 - Retain the **Automatic** selection to accept the change.
 - Select the name of the user who made the change to accept the change.

- Select **Original** to restore the attribute to its original value.
- 2 If **Conflict** is selected in the **Merge Status** column list box, perform one of the following steps:
 - Select the name of the user whose change you want to accept.
 - Select **Original** to restore the attribute to its original value.
 - Edit the value manually in the main form so that it matches the value you want to accept.
 - 3 If you want to accept all changes made by particular user (for example, Mary or Joe), click the **Accept all changes by Mary** button  or the **Accept all changes by Joe** button .
 - 4 Click **OK**.

Working with Chapters and Requirements

Creating a New Chapter

You can create a chapter and then add individual requirements to it at a later time, or a chapter may be based on an existing report, including graphical reports. In the case of a report, this may be a one time operation or the chapter can be linked to the report, and then updated along with it.

To create a chapter:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents" on page 175](#).

- Click the **New Chapter** button in the Navigation pane. The **New Chapter** dialog opens.

- In the **Title** field, type the name of the chapter.
- Click in the box under the title. The HTML edit control is displayed. Type the description in the box.
- To hide the chapter number, in the document tree and when publishing, select the **Hide Chapter Number** option. Note that this option is only available if your administrator configured it.
- To populate the content of the chapter based on a report or graphical chart, select either **Based on Report**, or **Embed graphical Chart**.
- Select the report to be imported and used as the basis for the chapter's content. To modify or view the report settings, click  next to the report name.



NOTE If the report returns multiple versions or non-current versions of a requirement, they will be included in the document.

- Optionally select the **Automatic Refresh** option to dynamically refresh the content in the chapter when the report is updated.



NOTE

- If the report specifies requirement version by status (Current, Replaced, etc.), the version(s) included in the document will be updated to reflect whichever version of the requirement is assigned to the specified status.
- If the report specifies a specific object version number, that version of the requirement will remain in the document regardless of changes to its status.

- 9 If you selected a chapter when you clicked **Create**, the **Add as subchapter** check box is enabled. Select this check box if you want to add this chapter as a subchapter of the selected chapter.
- 10 Click **OK**.



NOTE Any chapter created in a master document, will become available in the related child documents immediately.

Editing a Chapter

You can change the name and description of a chapter, and change it to populate its content based on a report.

To change the name and description of a chapter:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Select the chapter in the Navigation pane.
- 3 Click the **Edit** button in the Detail pane. The **New Chapter** dialog opens.



NOTE If the document is a child document, you cannot edit a chapter inherited from the master document.

- 4 Edit the title and description as desired. For information on formatting text, see ["HTML Text Formatting Toolbar" on page 36](#).
- 5 To populate the content of the chapter based on a report or graphical chart, select either **Based on Report**, or **Embed graphical Chart**.
- 6 Select the report to be imported and used as the basis for the chapter's content. To modify or view the report settings, click  next to the report name.



NOTE If the report returns multiple versions or non-current versions of a requirement, they will be included in the document.

- 7 Optionally choose the **Automatic Refresh** checkbox to dynamically refresh the content in the chapter when the report is updated.



NOTE

- If the report specifies requirement version by status (Current, Replaced, etc.), the version(s) included in the document will be updated to reflect whichever version of the requirement is assigned to the specified status.
- If the report specifies a specific object version number, that version of the requirement will remain in the document regardless of changes to its status.

- 8 Click **OK**.



NOTE Clicking **Edit all attributes...** opens the Edit Attributes dialog which provides access to all attributes (also system attributes) as well as the history of changes.

Editing a Chapter in Entire Document View Mode

If a chapter is viewed in "Entire Document" view mode, the method described in chapter ["Editing a Chapter" on page 198](#) also works, but you can take a shortcut to change the chapter title or content.

To quickly change a chapter title, do the following:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 In the detail pane, click the title of the chapter. This shows the HTML editor with **Save** and **Cancel** buttons.
- 3 Edit the title as desired.
- 4 Click **Save**.



NOTE If you leave Document View (e.g. by navigating to the Home View) and there are unsaved changes, you will receive a message that allows you to leave the page (and lose your changes) or to stay on the page (which allows to save the changes).

To quickly change a chapter content, do the following:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 In the detail pane, click the content of the chapter. This shows the HTML editor for that chapter.
- 3 Edit the content as desired.
- 4 Click **Save** in the toolbar of the HTML editor.



NOTE If you leave Document View (e.g. by navigating to the Home View) and there are unsaved changes, you will receive a message that allows you to leave the page (and lose your changes) or to stay on the page (which allows to save the changes).

Deleting a Chapter

To remove a chapter:

- 1 Select the chapter in the navigation tree. To select more than one chapter, click additional chapters while holding the CTRL key.
- 2 Click the **Delete** button.



NOTE If the document is a child document, you cannot delete a chapter from the master document.

- 3 When prompted, confirm that you want to delete the selected chapters.



NOTE

- The selected chapters and any sub chapters are deleted from the document.
- Any requirements in the selected chapter are removed from the document, but not from the RM database.
- The **Delete** command is enabled only if you have the *Remove* permission for the Chapter class.

Copying Chapters

In the Document View, you can copy a chapter either from the current document to another document and vice versa. For both copy directions, the following options are available in the **Create Options** section:

- **Include Subchapters:**
 - When **enabled**, the selected chapter and all sub-chapters (all levels) will be copied.
 - If **disabled**, only the selected chapter will be copied.
- **Include Requirements:**
 - When **enabled**, any requirements of the selected chapter (and sub-chapters if **Include Subchapters** is enabled) will be added as well.
 - If **disabled**, no requirements will be added.
- **Copy Requirements:** This option is only available if **Include Requirements** is **enabled**.
 - When **enabled**, the requirements will be copied, meaning that new requirements (with different IDs than the original requirements) will be created.
 - If **disabled**, the existing requirements will be used.

Copying a Chapter to Another Document

Executing the steps below will copy a chapter from the currently open document into another document. The chapter will be added to the end of the other document.

To copy a chapter to another document, do the following:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Select the chapter you want to copy.
- 3 Click **Copy Chapter** in the **Documents** section of the **Actions** pane. This opens the **Copy Chapter** dialog.
- 4 Ensure that the **Copy Direction** box shows **Copy to Document**.
- 5 From **Create Options**, enable or disable the desired options (see chapter ["Copying Chapters" on page 200](#)).

- 6 From the **Document** box, select the document you wish to copy the chapter to. To find the document more easily, you can filter the document list by typing part of the document name in the text box above the list.

To open the selected document in a different tab or window, click .

- 7 Click **OK**.

Copying a Chapter from Another Document

Executing the steps below will copy a chapter from another document into the currently open document.

To copy a chapter from another document, do the following:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Select the location where you want the chapter to be inserted.
Selecting the root in the document tree will insert the chapter as the last chapter.
Selecting a chapter will insert the chapter as a sub-chapter.
- 3 Click **Copy Chapter** in the **Documents** section of the **Actions** pane. This opens the **Copy Chapter** dialog.
- 4 From the **Copy Direction** box, select **Copy from Document**.
- 5 From **Create Options**, enable or disable the desired options (see chapter ["Copying Chapters" on page 200](#)).
- 6 From the **Document** box, select the document you wish to copy the chapter from. This will show the **Select Chapter** section, which allows you to select a chapter from the selected document.
- 7 Click **OK**.

Formatting Chapters

For formatting the root chapter (which includes the foreword), see chapter ["Formatting Documents" on page 186](#).

To specify the layout you want for a chapter:

- 1 Click the **Edit chapter** () button. This opens the **Edit Chapter** dialog.

- 2 Select the **Format Chapter** tab.

Edit Chapter - Scope ?

GENERAL **FORMAT CHAPTER**

Page Orientation on Inherit from previous chapter
 Publish: Portrait
 Landscape

Inherit: Inherit Layout from Parent

Requirements Layout: Editable Grid
 Grid
 Paragraph

Show and publish <Default Title>
 LABELS for: <Default Description>

Note: All other Attribute Labels are shown and published

Edit all attributes... OK Cancel

- 3 **Page Orientation on Publish:** The page orientation setting changes the orientation for the remainder of the document starting with the selected chapter.
- a **Inherit from previous chapter:** Uses the same page orientation as the chapter that was published before the selected chapter.
 - b **Portrait:** Sets the page orientation to portrait.
 - c **Landscape:** Sets the page orientation to landscape.
- 4 **Inherit Layout from Parent:** Selecting this check box reverts the *Requirement Layout* and *Show and Publish LABELS for* settings of the chapter to the default of inheriting the settings from its parent.
- 5 **Requirement Layout:**
- a **Editable Grid:** Requirements are displayed in a table (one requirement per row). When editing a document in RM Browser, you can modify the attributes of a requirement. Only attributes are displayed/published which are specified in the **Display Options** settings (see chapter "[Display Options](#)" on page 190).
 - b **Grid:** Requirement are displayed in a table (one requirement per row). Only attributes are displayed/published which are specified in the **Display Options** settings (see chapter "[Display Options](#)" on page 190).
 - c **Paragraph:** Requirements are displayed individually. If a publish template for the requirement class exist, the layout is specified in the template. If no publish template exists, only attributes are displayed/published which are specified in the **Display Options** settings (see chapter "[Display Options](#)" on page 190).



NOTE If there are mixed requirements from different classes in the same chapter or sub-chapter, the Grid option is disabled.



TIP If you want to include requirements of different classes into the same chapter, put the requirements of each class into a separate sub-chapter.

- 6 **Show and publish LABELS for:** The following settings change how attribute labels are shown in the Detail pane and in the published document. They are only relevant when using the **Requirement Layout** option **Paragraph**.
 - a **<Default Title>:** If selected, the name of title attribute precedes the name of the requirement title, e.g. *Title: Database stores at least 1024 entries*
 - b **<Default Description>:** If selected, the name of the description attribute precedes the description, e.g. *Text: The database shall store not less than 1024 entries.*
- 7 Click **OK**.

Adding Requirements to a Document

To add a requirement, you search for existing requirements and then add them to a chapter or document. If a requirement is selected when you issue the **Add** command, you have the option of adding the requirements that are returned as subrequirements of the selected requirement.

To add requirements:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents" on page 175](#).
- 2 In the Navigation pane, select the chapter to which you want to add the requirements.
- 3 Click **Add to Chapter** in the Requirements group of the Actions pane. The **Add to Chapter** dialog opens.
- 4 Select a class in the **Look for class** list.
- 5 **Filters:** If you saved filters in Quick Search, you can use these filters to search the requirement you wish to add.
- 6 **Constraints:** As needed, specify criteria to locate the desired requirements. See ["Attribute Constraints Tab" on page 43](#) and ["Relationship Constraints Tab" on page 49](#).
- 7 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 52](#).
- 8 Select the **Case sensitive search** check box if you want the search results to exactly match the capitalization of the specified attribute values.
- 9 **Find Now:** Click this button to run the search. The results are displayed in the lower pane of the dialog.
- 10 **New Search:** Click this button to clear the current search criteria and results.

- 11 Select the desired requirements in the search results. For multi-selection of requirements, see chapter ["Selecting Multiple Requirements" on page 33](#).



NOTE

- A chapter icon is displayed next to a requirement if the requirement is in the chapter (including the root of the document) to which you are adding requirements.
- A document icon is displayed next to a requirement if the requirement is included in the document but is not in the chapter to which you are adding requirements.

- 12 **Add as subrequirement:** Select this checkbox if you want the requirements to be added as subrequirements of the requirement currently selected in the Navigation pane. This checkbox is available only if a requirement is selected in the Navigation pane.
- 13 Do any of the following:
 - **Add:** Click this button to add the selected requirements to the document.
 - **Remove:** Click this button to remove the selected requirements from the document.



TIP To manually change the version of a specific requirement that is included in the document, see ["Change which Requirement Version Is Included in a Document" on page 208](#).

Deleting a Requirement from a Document

To delete a requirement from a document:

- 1 In the Navigation pane of the Document work page, select the requirement you wish to remove from the document. To select more than one requirement, click additional requirements while holding the CTRL key.
- 2 Click **Delete** from Requirements group of the Actions pane. The **Delete from Document** dialog box opens.
- 3 If you also want to delete the requirement from the instance, select the **Also delete from instance** check box.
- 4 Click **Yes** to confirm that you want to delete the requirement.

Moving Chapters and Requirements

You can move chapters or requirements in a document by using drag and drop. For all drag and drop operations, these rules apply:

- You cannot drop a chapter onto a requirement.
- When dropping chapters or requirements onto a chapter, they become children of that chapter. The new children are inserted before any existing children.
- When dropping requirements onto a requirement, they become children of that requirement. The new children are inserted before any existing children.

- Dropping chapters or requirements in-between chapters or requirements inserts them at that location.
- When dropping chapters or requirements, the original sequence of the selected chapters or requirements is maintained.
- If automatic numbering is enabled, moving chapters or requirements changes the numbering of the moved chapters or requirements and all subsequent chapters or requirements.

To move a single chapter or requirement:

- 1 Select a chapter or requirement.
- 2 Do one of the following:
 - Click  or .
 - Drag the chapter or requirement and drop it at its new location.

To move several chapters:

- 1 Select a chapter.
- 2 Do one of the following:
 - Shift-click a chapter: This selects all chapters between the chapter selected in step 1 and the shift-clicked chapter (including it).
 - Ctrl-click one or several chapters: This adds the chapters you Ctrl-clicked to the selection.
- 3 Drag one selected chapter and drop it at its new location.

To move several requirements:

- 1 Select a requirement.
- 2 Do one of the following:
 - Shift-click a requirement: This selects all requirements between the requirement selected in step 1 and the shift-clicked requirement (including it).
 - Ctrl-click one or several requirements: This adds the requirements you Ctrl-clicked to the selection.
- 3 Drag one selected requirement and drop it at its new location.

**TIPS**

- Ctrl-clicking a selected chapter or requirement removes it from the selection.
- If you have a large block of chapters or requirements with just some exclusions, it may be quicker to select the block with Shift-click and deselecting some chapters or requirements with Ctrl-click rather than Ctrl-clicking all chapters or requirements you want to move.

Proposing Changes to a Chapter

Even if you do not have the right to create or edit chapters, you can request a change on a chapter if you have the "CreateCR" right for classes and the "Update" right for attributes.

To propose a change, do the following:

- 1 Select the chapter you want to propose a change for.
- 2 Click **Propose Change** from the **Requirements** group of the **Actions** pane. This opens the **Propose a Change** dialog.
- 3 Modify the Title and/or Chapter Description texts as desired.
- 4 Enter the reason for the change in the **Reason for change** box.
- 5 **Exchange in:** You can select this checkbox to replace the version in the document with the new version.
- 6 **Close after save:** Select this checkbox to close the change request after saving it. Otherwise, the change request opens for editing after you save it. **Close after save** is not available if the navigation bar is visible.
- 7 Click **Submit** to submit the change request. The change request opens for editing if the **Close after save** checkbox is not selected.

Converting Chapters into Requirements

A chapter can be converted into a requirement. However, note that you cannot convert a requirement into a chapter. This means that once you converted the chapter into a requirement, you cannot convert it back. In this case you would have to create a chapter and copy the title and content.

To convert chapters into requirements, do the following:

- 1 Select one or several chapters you want to convert.
A chapter can only be converted if:
 - it does not have any sub-chapters; but it may have requirements linked to it;
 - it does not belong to a master document.
- 2 Click **Change Class** in the **Requirements** group of the **Actions** pane. This opens the **Change Class** dialog.
- 3 From the **New Class** box, select the class you want to convert the chapter to. If you selected several chapters, all chapters will be converted into the selected class.
- 4 Click **Next**.
- 5 Fill out any attributes and/or change the category as desired or required.
- 6 Click **Save**. This opens the **Changed** dialog which gives you an overview about the changed chapters. By clicking the **Req ID** link of a chapter, you open the original version. By clicking the **New ID** link, the current requirement version opens for editing. For further information about editing requirements, see chapter ["Editing a Requirement" on page 114](#).

7 Click **Close**.**NOTE**

- The Title and Description attributes are transferred to the corresponding Title and Text attributes (the names depend on the target class) automatically.
- After conversion, the requirement may not be at the same position as before. This is because sub-chapters must follow the requirement of the parent chapter.
- If the Workflow feature is enabled for the target class, the requirement will always be created with the **New** transition.

Assigning an ECP to a Document

ECPs are a high-level change management class type (Engineering Change Proposal) that can be used to collect multiple change requests into a single package.

If ECP Control is enabled on the document, the name of current ECP is displayed to the right of the Instance Bread Crumb.

RMDEMO > > RMDEMO > ePhoto Requirements > ECP-00001 (Changes to Support Advantix Prints)

If ECP Control is in effect, but the current user has not assigned an ECP, the document will be Read-Only until he assigns an ECP to it. Instead of the name of an ECP, you will see this message: **(No ECP, document is read-only)**.



NOTE To enable ECP Control on a document, see ["Editing Document Attributes" on page 185](#).

To assign an ECP:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents" on page 175](#).
- 2 Click **Assign ECP** in the Documents group of the Actions pane. The Assign ECP dialog opens.
- 3 Select **ECPs** in the **Look for class** list.
- 4 **Filters:** If you saved filters in Quick Search, you can use these filters to search the ECPs.
- 5 **Constraints:** As needed, specify criteria to locate the desired ECP. See ["Attribute Constraints Tab" on page 43](#) and ["Relationship Constraints Tab" on page 49](#).
- 6 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 52](#).
- 7 Select the **Case sensitive search** check box if you want the search results to exactly match the capitalization of the specified attribute values.
- 8 **Find Now:** Click this button to run the search. The results are displayed in the lower pane of the dialog.
- 9 **New Search:** Click this button to clear the current search criteria and results.
- 10 Select the desired ECP in the search results.

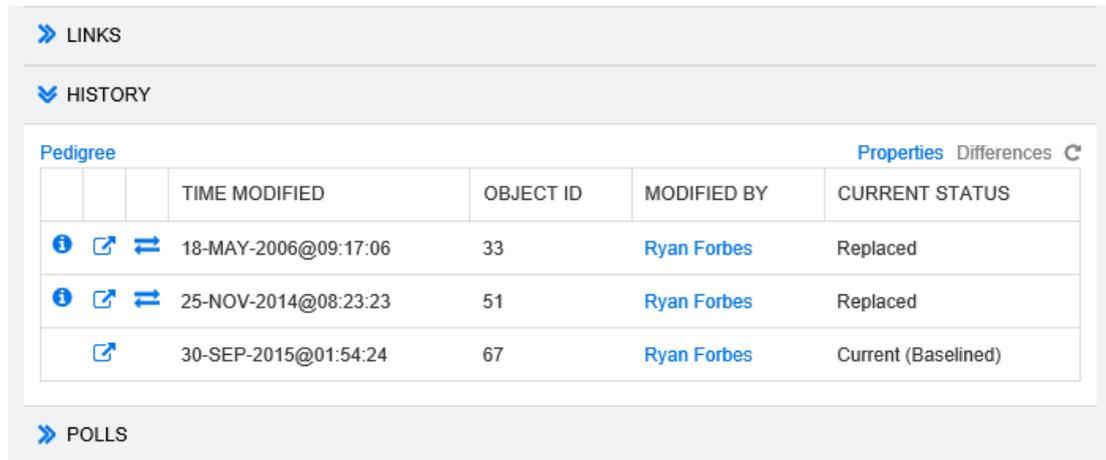
- 11 Do any of the following:
 - **Assign:** Click this button to assign the selected ECP to the document.
 - **Clear:** Click this button to remove the selected ECP from the document.

Change which Requirement Version Is Included in a Document

You can swap the version of a requirement currently in use in a document for another version of the requirement.

To change which requirement version is included in a document:

- 1 In the Navigation pane of the Document work page, select the requirement you wish to change.
- 2 Expand the **History** section of the requirement in the Detail pane.



The screenshot shows a 'Pedigree' table with columns: TIME MODIFIED, OBJECT ID, MODIFIED BY, and CURRENT STATUS. The table lists three versions of a requirement. The first two versions are 'Replaced', and the third is 'Current (Baselined)'. The 'Exchange' icon (two blue arrows) is present next to the first two versions, indicating they can be swapped with the current version.

	TIME MODIFIED	OBJECT ID	MODIFIED BY	CURRENT STATUS
	18-MAY-2006@09:17:06	33	Ryan Forbes	Replaced
	25-NOV-2014@08:23:23	51	Ryan Forbes	Replaced
	30-SEP-2015@01:54:24	67	Ryan Forbes	Current (Baselined)

The version in use by the document will not have an Exchange () icon (nor will rejected versions).

- 3 Click  of the version you want to use in the document. This opens the **Exchange Requirement** dialog.
- 4 Click **Yes** to confirm the change.

Merging Chapter Changes

The configuration is set through the **Instance Settings** dialog box, which is available to administrators. For more information, see the *Dimensions RM Administrator's Guide*.



NOTE RM Browser can be configured to use locking or merging to handle the situation where multiple users edit a requirement or chapter at the same time. This section describes chapter merging.

If RM Browser is configured to use merging, chapter changes must be merged when two users edit the same chapter at the same time.

Changes can be *automatic* or *conflicting*, as described in the following table.

Change Type	Description
Automatic	When the change made by the first user is the same as the change made by the second user or when the change made by the first user is distinct from any change made by the second user, automatic merging can occur because a review of the change is not strictly necessary. However, it is recommended that the second user review the change made by the first user before accepting it.
Conflicting	When the change the second user makes conflicts with the change the first user made, the second user must review the changes and do one of the following: <ul style="list-style-type: none"> ■ Accept the change the second user made ■ Accept the change the first user made ■ Accept the original value ■ Combine the changes manually by editing the value directly in the main part of the dialog box.

The following scenario summarizes the actions that lead to chapter merging.

- 1 Two users edit the same chapter at the same time.
- 2 The first user clicks **OK** in the **Edit Chapter** dialog.
- 3 The second user clicks **OK** in the **Edit Chapter** dialog.
- 4 The second user is notified that the first user made one or more changes to the chapter. The notification either tells the second user that the merge can be done automatically (because the change the first user made does not conflict with the change the second user made) or that the changes conflict and must be resolved before the second user can replace the chapter.
- 5 The second user clicks **OK** on the notification message. The **Edit Chapter** dialog becomes the Merge Chapter dialog. The **Merge Chapter** dialog differs from the **Edit Chapter** dialog in that the **Merge Chapter** dialog:
 - Has a section at the top that summarizes the changes and provides a user interface for merging the changes
 - Has visual indications next to its attributes that identify the type of merge that the second user selected
- 6 The second user uses the merge section at the top of the **Merge Chapter** dialog to resolve the changes as described in ["Viewing Prior Versions of the Chapter" on page 210](#) and ["Merging the Changes" on page 210](#).

Merge Status

The merge status of the changes made by Joe and Mary are highlighted in the **Changed Attributes** section at the top of the **Merge Chapter** dialog.

The screenshot shows the 'Edit Chapter - Scope' dialog box. At the top, there is a blue header bar with the title 'Edit Chapter - Scope'. Below this, the 'Changed Attributes' section is visible. It has columns for 'ATTRIBUTE', 'CHANGES BY JOE', 'CHANGES BY MARY', and 'MERGE STATUS'. The 'Title' attribute is highlighted in green, with 'Document Scope' under 'Attribute', 'Scope of Document Scope' under 'Changes by Joe', and 'Conflict' under 'Merge Status'. The 'Description' attribute is highlighted in blue, with 'None' under 'Attribute', and 'Automatic' under 'Merge Status'. Below the 'Changed Attributes' section, there are tabs for 'GENERAL' and 'FORMAT CHAPTER'. The 'GENERAL' tab is selected, showing the 'Title' field with a warning icon and the text 'Scope of Document'. Below this is a rich text editor with a menu bar (File, Edit, Insert, View, Format, Table, Tools) and a toolbar with various icons. The text in the editor is: 'This document represents a comprehensive look at the issues relevant to such a product. As such, this represents the definitive source for the problem statement. All back office operations (scanning of original input materials and so on) are beyond the scope of this document.' At the bottom of the dialog, there are radio buttons for 'Automatic Content': 'None' (selected), 'Based on Report', and 'Embed graphical Chart'. At the very bottom, there is a bar with 'Edit all attributes...' on the left and 'OK' and 'Cancel' buttons on the right.

Joe made the first change when he changed the *Title* attribute from "Scope" to "Document Scope." This change involves a conflict, because Mary changed the *Title* attribute from "Scope" to "Scope of Document." In the **Merge Status** column, **Conflict** is selected in the list. The icon that represents a conflict is a triangle with an exclamation point in it  and is displayed to the left of the **Merge Status** list and to the left of the box in the main part of the dialog.

Mary made the second change when she changed "office functions" to "office operations." In the **Merge Status** column, **Automatic** is selected in the list, because the change does not involve a conflict with a change that Joe made. The icon that represents an automatic merge is a diamond shape with a merge arrow in it  and is displayed to the left of the **Merge Status** list and the box in the main part of the dialog.

Viewing Prior Versions of the Chapter

It can be useful to view prior versions of the chapter before you resolve changes.

- The second user can view the original version of the chapter by clicking the **View original version of the chapter** button  or by clicking **Original** in the appropriate **Merge Status** column list.
- The second user can view the chapter in the state it was in after the first user made changes but before the second user made changes by clicking the **New version of chapter prior to your changes** button .

Merging the Changes

After the second user has decided how to resolve the changes, he or she can merge them.

To merge changes:

- 1 If **Automatic** is selected in the **Merge Status** column list box, perform one of the following steps:
 - Retain the **Automatic** selection to accept the change.
 - Select the name of the user who made the change to accept the change.
 - Select **Original** to restore the attribute to its original value.
- 2 If **Conflict** is selected in the **Merge Status** column list box, perform one of the following steps:
 - Select the name of the user whose change you want to accept.
 - Select **Original** to restore the attribute to its original value.
 - Edit the value manually in the main form so that it matches the value you want to accept.
- 3 If you want to accept all changes made by a particular user (for example, Joe or Mary), click the **Accept all changes by Joe** button  or the **Accept all changes by Mary** button .
- 4 Click **OK**.

Working with Comments

Comments can be added to chapters or requirements. Comments allow to discuss topics regarding a requirement or chapter. Rather than just discussing the topics by e-mail or personally, this allows to review all comments at any time, e.g. during an approval process. For further information about comments, see chapter ["Working with Comments" on page 63](#).

Working with Snapshots

Creating a Snapshot of a Document

A snapshot is a read-only copy of a document. It preserves the current state of the document for future reference. While creating a snapshot, you can also create a baseline of the requirement versions currently in the document.

**NOTE**

- When you create a snapshot of a document, the settings specified in the Properties dialog box are maintained.
- To create a snapshot, you must have the "Create Baseline" permission for collections.

To create a snapshot of a document:

- 1 Open the document to the Document work page, if it is not already open. See "Opening Snapshots" on page 176.
- 2 Click **Create/View Snapshots** in the Documents group of the Actions pane. The **Snapshots** dialog opens.
- 3 Click the **New Snapshot** button. The **Create Snapshot** dialog opens.
- 4 **Name:** Initially this field will contain the name of the original document. Modify it as needed.
- 5 **Major version** and **Minor version:** Increase the version number snapshot name. Any modifications will be overwritten.

Example:

Assuming the snapshot version is 1.1:

- **Major version** will increase it to 2.0.
- **Minor version** will increase it to 1.2.

- 6 **Description:** Initially this field will contain the description of the original document. Modify it as needed.
- 7 **Workflow:** Allows to select the workflow to be used with this snapshot.
- 8 **Automatically create corresponding Baseline:** Enable this checkbox if you want to create a baseline of the requirement versions currently in the document.



NOTE The baseline creation process runs in the background and is likely still in progress after the snapshot creation process has completed. No notice will appear upon either completion or failure of the baseline creation process.

- 9 Click the **OK** button in the **Create Snapshot** dialog.
- 10 Click the **Close** button in the **Snapshots** dialog.

Working with Snapshots of an Open Document

To access a snapshot follow these steps:

- 1 With the document open in the Document work page, click **Create/View Snapshots** in the Documents group of the Actions pane. The **Snapshots** dialog opens.
- 2 Select the desired snapshot from the list.
- 3 Click one of the following buttons:
 - **Open:** The snapshot opens in the Document work page.
 - **Edit:** The **Modify Snapshot** dialog opens. Do one of the following and click **Save** when you completed your modifications:
 - Modify the **Name** and **Description** fields as needed.
 - Select a workflow from the **Workflow** list as needed.

- **Remove:** This opens the **Remove Snapshot** dialog. Click **OK** to delete the snapshot.



TIP You can also directly open snapshots from the **Documents** tab of the Home View. See ["Working with Snapshots of a Closed Document"](#) on page 213.

Working with Snapshots of a Closed Document

To access a snapshot follow these steps:

- 1 Select the document of the desired snapshot in the **Documents** tab of the Home page.
- 2 Click **Show Snapshots** if snapshots are not already visible.
- 3 Select the desired snapshot.
- 4 Click one of the following in the Actions pane:
 - **View/Edit:** The snapshot opens in the Document work page.
 - **Publish:** The Publish Document dialog prompts you to choose in which format you want to publish the document. Choose **Word Document (*.docx)** or **PDF document (*.pdf)** and click **Publish**. When prompted by your browser, click **Save** to save the file to your local system. See ["Restricting Requirement Classes in a Document"](#) on page 191 for more information on publishing.
 - **Save As:** Saves the selected snapshot as a new document.
 - **Delete:** Click **OK** on the resulting confirmation dialog. The snapshot is deleted.

Comparing Documents and Snapshots

You can compare a document and one of its snapshots or compare two snapshots of the same document. The differences are flagged in the Navigation and Detail panes.

To compare documents and snapshots:

- 1 Open the document or snapshot to the Document work page, if it is not already open. See ["Opening Documents or Snapshots"](#) on page 175.
- 2 Click **Compare Document** in the Documents group of the Actions pane. The Compare Snapshots dialog opens.
- 3 **Select document:** This field displays the name of the document, or the parent document of the snapshot, that was open when the dialog was invoked. If needed, click the Browse (...) button to select a different document.

When selecting a different document, the document itself and the snapshots of that document are added to the document version list. You can then select the document or snapshots for comparison.
- 4 **Select document versions to compare:** Do the following:
 - a Select the snapshot or document to use as the base of the comparison and click the **Set Base Document** arrow button to populate the **Base version** field.

- b Select the snapshot or document that you want to compare to the base and click the **Set Changed Document** arrow button to populate the **Changed version** field.
- 5 Click the **Compare** button. The Compare Snapshots dialog closes.
- The Navigation pane of the Document work page now contains the union of all of the chapters in the two documents, and the detail pane contains a **Requirement Difference Summary**. See ["Working with the Requirement Difference Summary" on page 214](#).

Working with the Requirement Difference Summary

The **Requirement Difference Summary** is a special chapter that is displayed before all other chapters in the Navigation pane. When this chapter is selected, the Detail pane contains five sections: **Added Requirements**, **Removed Requirements**, **Moved Requirements**, **Changed Requirements**, and **Unchanged Requirements**. Each section contains three columns: **Rqmt ID**, **Title**, and **Class**.

To work with the Requirement Difference Summary:

- 1 Click the **Requirement Difference Summary** node in the Navigation pane.
 - Icons in the Navigation pane indicates if a given chapter or requirement was added, removed, moved, changed, or unchanged.
 - At the chapter level, the change icons account only for the chapter description, not for the requirements in the chapter. Therefore, if a description of a chapter did not change, but subchapters or requirements in the chapter changed, the chapter icon indicates that the chapter is unchanged.
 - If the title of a chapter or requirement is different in the two documents, both titles are displayed in the Navigation pane.
 - When a chapter is selected in the Navigation pane, the Detail pane shows requirements in the grid view.



NOTE The attributes shown are those defined for display in the document. See ["Display Options" on page 190](#).

- Only those attributes that were selected in the **Properties** dialog box are shown.
- The icon that indicates whether the requirement was added, removed, moved, changed, or unchanged is also shown in the grid view.
- When you select a changed requirement in the Navigation pane:
 - The Detail pane shows the differences between the two versions.
 - For HTML-enabled text attributes, only the textual differences are shown in the Detail pane. The HTML tags are removed from the attribute and then the attributes are compared.
 - An icon is displayed next to the sections in the Detail pane that include changed attributes, and the sections that include changed attributes are expanded.
- The comparison is relative to the base version, especially for moved requirements (requirements that have been added and removed as a result of a drag-and-drop operation).

Publishing the Document Differences Report

The **Publish** command lets you publish a Microsoft Word document from the Document work page, as described in "[Publish as a Microsoft Word Document](#)" on page 215. However, the Table of Contents will have **[ADDED]**, **[REMOVED]**, **[MOVED]**, **[CHANGED]**, or **[UNCHANGED]** appended to the end of each chapter title in the published document.



NOTE A Word document containing tables is created when you publish the document differences report. If you view this Word document in Print Layout, some of the tables are not visible. However, if you view this Word document in Normal layout, the entire document is visible.

Viewing a Snapshot or Document

You can view the individual snapshot or document from the "compare" version of the Document work page.

To view a snapshot or document from the "compare" version of Documents View:

- Click a document or snapshot link next to **Go to:** at the top of the Detail pane.
 - The normal Document work page of the document or snapshot is displayed. Because snapshots are read-only, their chapters, subchapters, and requirements are dimmed in the Navigation pane.

Publishing Documents

Publish as a Microsoft Word Document

You can publish an RM document or snapshot as a Microsoft Word file from the **Document View**.

- The RM document name becomes the name of the Word file.
- The RM document name becomes the title of the Word document, unless you cleared the **Publish Title** check box in either the *New Document* or *Edit Document* dialog.
- The Navigation pane becomes the table of contents for the Word document.
- The content and layout in the Detail pane define the body of the Word document.

You can download or open the Word document after it is published.



NOTE

- The published Word document is not stored in the Dimensions RM database.
- If Microsoft Word is not installed on the server, Microsoft Word documents are created with file extension .doc instead of .docx. When opening a .doc file, you might receive a message that informs you that this file is in a different format than .doc. You can safely click **Yes** in this dialog box and the file will open in Word.
- If a .doc file is created, all links in the Table of Contents point to page number one. To correctly number the entries in the Table of Contents, right-click the Table of Contents and select **Update** in the context menu.
- If you want to give a Word Document to someone for external editing and later import the changes, you might want to use a Roundtrip document instead of a regular Word document. For further information on Roundtrip documents, see chapter "[Publish as a Roundtrip Document](#)" on page 218.

To publish to a Microsoft Word file:

- 1 Open the document or snapshot to the Document work page, if it is not already open. See "[Opening Documents or Snapshots](#)" on page 175.
- 2 Click **Publish** in the **Documents** set of the **Actions** pane.
- 3 The Publish Document dialog prompts in which format you want to publish the document. Select **Word Document (*.docx)** and click **Publish**.
- 4 When prompted by your browser, click **Save** to save the file to your local system.



NOTE An administrator can configure the system to print headers and footers in the published document and use custom styles for the published document. An administrator can also create custom templates that you can select for the published document.

To select an existing custom template, see "[Restricting Requirement Classes in a Document](#)" on page 191. To create a custom template, see chapter "[Creating Templates to Publish Requirements](#)" in *Dimensions RM Administrator's Guide*.

Viewing Attachments in the Published Document

If requirements in the document contain file attachment attributes, they can be included as links in the published Word document. To see the links, you must add the File Attachment attribute to the **Attributes to Display** list in the **Document Settings** dialog box. For information about this dialog box, see "[Display Options](#)" on page 190.

The links are displayed as icons. Double-click the icon in the published document to open the associated file.



NOTE

- Because the published document and the file attachments are stored in one document, the size of the document can be quite large. Its size depends on the number of requirements that have file attachments and the size of the file attachments.
- You can install Microsoft Word on your Dimensions RM Web server to publish attachments within your document, or you can choose to install it on other server. An administrator can configure the server if you do not want Word installed on the Web server. For more information, please see the *Dimensions RM Administrator's Guide*.

The following illustration shows the file attachment links in the published document in grid layout.

3.1.3 Functional Requirements

#	Rqmt ID	Title	Text	File Attachment
3.1.3.1	MRKT_000001	EPhoto will be an online photo album	The ePhoto system shall enable the user to browse an on-line photo album. It shall look and feel like an electronic photo album, just like the one on the coffee table.	no file attached
3.1.3.1.1	MRKT_000024	Stored photo slideshows	The ePhoto system shall provide the capability to create a slide shows of stored photos.	 prototype.png
3.1.3.1.2	MRKT_000023	EPhoto will be an online photo album	The ePhoto system shall enable the user to browse an on-line photo album. It shall look and feel like an electronic photo album, just like the one on the coffee table.	 prototype.png

The following illustration shows the file attachment links in the published document in paragraph layout:

3.1.3 Functional Requirements

3.1.3.1 EPhoto will be an online photo album

Rqmt ID: MRKT_000001 **File Attachment:** no file attached

This ePhoto system shall enable the user to browse an on-line photo album in a manner similar to browsing the one on the coffee table.

3.1.3.1.1 Stored photo slideshows

Rqmt ID: MRKT_000024

File Attachment:



The ePhoto system shall provide the capability to create a slide shows of stored photos.

3.1.3.1.2 Displaying stored photo infos

Rqmt ID: MRKT_000023

File Attachment:



The ePhoto system shall allow users to display any of the information stored with the photo.

Publish as a Roundtrip Document

If you want to give a Word Document to someone for external editing and later import the changes, you might want to use a Roundtrip document instead of a regular Word document. The difference between a Roundtrip document and a regular Word document is that the Roundtrip document uses a defined format on the published requirements, and specifies IDs to chapters and the document header. These IDs - as well as the IDs in the requirements - allow recognition of changes during import.

To publish to a Roundtrip document:

- 1 Open the document or snapshot to the Document work page, if it is not already open. See "[Opening Documents or Snapshots](#)" on page 175.
- 2 Click **Publish** in the **Documents** set of the **Actions** pane.
- 3 The Publish Document dialog prompts in which format you want to publish the document. Select **Roundtrip Word Document (*.docx)** and click **Publish**.
- 4 When prompted by your browser, click **Save** to save the file to your local system.

Publish as an Adobe PDF Document

You can publish an RM document or snapshot as an Adobe PDF file from the **Document View**.

- The RM document name becomes the name of the PDF file.
- The RM document name becomes the title of the PDF document, unless you cleared the **Publish Title** check box in either the *New Document* or *Edit Document* dialog.
- The Navigation pane becomes the table of contents for the PDF document.
- The content and layout in the Detail pane define the body of the PDF document.

You can download or open the PDF document after it is published.



NOTE

- The published PDF document is not stored in the Dimensions RM database.
- Attachments cannot be embedded into a PDF document.
- On the server, Microsoft Word is required to generate PDF files. If Microsoft Word is not installed on the server, Microsoft Word documents are created with file extension .doc instead of a PDF file. When opening a .doc file, you might receive a message that informs you that this file is in a different format than .doc. You can safely click **Yes** in this dialog box and the file will open in Word.

To publish to an Adobe PDF file:

- 1 Open the document or snapshot to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Click **Publish** in the **Documents** set of the **Actions** pane.
- 3 The Publish Document dialog prompts in which format you want to publish the document. Select **PDF Document (*.pdf)** and click **Publish**.
- 4 When prompted by your browser, click **Save** to save the file to your local system.



NOTE An administrator can configure the system to print headers and footers in the published document and use custom styles for the published document. An administrator can also create custom templates that you can select for the published document.

To select an existing custom template, see ["Restricting Requirement Classes in a Document" on page 191](#). To create a custom template, see *"Creating Templates to Publish Requirements"* in *Dimensions RM Administrator's Guide*.

Publish as a Microsoft Excel Spreadsheet

You can publish an RM document or snapshot as a Microsoft Excel file from the **Document View**.

- The RM document name becomes the name of the Excel file.
- The content and layout in the Detail pane define the cell contents of the Excel spreadsheet.

- You can download or open the Excel file after it is published.



NOTE The published Excel file is not stored in the Dimensions RM database.

To publish to a Microsoft Excel file:

- 1 Open the document or snapshot to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Click **Publish** in the **Documents** set of the **Actions** pane.
- 3 The Publish Document dialog prompts in which format you want to publish the document. Select **Excel Spreadsheet (*.xlsx)**.
- 4 Select any of these options if desired:
 - a **Include images:** If selected, images are exported into the Excel file.
 - b **Publish all displayed attributes:** If selected all attributes selected in the Attributes to Display list (see chapter ["Display Options" on page 190](#)) are exported into the Excel spreadsheet. If this option is clear, only Title and Description attributes are exported into the Excel spreadsheet.
- 5 Click **Publish**.
- 6 When prompted by your browser, click **Save** to save the file to your local system

Publish as a ReqIFZ Document

You can publish an RM document or snapshot as a ReqIFZ document file from the **Document View**.

- The RM document name becomes the name of the ReqIFZ file.
- Title and Description are stored as ReqIF.Name and ReqIF.Description values.

You can download the ReqIFZ file after it is published.



NOTE

- The published ReqIFZ file is not stored in the Dimensions RM database.
- Attachments cannot be embedded into a ReqIFZ document.

To publish to an ReqIFZ file:

- 1 Open the document or snapshot to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Click **Publish** in the **Documents** set of the **Actions** pane.
- 3 The **Publish Document** dialog prompts in which format you want to publish the document. Select **ReqIF Document (*.reqifz)** and click **Publish**.
- 4 When prompted by your browser, click **Save** to save the file to your local system.

Copying the Publish URL of a Document to the Clipboard

If you need a document to be published in a specific format frequently, you can simplify that task by storing a Publish URL of that document in your web browser. Clicking the publish URL will then publish that document (e.g. in PDF format) and allow you to open or save it (depends on your web browser settings).

To copy the Publish URL of a document:

- 1 Open the document or snapshot to the Document work page, if it is not already open. See ["Opening Documents or Snapshots" on page 175](#).
- 2 Click **Publish** in the **Documents** group of the **Actions** pane.
- 3 The **Publish Document** dialog prompts in which format you want to publish the document. Select the desired format.
- 4 Click **Create direct URL**. This opens a dialog with the URL.
- 5 Select the URL and press **Ctrl + C**, or right-click on the highlighted URL and select **Copy** from the shortcut menu to copy the URL to the Clipboard.
- 6 Click **Cancel** to close the dialog.
- 7 Press **Ctrl + V**, or the relevant application-specific menu command, to paste the URL into the file or application where you wish to use it.



TIP You can add user name and password to the URL which allows you to publish the document without having to log in.

Add the following to the URL: `&u=user_name&pwd=password`

Using Workflows with Documents

If configured by your administrator, you can use Workflows with documents.

Assigning a Document to a Workflow

To assign a document to a workflow, do the following:

- 1 Open the document (see chapter ["Opening Documents or Snapshots" on page 175](#)).
- 2 Select **Document Settings** from the **Documents** set of the **Actions** pane. This opens the **Document Settings** dialog.
- 3 Ensure that the **General** tab is selected.
- 4 From the **Workflow** box, select the desired workflow.



CAUTION! Once you confirm the dialog, the Workflow setting for the document cannot be changed. Thus, verify that you selected the correct workflow.

- 5 Click **OK**.

Executing a Transition on a Document

In order to use a workflow with a document, a Workflow must be assigned to that document (see chapter ["Assigning a Document to a Workflow" on page 221](#)).

To execute a transition, do the following:

- 1 Open the document (see chapter ["Opening Documents or Snapshots" on page 175](#)).
- 2 Click the button for the desired transition, which is located underneath the **Welcome** menu in the top right corner of the screen. Executing the transition may open a form for input which must be filled out to complete the transition.

Next to the transition button(s), you find a progress bar, which shows the current state. If configured by your administrator, the value of the progress bar may change according to the workflow state.

Viewing Information about a Document

If a document is assigned to a workflow, you can use the same functions as for requirements, e.g. view/modify attributes or see the state change history, or execute a transition.

To open the document information, do the following:

- 1 Open the document (see chapter ["Opening Documents or Snapshots" on page 175](#)).
- 2 Click the progress bar showing the current state. This opens the **Edit Attributes** dialog for the document.

For further information about the **Edit Attributes** dialog, see ["Editing a Requirement" on page 114](#) (start with point 2 of the list) and ["Workflows" on page 105](#).

Using Placeholders in Documents

Within chapters or requirements you can define placeholders which are filled during the publish process. These placeholders provide information of the document or snapshot and the workflow of the document or snapshot (if you assigned a workflow).

Document Placeholders

The following document placeholders are available:

Placeholder	Description
Document Category	The name of the category the document resides in, e.g. <i>Maintenance</i> .
Document Category Path	The full path of the category the document resides in, e.g. <i>RMDEMO\Support\Maintenance</i> .
Document Chapter Count	The number of chapters in the document.

Placeholder	Description
Document Created At	The date or date and time the document was created. For information on how to format date placeholders, see chapter "Specifying a Format for Date Placeholders" on page 224 .
Document Created By	The name of the user who created the document. The format depends on the display setting for user attributes (see chapter "Display Settings for User Attributes" on page 77).
Document Modified At	The date or date and time of the most recent modification of the document. For information on how to format date placeholders, see chapter "Specifying a Format for Date Placeholders" on page 224 .
Document Modified By	The name of the user who made the most recent modification of the document. The format depends on the display setting for user attributes (see chapter "Display Settings for User Attributes" on page 77).
Document Owner	The name of the user who owns the document. The format depends on the display setting for user attributes (see chapter "Display Settings for User Attributes" on page 77).
Document Requirement Clount	The number of requirements in the document.
Document Revision Number	The revision number of a snapshot (e.g. 1.2). For documents, the revision number is always 0.0.
Document Revision Number (Major)	The major part of the revision number of a snapshot. If the revision number is 2.1, the major part would be 2. For documents, it is always 0.
Document Revision Number (Minor)	The minor part of the revision number of a snapshot. If the revision number is 2.1, the minor part would be 1. For documents, it is always 0.
Document Title	The name of the document
Document Workflow	The name of the workflow assigned to the document. If no workflow is assigned, this placeholder is empty.
Document Workflow State	The state of the document in the workflow. If no workflow is assigned, this placeholder is empty.
Document Workflow State Reached At	The date or date and time the document reached the state in the workflow. If no workflow is assigned, this placeholder is empty.

Adding a Placeholder to a Chapter or Requirement

To add a placeholder to a chapter or requirement, do the following:

- 1 Open the Document View (see chapter ["Opening Documents or Snapshots" on page 175](#)).
- 2 Ensure that the document is shown in the Entire Document View (see chapter ["Editing a Chapter in Entire Document View Mode" on page 199](#)).

- 3 Click into the chapter description or a text attribute of a requirement that allows Rich Text editing.
- 4 Select the desired placeholder from the **Fields** drop-down list.
- 5 Click **Save**.

Specifying a Format for Date Placeholders

Date placeholders can be formatted to display certain dates. Due to a limitation of Microsoft Word, the format has to be specified with the placeholder in the HTML of the chapter description or text attribute.

The following table shows the supported format specifiers. All examples assume the following date/time: September 1, 2008 14:03:04

Format	Description
d	Single-digit day (if possible). Example: 1
dd	Two-digit day: Example: 01
ddd	Abbreviated name of the day. The name depends on language setting on the server. Example: Mon
dddd	Name of the day. The name depends on language setting on the server. Example: Monday
M	Single digit month (if possible). Example: 9
MM	Two-digit month: Example: 09
MMM	Abbreviated name of the month. The name depends on language setting on the server. Example: Sep
MMMM	Name of the month. The name depends on language setting on the server. Example: September
y	Single-digit year (if possible). Example: 8
yy	Two-digit year Example: 08
yyy	Three-digit year: Example: 008
yyyy	Four-digit year. Example: 2008
h	Single-digit hour (if possible) in 12 hour format. Example: 2

Format	Description
hh	Two-digit hour in 12 hour format. Example: 02
H	Single-digit hour (if possible) in 24 hour format: Example: 14
HH	Two-digit hour in 24 hour format: Example: 14
m	Single-digit minute (if possible). Example: 3
mm	Two-digit minute. Example: 03
s	Single-digit second (if possible). Example: 4
ss	Two-digit second. Example: 04
a	AM/PM specifier. Actual values depend on system setting. Default: AM and PM
p	AM/PM specifier. Actual values depend on system setting. Default: AM and PM

To specify or change the format for a date placeholder, do the following:

- 1 Click into the description or text attribute that holds your placeholder.
- 2 In the Rich Text editor, select **Source code** from the **Tools** menu.
- 3 Locate the date placeholder for which you want to specify the format.
Example:

```
<a target="_blank" class="rmPlaceholder"
data-rmplaceholderformat=""
data-rmplaceholderfriendlyname="Document Created At" data-
rmplaceholdername="rmDocumentCreatedAt">###Document Created At###</
a>
```
- 4 Modify the data-rmplaceholderformat attribute to your desired format.
Example:

```
<a target="_blank" class="rmPlaceholder"
data-rmplaceholderformat="MMMM/dd/yyyy hh:mm:ss"
data-rmplaceholderfriendlyname="Document Created At" data-
rmplaceholdername="rmDocumentCreatedAt">###Document Created At###</
a>
```
- 5 Click **OK**.
- 6 When using the Entire Document View or creating a new requirement, click **Save**.
With the **New Chapter** or **Edit Chapter** dialog, click **OK**.
With the **Edit Attributes** dialog, click **Replace** or **Update**.

Chapter 5

Working with the Home View

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About the Home View



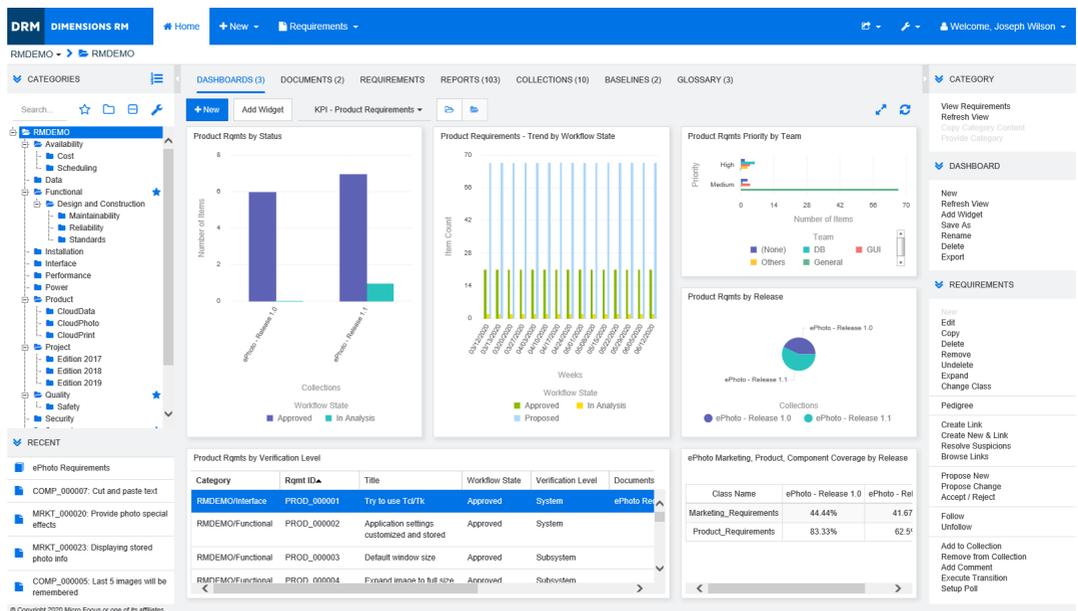
From the Home View users may run dashboards, or access documents, requirements, reports, collections, baselines or glossary entries. It includes the following elements:

- **Search:** This field limits the display in the active tab to those items that match the search string. The search is dynamic, and increasingly narrows the displayed results as you enter more characters. To return to displaying all items, delete the string from the Search field or click the **X** button in the Search field.
- **Tabs:** A number in the title of each tab indicates how many of each item type exist in the selected category. Double-click an item to open it in the relevant work page, or select the item and then click an action in the Actions pane. See the following subsections for a description of each tab.

To open the Home View, click  in the menu bar. For more information about the menu bar, see chapter "Menu Bar" on page 22.

Dashboard Tab

The dashboard allows you to add graphical and text reports. You can add an unlimited number of dashboards and each dashboard can have an unlimited number of reports. However, for a better overview, a maximum of 9 reports is recommended. To access your dashboard, select the **Home View** and click on the **Dashboards** tab.



Using Dashboards

To switch to another dashboard, select it from the list next to the **Add Widget** button. The  icon identifies private dashboards.

Dashboard reports use the requirements of the category selected in the **Categories** tree on the left hand side of the screen. This also means that if a dashboard was created for a category it is only available within this category or in the subcategories of that category if this was defined on creation of the dashboard.

Class reports and relationship reports allow multi-selection of requirements. For further information about multi-selection, see chapter ["Selecting Multiple Requirements" on page 33](#).

Limiting Report Data

To limit report results based on the category in the **Categories** tree, select one of these category filter options:

- : The dashboard shows data from all categories.
- : The dashboard only shows data matching the category in the **Categories** tree.
- : The dashboard shows data from the selected category in the **Categories** tree and its subcategories



NOTE If a report has constraints on one or more categories, it will override the category selected in the **Categories** tree. As a result, the report will show all requirements that match its category constraint.

About the My Work Dashboard

The My Work dashboard is a dashboard with pre-defined reports. As the dashboard does not exist when a new Dimensions RM instance is created, you or your administrator can create it.

The following reports are available for the **My Work** dashboard:

- **Proposals** — If the **Filter By Me** option is clear (this is the default setting), this section shows proposals that were created or updated by **any user**, and shows pending proposals that were submitted as requests for new requirements by **any user**.
If the **Filter By Me** option is selected, this section shows proposals that were created or modified by the **logged-in user** or where the associated requirement was created or modified by the **logged-in user**.
- **Recent Comments** — Shows comments that were added to requirements that were created or updated by any user within the specified time frame.
- **Recently Changed Requirements** — Shows requirements that have been modified or created by any user within the specified time frame.
- **Recent Polls** — Shows polls that meet the specified conditions within the specified time frame.

To create the My Work dashboard, execute these steps:

- 1 Open the Home View by clicking .
- 2 Create a dashboard and name it *My Work* (see chapter ["Creating a Dashboard" on page 231](#)).
- 3 Click the **Configure** link in a section to which you want to add a report. This opens the **Edit Widget** dialog.
- 4 From the **Report Type** box, select **My Work**.
- 5 Select the report you want to add and click **Next**.
- 6 If desired, change the title.
- 7 Provide parameters for the report as required or desired.
- 8 Click **Save**.

Using Dashboard Widgets

When moving the cursor over the title bar of a report, these functions become available:

-  **Settings:** Opens the *Edit Widget* dialog. This dialog offers the same functionality as the *Add Widget* dialog. For further information refer to chapter ["Adding a Standard Report to the Dashboard" on page 232](#), ["Adding a Graphical Report to the Dashboard" on page 233](#), or ["Adding a Website to the Dashboard" on page 234](#).
-  **Fullscreen:** Magnifies the report that it fills the whole screen.
-  **Refresh:** Refreshes the data of the report. To refresh the data of all reports, click on **Refresh View** from those listed below **Dashboard** in the **Actions** pane.
-  **Delete:** Removes the report from the dashboard.

Moving Widgets

You can move reports freely within the selected dashboard by following these steps:

- 1 Move the mouse pointer to the report you want to move.
- 2 Click on the title bar and keep holding the mouse button.
- 3 Move the report to the new position. The new position is marked by dashed lines. If a report is already at the new position, it is moved away.
- 4 Release the mouse button.

Resizing Widgets

Apart from resizing a report to full screen by clicking the Fullscreen icon  in the report's title bar, you can also resize it to fill one or several tiles by following these steps:

- 1 Move the mouse pointer to the bottom right corner of the report you want to resize. The mouse pointer changes to a double-arrow pointer.
- 2 Click on the corner and keep holding the mouse button.
- 3 Move the mouse pointer to the position to which you want to extend the report. If a report is already at the new position, it is moved away.
- 4 Release the mouse button.

Creating a Dashboard

To create a dashboard:

- 1 Go to the **Home View** and click on the **Dashboards** tab.
- 2 Click the **+ New** button under the Dashboards tab or click **New** from below **Dashboard** in the **Action** pane. This opens the *New Dashboard* dialog.



NOTE The dashboard will be available in the category selected in the Category tree and optionally also in the subcategories.

- 3 Enter the **Title** of the dashboard.
- 4 If your user account has the **Create Public** right, you can select the **Public Dashboard** option. If this option is selected, also other users can access the dashboard. If this option is clear, only the user who created the dashboard can access it.
When selecting the **Public Dashboard** option, the **Visible for** and **Editable for** lists are shown. Select the groups you want to be able to see or edit the dashboard.
 - a To give permission (to see or edit the dashboard) to all groups, select **All**.
 - b To give permission (to see or edit the dashboard) to some groups, select the groups to give the permission to. These groups are marked with a check mark.
- 5 If **Show in Subcategories** is checked it means that you can access the dashboard also in subcategories of the category it was created in.
- 6 Select one of these layouts:



Freestyle: Allows to add reports anywhere on the dashboard.



Tile 9: Creates a matrix of 3x3 tiles.



Horizontal 3: Creates 3 rows of identical size.



Horizontal 2/3: Creates 2 rows with the first to use about 2/3 of the dashboard.



Horizontal 1/3: Creates 2 rows with the first to use about 1/3 of the dashboard.



Vertical 3: Creates 3 columns of identical size.



Vertical 2/3: Creates 2 columns with the first to use about 2/3 of the dashboard.



Vertical 1/3: Creates 2 columns with the first to use about 1/3 of the dashboard.

- 7 Click on **Save**.

Adding a Standard Report to the Dashboard

Standard reports show their data in a table. To create your own reports, see chapter "[Working with Reports](#)" on page 245.

To add a standard report to the dashboard:

- 1 Go to the **Home View** and click on the **Dashboards** tab.
- 2 Select a dashboard from the Dashboard list or create a dashboard as described in chapter "[Creating a Dashboard](#)" on page 231.
- 3 Click on the **Add Widget** button under the Dashboards tab or click **Add Widget** from the **Dashboard** set of the **Action** pane. This opens the *Add Widget* dialog.
- 4 Ensure that the **Widget Type** box shows **Show a report**.
- 5 In the **Category** box, select the category in which the report is located.
- 6 Select a report.



TIP You can get a better overview by selecting an entry from the **Report Type** list and/or entering part of the report name into the **Title Filter** text box.

- 7 If you like, change the title of the report by changing the text in the **Widget Title** text box.
- 8 If the selected report uses runtime parameters, see chapter "[Using Reports with Runtime Parameters](#)" on page 233.
- 9 Click **Save**.

Adding a Graphical Report to the Dashboard

Graphical reports show their data in with diagrams. To create your own graphical reports, see chapter ["Creating a Graphical Report" on page 250](#).

To add a graphical report to the dashboard:

- 1 Go to the **Home View** and click on the **Dashboards** tab.
- 2 Select a dashboard from the Dashboard list or create a dashboard as described in chapter ["Creating a Dashboard" on page 231](#).
- 3 Click on the **Add Widget** button under the Dashboards tab or click **Add Widget** from the **Dashboard** set of the **Action** pane. This opens the *Add Widget* dialog.
- 4 Ensure that the **Widget Type** box shows **Show a report**.
- 5 Select **Graphical** from the **Report Type** list.
- 6 In the **Category** box, select the category in which the report is located.
- 7 Select a report.



TIP You can get a better overview by entering part of the report name into the **Title Filter** text box.

- 8 If you like, change the title of the report by changing the text in the **Widget Title** text box.
- 9 If the selected report uses runtime parameters, see chapter ["Using Reports with Runtime Parameters" on page 233](#).
- 10 Select the **Report Style** tab to select the style for the report.
- 11 Click **Save**.

Using Reports with Runtime Parameters

Some reports may require that you enter or select data when running the report. These runtime parameters must be defined when adding the report to the dashboard. If a report has runtime parameters, a tab named **Parameters** appears next to the **Report** tab.

To enter or select Runtime Parameters:

- 1 Select the **Parameters** tab.
- 2 Enter a value or select from the list of each parameter.



TIPS

■ Using Lists Parameters:

To select or deselect all entries in a list, click **Select all** or **Deselect all**.

■ Using Category Parameters:

To open or close all categories, click **Open all** or **Close all**.

To select or clear all categories, click **Check all** or **Uncheck all**.

Adding a Website to the Dashboard

Instead of reports, you can also add websites to the dashboard. The websites must use the http or https protocol. Other protocols, e.g. ftp or gopher are not supported.

To add a website to the dashboard:

- 1 Go to the **Home View** and click on the **Dashboards** tab.
- 2 Select a dashboard from the Dashboard list or create a dashboard as described in chapter "Creating a Dashboard" on page 231.
- 3 Click on the **Add Widget** button under the Dashboards tab or click **Add Widget** from the **Dashboard** set of the **Action** pane. This opens the *Add Widget* dialog.
- 4 Select **Show a website** from the **Widget Type** box.
- 5 Enter the URL to the website.



IMPORTANT! You must enter the protocol (http:// or https://) as a prefix to the URL, for example `http://www.serena.com`.

If you do not enter the protocol, the dashboard will show an error message instead of the website.

- 6 Enter a title for the website into the **Widget Title** text box.
- 7 Click **Save**.

Copying a Dashboard

When copying a dashboard you can set these properties:

- **Title:** The title of the dashboard.
- **Visibility:** If you are an administrator, you can choose between **Public** and **Private**:
 - **Public** means that other users can access the dashboard.
 - **Private** means that only the user who created the dashboard can access it.
- **Show in Subcategories:** If this checkbox is checked it means that you can access the dashboard also in subcategories of the category it was created in. To copy a dashboard:

- 1 Go to the **Home View** and click on the **Dashboards** tab.
- 2 Select a dashboard from the Dashboard list.
- 3 Click **Save As** from the **Dashboard** set in the **Action** pane.
- 4 Enter a new **Title**.
- 5 Select **Visibility** and **Show in Subcategories** if required.
- 6 Click **Save**.

Renaming a Dashboard

To rename a dashboard:

- 1 Go to the **Home View** and click on the **Dashboards** tab.
- 2 Select a dashboard you want to rename from the Dashboard list.
- 3 Click **Rename** from the **Dashboard** set in the **Action** pane.
- 4 Enter a new name in the *Rename Dashboard* dialog.
- 5 Click **Save**.

Deleting a Dashboard

Please note that deleting a dashboard is irreversible.

To delete a dashboard:

- 1 Go to the **Home View** and click on the **Dashboards** tab.
- 2 Select a dashboard you want to delete from the Dashboard list.
- 3 Click **Delete** from the **Dashboard** set on the **Action** pane.
- 4 Confirm the *Delete Dashboard* dialog.

Exporting a Dashboard

Dashboard export allows you to export all graphical widgets into a PowerPoint presentation or an PDF document. All other widget types are ignored. Note that the export function does not allow to specify any export settings. The export settings are configured on the server as described in the *Administrator's Guide*.

To export a dashboard, do the following:

- 1 Go to the **Home View** and select the **Dashboards** tab.
- 2 Select a dashboard you want to export from the Dashboard list.
- 3 Click **Export** from the **Dashboard** set on the **Action** pane. This opens the **Export Dashboard** dialog.
- 4 Select the desired format from the **Export Dashboard to** list.
- 5 Click **Export**.

Documents Tab

DASHBOARDS (3) DOCUMENTS (5) REQUIREMENTS REPORTS (108) COLLECTIONS (10) BASELINES (2) GLOSSARY (3)				
+ New Search... ☆ Columns				
Name ▲	Time Created	Time Modified	Modified By	
  ePhoto Requirements 1	18-MAY-2006@00:00:00	08-OCT-2019@07:30:35	Joseph Wilson	
 ePhoto Requirements 0.1	10-JUL-2018@03:19:08	10-JUL-2018@03:19:08	Ryan Forbes	
  Photos In the Cloud (Master) 2	23-MAR-2016@12:08:50	08-OCT-2019@07:32:22	Joseph Wilson	
 Cloud Family Photos (Child)	23-MAR-2016@12:20:05	08-OCT-2019@07:32:21	Joseph Wilson	
 Photo Travel (Child)	23-MAR-2016@12:25:10	08-OCT-2019@07:32:22	Joseph Wilson	

This is an alphabetical listing of the RM documents in the currently selected category or categories, as filtered by the **Search** field. Documents can be identified by the  icon.

Favorites: When selecting the **Favorites** option, only favorite documents are shown.

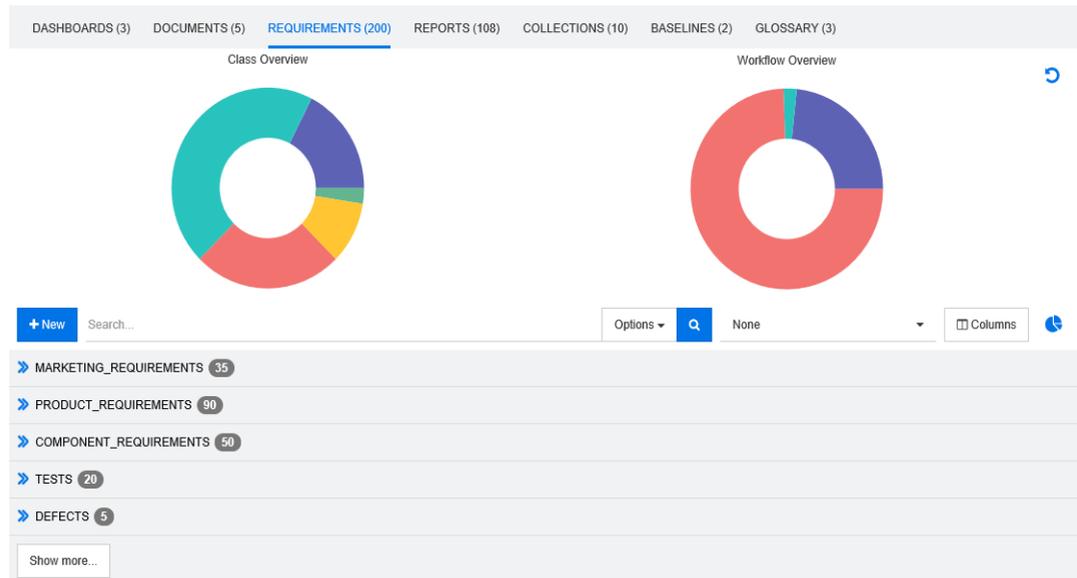
Properties: Opens the **Properties** dialog, which allows selection of document related attributes (also custom attributes) for display in the Home View.

 : If a document has snapshot or child documents, you can access these directly by clicking  .

-  identifies a snapshot
-  identifies a child document

Double-click an item to open it in the Document work page, or select the item and then click an action in the Actions pane. See [Chapter 4, "Working with Documents" on page 167](#).

Requirements Tab



The **Requirements** tab gives you quick access to all requirements of the selected categories. You can filter those requirements by using the **Search** box.

The Requirements tab is similar to Quick Search with these differences:

- Expanding a section hides all other sections. Collapsing the section shows the hidden sections again.
- To include subcategories, select them in the category tree. The option **Include Subcategories** is not available.
- The columns displayed are identical with those used in Quick Search. For details, see chapter "[Quick Search Settings](#)" on page 81.

If you want to search by specific attributes, use Quick Search (see chapter "[Finding Requirements with Quick Search](#)" on page 92).

Reports Tab

Reports by Type Mode

The screenshot shows the 'REPORTS (108)' tab selected in the top navigation bar. Below the navigation bar, there are three columns of report listings: 'Class Reports', 'Relationship Reports', and 'Traceability Reports'. Each column has a 'Name' header and a 'Class' header. The 'Class Reports' column lists reports like 'Build 1 Marketing...', 'Component Rqmt...', and 'Current Marketing...'. The 'Relationship Reports' column lists 'All Current Component Requirements', 'All Current Data Comp Requirements', and 'All Current Defects'. The 'Traceability Reports' column lists 'Component Requirement Defects', 'Component Requirement Tests', and 'Component Requirements Design'.

This is an alphabetical listing of the reports in the currently selected category or categories. It contains separate columns for each type of report: **Class**, **Relationship**, and **Traceability**. The **Class Reports** list includes the **Class** column that shows for which class the report queries data. All columns can be sorted by clicking the column title. To change to **Reports by Type** mode, click .

All Reports Mode

The screenshot shows the 'REPORTS (103)' tab selected. The report listings are now in a single table with columns: 'Name', 'Type', 'Class', 'Description', and 'Created By'. The 'Type' column distinguishes between 'Relationship' and 'Class' reports. The 'Class' column shows the class name for class reports. The 'Created By' column shows the user who created the report.

Name	Type	Class	Description	Created By
All Current Component Require...	Relationship		This script reports all the curren...	Ryan Forbes
All Current Data Comp Require...	Relationship		All current component requirem...	Ryan Forbes
All Current Discussions	Relationship		This script reports all current Di...	Ryan Forbes
All Current Marketing Rqmts	Relationship		This script reports all the curren...	Ryan Forbes
All Current Product Rqmts	Relationship			Ryan Forbes
All Suspect Marketing	Relationship			Ryan Forbes
Build 1 Marketing Rqmts	Class	Marketing_Requirements	This filter retrieves all current M...	Carter Benton

This is an alphabetical listing of the reports in the currently selected category or categories. The different report types (Class, Relationship, and Traceability) can be distinguished by the **Type** column. The **Class** column contains the class for class reports. To change to **All Reports** mode, click .

The All Reports mode allows to select the columns to be shown.

To change the displayed columns, do the following:

- 1 Click . This opens the **Report Properties** dialog.
- 2 Add the columns you wish to show and remove the columns you wish to hide.
- 3 Click **OK**.

Opening a Report

Double-click an item to open it in the relevant report work page, or select the item and then click an action in the Actions pane. See [Chapter 6, "Working with Reports" on page 245](#).

Favorite Reports

For ease of access, reports can be marked as a favorite report. This allows quick access to reports which are used frequently. Each user can define their own favorites.

To mark a report as a favorite report, do the following:

- 1 Open the Home View.
- 2 Select the category in which the report is located.
- 3 Select the Reports tab.
- 4 Move the mouse pointer over the report name. Click the star that appears next to the report name.

To remove a report from the favorites, do the following:

- 1 Open the Home View.
- 2 Select the category in which the report is located.
- 3 Select the Reports tab.
- 4 Click the star next to the report name.

Filtering Reports

Reports can be filtered by using one or several of the following filters:

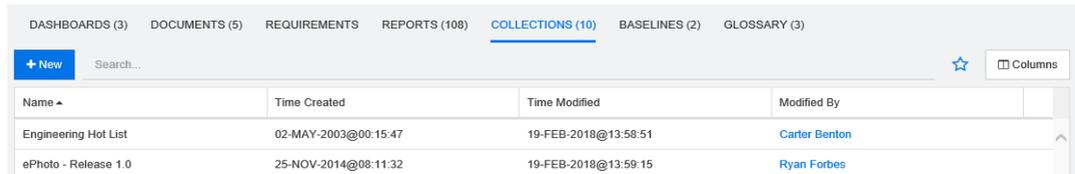
- **Search:** Type a text into the **Search** box. Only reports with the entered text in their name are shown. Search can be combined with all other options.
- **Favorites:** If selected, favorite reports are displayed. **Favorites** can be used in combination with **Public Reports** or **My Reports**.
- **Public Reports:** If selected, public reports are displayed.
- **My Reports:** If selected, reports created by the logged in user are displayed.

The following icons are used with reports:

-  Class Report
-  Class Distribution Report
-  Class Trend Report
-  Relationship Report

-  Relationship Matrix Report
-  Traceability Report
-  Traceability Coverage Report
-  Report created by the current user

Collections Tab



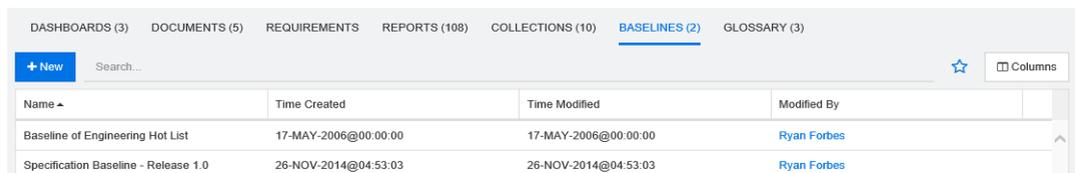
Name	Time Created	Time Modified	Modified By
Engineering Hot List	02-MAY-2003@00:15:47	19-FEB-2018@13:58:51	Carter Benton
ePhoto - Release 1.0	25-NOV-2014@08:11:32	19-FEB-2018@13:59:15	Ryan Forbes

This is an alphabetical listing of the collections in the currently selected category or categories, as filtered by the Search field.

Double-click an item to open it in the Collections work page, or select the item and then click an action in the Actions pane.

After opening a collection, you select multiple requirements. For further information about multi-selection, see chapter ["Selecting Multiple Requirements" on page 33](#).

Baselines Tab



Name	Time Created	Time Modified	Modified By
Baseline of Engineering Hot List	17-MAY-2006@00:00:00	17-MAY-2006@00:00:00	Ryan Forbes
Specification Baseline - Release 1.0	26-NOV-2014@04:53:03	26-NOV-2014@04:53:03	Ryan Forbes

This is an alphabetical listing of the baselines in the currently selected category or categories, as filtered by the Search field.

Double-click an item to open it in the Baselines work page, or select the item and then click an action in the Actions pane.

After opening a baseline, you select multiple requirements. For further information about multi-selection, see chapter ["Selecting Multiple Requirements" on page 33](#).

Glossary Tab

The **Glossary** tab is only available if your administrator created the Glossary class as described in the *Administrator's Guide*.

The screenshot shows the 'Glossary (3)' tab selected in the top navigation bar. On the left, a list of entries is shown with 'CD-ROM' highlighted. The right pane displays the details for 'CD-ROM', including a description: 'A CD-ROM is a pre-pressed optical compact disc which contains data. The name is an acronym which stands for "Compact Disc Read-Only Memory". Computers can read CD-ROMs, but cannot write to CD-ROMs which are not writable or erasable.' Below the description is a 'Synonyms' field containing 'None'. There are 'Delete' and 'Edit' buttons in the top right corner of the detail pane.

Adding a new Glossary Entry

To add a new glossary entry, do the following:

- 1 Click **New** on the top left corner of the Glossary tab or click **New** from the actions listed under **glossary** in the **Actions** pane. This changes the detail section of the **Glossary** tab to an empty input form.
- 2 In the **Term** box, specify the word or phrase for which you want to define the description in the glossary.
- 3 Enter a descriptive text for the glossary entry into the **Description** box.
- 4 If you like, enter alternative words for the term into the **Synonyms** box. Separate entries with a comma.



NOTE When using synonyms which contain part of another synonym, use the shortest synonym last, e.g. use "CD-R, CD" instead of "CD, CD-R". This ensures that both, CD-R and CD are recognized when scanning a text.

- 5 If the **Show in subcategories** box is selected, the glossary entry will be available in the specified category and child categories. If this box is clear, the glossary entry will only be available in the selected category.
- 6 Click **Create** at the bottom of the edit form or click **Save** from items listed below **Glossary** on the **Actions** pane.

Editing a Glossary Entry

To edit an existing glossary entry, do the following:

- 1 Select the glossary entry in the list.
- 2 Double-click into the detail section of the glossary entry or click **Edit** in the **Glossary** set of the **Actions** pane. This changes the detail section of the **Glossary** tab to the edit form.
- 3 Make your desired changes to **Term**, **Description** or **Synonym**.

- 4 If the **Show in subcategories** box is selected, the glossary entry will be available in the specified category and child categories.
If this box is NOT checked, the glossary entry will only be available in the currently selected category.
- 5 Click **Replace** at the bottom of the edit form or click **Save** in the **Glossary** set of the **Actions** pane.

Copying Glossary Entries

If parts of a glossary entry are identical, you may choose to copy one or several entries and then edit them rather than manually copying parts over to the new entry.

To copy glossary entries, do the following:

- 1 Select one or several glossary entries in the list.
- 2 Click **Copy** in the **Glossary** set of the **Actions** pane. This opens the **Copy Glossary Term(s)** dialog.
- 3 Select the category you want to copy the glossary entries to.
- 4 If you want to overwrite terms that already exist in the category, select the **Overwrite existing terms in target category** option.
- 5 Click **OK**.

Moving Glossary Entries

To move glossary entries, do the following:

- 1 Select one or several glossary entries in the list.
- 2 Click **Move** in the **Glossary** set of the **Actions** pane. This opens the **Move Glossary Term(s)** dialog.
- 3 Select the category you want to move the glossary entries to.
- 4 If you want to overwrite terms that already exist in the category, select the **Overwrite existing terms in target category** option.
- 5 Click **OK**.

Deleting Glossary Entries

To delete glossary entries, do the following:

- 1 Select one or several glossary entries in the list.
- 2 Click **Delete** in the **Glossary** set of the **Actions** pane. This opens the **Delete Term** dialog.
- 3 Click **OK** to delete the glossary entries.

Viewing Extended Information

If you want to view additional information on a glossary entry, e.g. who edited on what date or what was the content in various revisions, you can open the glossary entry in "Extended Form" mode.

To open the glossary in "Extended Form" mode, do the following:

- 1 Select the glossary entry in the list.
- 2 Click **Show Extended Form** in the **Glossary** set of the **Actions** pane. This opens the **Glossary** dialog.

Working with Products and Projects



When the use of Products and Project has been configured, the following icons show when selecting a product or project:

-  Opens the edit dialog for the selected product.
-  Opens the Product/Project Assignment Matrix.

When selecting the Product or Project category, only the icon to open the Product/Project Assignment Matrix is shown.

Using the Product/Project Assignment Matrix

Depending if you selected a product or a project, the Product/Project Assignment Matrix shows different values.

If a product has been selected, the Product/Project Assignment Matrix shows all projects for the selected product.

If a project has been selected, the Product/Project Assignment Matrix shows all products for the selected project.

If the Product or Project category (the root category for all products or projects) has been selected, the Product/Project Assignment Matrix shows all combinations for products and projects.

Showing Shared Requirements

To show shared requirements for a combination of product and project, click the table cell that intersects product and project. This opens the **Shared Requirements** dialog.

Configuring the View

-  Exchanges columns and rows (products and projects).
- **Show all** (in **Scope** menu): Shows the assignment matrix for all products and all projects.
- **Title** or **Short Name**: Shows either the full (possibly long) name or the short name of products and projects.

Resizing the Available Label Space

Depending on the length of *Product* names or *Project* names the default space may be too small. You can resize the space labels can occupy to match your needs.

To resize the available label space, do the following:

- 1 Move the mouse pointer to the left (for rows) or top (for columns) border of the matrix. The mouse pointer turns into a double-arrow.
- 2 Keep the left mouse button pressed and move the mouse pointer to increase or decrease the available space.
- 3 Release the left mouse button when done.

Copying Category Content

This feature is only available to Administrators (members of the Administrators group).

Copy Category Content copies requirements and documents therein and in child categories into another category. Child categories are created in the target category.



NOTE

- Proposals are not copied.
- Requirements are only copied if they have the status "Current".
- The following attribute values are not preserved:
 - **Initial Created By:** The new creator is the administrator who executed the copy process.
 - **Initial Time Created:** The date and time is the date and time the copy was created.
 - **Created By** and **Modified By:** Same as Initial "Created By".
 - **Time Created** and **Time Modified:** Same as Initial "Time Created".
 - **Workflow State:** The new Workflow state is the first state in the Workflow.
- Copied documents receive a "(copy_#)" suffix in their name with "#" replaced by the copy number.

Chapter 6

Working with Reports

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About Reports

A report allows you to query requirements by various conditions (e.g. category, creation date, or description). Users can create reports if the administrator permitted the creation of reports by setting the related access rights. Depending on access rights, users may also create public reports (which can then be accessed by other users as well). Note that reports may also be referred to as filters, queries, or scripts throughout this documentation.

Running Reports

To run a report:

- 1 Double-click the desired report in the Reports tab of the Home View. If you are currently displaying a report result, you can also select reports of the same type from the bread crumb which is located above the report results.
- 2 If the script has prompts, enter the information that is requested.
- 3 Click the **Run** button.



TIP

- The description of a report can be displayed as a tool tip when you hover your cursor over the report name.
- For multi-selection of requirements in class reports and relationship reports, see chapter "[Selecting Multiple Requirements](#)" on page 33.

Report Options and Functions

- **Filter by Categories:** If selected, the report only shows data matching the category in the **Categories** tree. If unselected, the report shows all data.

Note the following: If a report has constraints on one or more categories, it will override the category selected in the Categories tree. As a result, the report will show all requirements which match its category constraint.

- **Include Subcategories:** If selected, the report shows data from the selected category and its subcategories. Note that the **Include Subcategories** check box is only enabled, if **Filter by Categories** is selected.
- **Execution Date and Time:** Excluding Dashboards, the execution date is displayed at the top of every report, and is included on the report when exported.
- **Editable Grid:** "[Editable Grid View](#)" on page 30
- **Grid:** "[Grid View](#)" on page 32
- **Form:** "[Form View](#)" on page 32
- **Reload:** Reloads the report result
- **Expand:** Shows the report in full screen mode

- **Collapse:** ✖ Shows the report in standard mode
- **Close:** ✕ Closes the report
- **Switch to Gap View** and **Switch to Outline View:** For Traceability reports, you can change between Gap view and Outline view by clicking on the **Switch to Gap View** or **Switch to Outline View** in the **Actions** pane.

Relationship Reports

Relationship reports provide two modes to present data, **Table View**, and **Matrix View**. These modes are defined when creating the report. For further information on creating relationship reports, see chapter "[Creating a Relationship Report](#)" on page 257.

- **Table View:** The report is shown as a table with the source requirements on the left side of the report and the target requirements on the right side of the report.
- **Matrix View:** The report is shown in a matrix with the source requirements as rows and the target requirements as columns. Related requirements are marked at the intersection of column and row.

The colors of intersections have this meaning:

- **gray:** There is no link between the requirements.
- **blue:** The requirements are linked.
- **red:** The requirements are linked, but suspect.

If the **Show target items as rows** option is selected, the source requirements are shown as columns and the target requirements are shown as rows.

To create a link between two requirements do the following:

- a Run the report.
- b Click the gray square where both requirements intersect. This opens the **Create Link** dialog.
- c Click **OK** to create the link.

To delete the link between two requirements do the following:

- a Run the report.
- b Click the blue or red square where both requirements intersect. This opens the **Delete Link** dialog.
- c Click **OK** to delete the link.

To clear a suspect link between two requirements, do the following:

- a Run the report.
- b Right-click the red square where both requirements intersect.
- c Select **Resolve Suspicion** from the shortcut menu. This opens the **Resolve Suspicion** dialog.
- d Click **OK** to resolve the suspicion.

Running a Report with Run-time Parameters

Run-time parameters are attribute values which are not selected at report creation, but at the time the report is run. This allows you to create a report that can be used for different selections at the expense of selecting the attribute values each time before getting the results.

To run a report with run-time parameters, do the following:

- 1 Run a report as described in chapter ["Running Reports" on page 246](#).
- 2 Select all required or desired attribute values.
- 3 Click **Run Report**.

Selecting from a Group Attribute Run-time Parameter

Normally, all attributes have to match for making a query. As group attributes behave like a table with one or several values per row, the report allows to define how the values in should be considered for the search. You can select one of the following:

- AND
- OR

AND

A requirement is added to the result list if all values of the group attribute match all queried values.

Example:

- 1 Run a class report of class **Tests** that specifies the attribute **Operating System** as a run-time parameter.
- 2 In the group attribute boxes, select **Desktop, Windows, XP**.
- 3 Click  .
- 4 In the group attribute boxes, select **Desktop, Windows, Vista**.
- 5 Click  .
- 6 In the group attribute boxes, select **Desktop, Windows, 7**.

The result list contains requirements with the **Operating System** attribute having the combination of the following values: **Desktop-Windows-XP, Desktop-Windows-Vista** or **Desktop-Windows-7**.



NOTE The report also finds requirements that have extra values in the **Operating System** attribute.

OR

A requirement is added to the result list if any of the values of the group attribute matches at least one of the queried values.

Example:

- 1 Run a class report of class **Tests** that specifies the attribute **Operating System** as a run-time parameter.
- 2 In the group attribute boxes, select **Desktop, Windows, XP**.
- 3 Click  .
- 4 In the group attribute boxes, select **Desktop, Windows, Vista**.
- 5 Click  .
- 6 In the group attribute boxes, select **Desktop, Windows, 7**.

The result list contains requirements that contain either **Desktop-Windows-XP**, **Desktop-Windows-Vista** or **Desktop-Windows-7** (among other values) in its **Operating System** attribute.

Creating Reports

The following chapters describe how to create the different report types:

- ["Creating a Class Report" on page 249](#)
- ["Creating a Graphical Report" on page 250](#)
- ["Creating a Relationship Report" on page 257](#)
- ["Creating a Traceability Report" on page 259](#)

Creating a Class Report

Complete these steps to create a class report.



CAUTION! If you do not have "read" permission in a category, the requirements in that category are not returned in the query results, even if they satisfy the query requirements.

To create a class report:

- 1 Select **Class Report** from the **New** menu. The *Query By Class* dialog opens.
- 2 **Class:** Select the desired class from the list.



NOTE If a requirement of a class was selected when you invoked the dialog, then a class is already selected.

- 3 If you want to save the query:
 - a Enter a name in the **Name** box. The **Run** button changes to **Run and Save**.
 - b Select **Filter** or **Script** to identify the query type.

- c Type a description of the query in the **Description** box. The maximum number of characters is 1024.
- d In the **Category** list, select the category in which the query will be saved.
- 4 **Constraints:** As needed, specify criteria to locate the desired requirements. See "[Attribute Constraints Tab](#)" on page 43 and "[Relationship Constraints Tab](#)" on page 49.
- 5 **Display Options:** As needed, specify how to display the results. See "[Display Options Tab](#)" on page 52.
- 6 **View Script / View Wizard:** Click to toggle between the Wizard and Script views of the dialog.



NOTE The tabs are visible only in the Wizard view.

- 7 Do any of the following:
 - **Public Report:** Select this box to make the report public, otherwise the report is private.
 - **Visible for:** This option is only available if **Public Report** is selected. If selected, you can choose which groups can access the report. If unselected, only the user who created the report can access it.
 - **Editable for:** This option is only available if **Public Report** is selected. By default, this box has all groups selected which have the **Create Public** right. To allow members of groups without this right to edit this report, select the desired groups. If selected, you can choose which groups can edit the report. If unselected, only the user who created the report can modify it.
 - **Show in Subcategories:** Select this box to make the report accessible for subcategories of the category it was created in.
 - **Preview:** Click this button to run the report without saving the report or closing the dialog.
 - **Run:** Click this button to run the report and close the dialog without saving the report.
 - **Save As and Run:** Click this button to run and save the report. The dialog will close.

Creating a Graphical Report

Graphical Reports can use two report types:

- [Distribution Reports](#)
- [Trend Reports](#)

A Distribution Report presents the data at that moment the report was run.

A Trend Report presents the data over a time period.

Distribution Reports

Complete these steps to create a distribution report:

- 1 Select **Graphical Report** from the **New** menu. The *Graphical Report* dialog opens.
- 2 **Class:** Select the desired class from the list.



NOTE If a requirement of a class was selected when you invoked the dialog, then a class is already selected.

- 3 In the **required to save** group, select **Distribution Report** from the **Type** box.
- 4 If you want to save the report:
 - a Enter a name in the **Name** box. The **Run** button changes to **Save As and Run**.
 - b Type a description of the report in the **Description** box. The maximum number of characters is 1024.
- 5 In the **Category** list, select the category in which the report will be saved.
- 6 **Constraints:** As needed, specify criteria to locate the desired requirements. See ["Attribute Constraints Tab" on page 43](#) and ["Relationship Constraints Tab" on page 49](#).
- 7 **Display Options:**
 - a Select a style from the list of the **Chart Style** set. For more information on chart style and chart options, see chapter ["Display Options" on page 255](#).
 - b In the **Chart Content** set, select the attributes to be displayed in **Row** and **Column** boxes. Depending on the selected attribute, the following options are available:
 - **Include Zero Value Data:** Selecting it will include values with count 0.
 - **Level:** Available for group attributes. Selecting an entry defines which sub-attribute you wish to use in your report.
 - **Filter by Constraint:** Available if the **Row** box or **Column** box contains **<Collections>**, **<Baselines>**, **<Documents>**, or **<Snapshots>**. This will ensure that the report is limited by those constraints, irrespective of the number of containers that include selected objects.
 - c In the **Chart Content** set, an attribute may also be selected to be used to calculate totals displayed in **Sum Totals By**.



NOTE For Pie reports only the **Row** box is available.

Note that the **Row** and **Column** boxes do not include these attributes:

- Multi Line attributes
- HTML enabled attributes
- Date attributes

If desired, set the color for the report values. For more information on defining value colors for graphical reports, see section ["Defining Colors for Report Data" on page 256](#).

- 8 Do any of the following:
- **Public Report:** Select this box to make the report public, otherwise the report is private.
 - **Visible for:** This option is only available if **Public Report** is selected. If selected, you can choose which groups can access the report. If unselected, only the user who created the report can access it.
 - **Editable for:** This option is only available if **Public Report** is selected. By default, this box has all groups selected which have the **Create Public** right. To allow members of groups without this right to edit this report, select the desired groups. If selected, you can choose which groups can edit the report. If unselected, only the user who created the report can modify it.
 - **Show in Subcategories:** Select this box to make the report accessible for subcategories of the category it was created in.
 - **Preview:** Click this button to run the report without saving the report or closing the dialog.
 - **Run:** Click this button to run the report and close the dialog without saving the report.
 - **Save As and Run:** Click this button to run and save the report. The dialog will close.



TIP You can show the drill down of the data used in the report. If your report is a bar report, clicking on a bar in the report opens a list with the requirements which provided the data for that bar. This functionality is also available in all other graphical reports.

Trend Reports

Complete these steps to create a trend report:

- 1 Select **Graphical Report** from the **New** menu. The *Graphical Report* dialog opens.
- 2 **Class:** Select the desired class from the list.



NOTE If a requirement of a class was selected when you invoked the dialog, then a class is already selected.

- 3 In the **required to save** group, select **Trend Report** from the **Type** box.
- 4 If you want to save the report:
 - a Enter a name in the **Name** box. The **Run** button changes to **Save As and Run**.
 - b Type a description of the report in the **Description** box. The maximum number of characters is 1024.
- 5 In the **Category** list, select the category in which the report will be saved.
- 6 **Constraints:** As needed, specify criteria to locate the desired requirements. See "[Attribute Constraints Tab](#)" on page 43 and "[Relationship Constraints Tab](#)" on page 49.
- 7 **Display Options:** Select a style from the list of the **Chart Style** set. For more information on chart style and chart options, see chapter "[Display Options](#)" on page 255.

- 8 Select attributes in the **1st Field** and **2nd Field** boxes in the *Chart Content* set.



NOTE Note that the **1st Field** and **2nd Field** boxes do not include these attributes:

- Multi Line attributes
- HTML enabled attributes
- Date attributes
- Attributes which are surrounded with <> (e.g. <Collections>)

When working with list attributes, you may optionally select the **Include Zero Value Data** option. Selecting it will include values with count 0.

When working with group attributes, you may define which sub-attribute you wish to use by selecting it from the **Level** box. In addition, you may optionally select the **Include Zero Value Data** option. Selecting it will include values with count 0.

If desired, set the color for the report values. For more information on defining value colors for graphical reports, see section "[Defining Colors for Report Data](#)" on page 256.

- 9 Select the start date for your report from the **Start Date** box. The list contains a number of entries which define the start date in relation to the current date. This means that if you start a report on a different day, it will provide different data. To define a fixed start date, follow these steps:
- a Select **Since** from the **Start Date** box. This shows a date box next to the **Start Date** box.
 - b Click the calendar symbol in the date box.
 - c Select the desired date.
- 10 Select the end date for your report from the **End Date** box. You can select **Today** or **Until**. To define a fixed end date, follow these steps:
- a Select **Until** from the **End Date** box. This shows a date box next to the **End Date** box.
 - b Click the calendar symbol in the date box.
 - c Select the desired date. Note that the date must not be in the future.
- 11 Do any of the following:
- **Public Report:** Select this box to make the report public, otherwise the report is private.
 - **Visible for:** This option is only available if **Public Report** is selected. If selected, you can choose which groups can access the report. If unselected, only the user who created the report can access it.
 - **Editable for:** This option is only available if **Public Report** is selected. By default, this box has all groups selected which have the **Create Public** right. To allow members of groups without this right to edit this report, select the desired groups. If selected, you can choose which groups can edit the report. If unselected, only the user who created the report can modify it.
 - **Show in Subcategories:** Select this box to make the report accessible for subcategories of the category it was created in.

- **Preview:** Click this button to run the report without saving the report or closing the dialog.
- **Run:** Click this button to run the report and close the dialog without saving the report.
- **Save As and Run:** Click this button to run and save the report. The dialog will close.



NOTE To allow the Trend report to perform its calculations, it is essential that you **always use Replace** when editing a requirement. For further information about Replace and Update, see chapter "[Explaining Update and Delete Functions](#)" on page 101.



TIP You can show the drill down of the data used in the report. If your report is a bar report, clicking on a bar in the report opens a list with the requirements which provided the data for that bar. This functionality is also available in all other graphical reports.

Traceability Options

You can filter results of a graphical report by linked requirements. This would allow you to show only requirements that are linked to at least one of the specified classes. If desired, you could filter even further by only including requirements where the linked requirement(s) have one or several attribute values.

To limit results to requirements which have links to one or several classes:

- 1 Edit the desired graphical report.
- 2 Select the **Attribute Constraints** tab.
- 3 Click **Restrict by Related Class**. This opens the **Select Restricted Classes** dialog.
- 4 Expand and select the classes which a requirement must link to in order to be included into the result list.
- 5 Click **Save**. This closes the **Select Restricted Classes** dialog and shows the **Class** selector on the **Attribute Constraints** tab.

To define attribute constraints for a related class, do the following:

- 1 Select the **Attribute Constraints** tab.
- 2 From the **Class** selector, select the class for which you want to define attribute constraints.
- 3 Define the attribute constraints as desired.
- 4 Repeat steps 2 and 3 for any other class you want to define attribute constraints for.

Defining identical relationship constraints for related classes

If you define identical relationship constraints for the related classes, this means that all requirements (result and linked requirements) must fulfill the same relationship constraints, e.g. be part of the same document.

To define identical relationship constraints:

- 1 Select the **Relationship Constraints** tab.
- 2 Ensure that the **Apply for all classes** option is selected.
- 3 Edit the relationship constraints.

To define individual relationship constraints for related classes

If you define individual relationship constraints for the related classes, this means that there may or may not be relationship constraints for the result and linked requirements. For example, the result requirement may be required to be in one document, while a linked requirement may be required to be in a collection.

To define individual relationship constraints:

- 1 Select the **Relationship Constraints** tab.
- 2 Clear the **Apply for all classes** option.
- 3 From the **Class** selector, select the class for which you want to define relationship constraints.
- 4 Define the relationship constraints as desired.
- 5 Repeat steps 3 and 4 for any other class you want to define relationship constraints for.

Display Options**Chart Style****To change the chart style, do the following:**

- 1 Edit the desired graphical report.
- 2 Select the **Display Options** tab.
- 3 Expand the **Chart Style** section.
- 4 Select the desired style from the drop-down list.

Chart Content

The chart content differs for distribution reports and trend reports. Please refer to the following chapters for chart content: ["Distribution Reports" on page 251](#) and ["Trend Reports" on page 252](#).

To edit the chart content settings, do the following:

- 1 Edit the desired graphical report.
- 2 Select the **Display Options** tab.
- 3 Expand the **Chart Content** section.
- 4 Change the desired settings.

Chart Options

The chart options specify how to visualize the report data. The chart options depend on the selected chart style. For "Tabular" style see ["Tabular Options" on page 256](#), for all other styles see ["Common Options" on page 256](#).

Common Options

■ **Tooltip Options**

- **Show tooltips:** If selected, a tooltip is displayed when hovering report data.
- **Tooltip value type:**
 - **Absolute values:** The tooltip shows the count for the related data.
 - **Percentage values:** The tooltip shows the count for the related data in percent. This setting is only available for Pie charts.

■ **Label Options**

- **Show label values:** If enabled, the values for x-axis and y-axis are displayed.
- **Label value type:**
 - **Absolute values:** Shows the count for each data (e.g. bar on a 2D bar report).
 - **Percentage values:** Shows the count for each data in percent. This setting is only available for Pie charts.
 - **No values:** Shows only the attribute values for each data.

■ **Legend Options**

- **Show legend:** If selected, shows the legend underneath the x-axis.

■ **Axis Options**

- **Show x-axis name:** If selected, shows the label for the x-axis (e.g. attribute name).
- **Show y-axis name:** If selected, shows the label for the y-axis (e.g. count).

Tabular Options

■ **Sorting Options**

● **Row Sorting**

- **Alphabetical:** Sorts row values by alphabet (e.g. 1, 11, 111, 2, 3, a, b, c)
- **Numerical:** Sorts row values by number (e.g. 1, 2, 3)

● **Column Sorting**

- **Alphabetical:** Sorts column values by alphabet (e.g. 1, 11, 111, 2, 3, a, b, c)
- **Numerical:** Sorts column values by number (e.g. 1, 2, 3)

Defining Colors for Report Data

You can change the color used in the graph for the displayed values.



NOTE

- **For Distribution Reports:** When only the **Row** setting is defined, you can specify the color for values of the attribute specified in the **Row** box. If the **Column** setting is defined, you can only specify the color for values of the attribute specified in the **Column** box.
- **For Trend Reports:** When only the **1st Field** setting is defined, you can specify the color for values of the attribute specified in the **1st Field** box. If the **2nd Field** setting is defined, you can only specify the color for values of the attribute specified in the **2nd Field** box.

To define the color for a value in the graph, do the following:

- a Select the **Display Options** tab.
- b Expand the **Chart Options** set.
- c Click **Add Color**. This creates a new row.
- d **For list attributes:** In the **Value** box of the new row, select the desired value or keep the value **(None)** for empty attribute values.
For text attributes: Type the desired text into the **Value** box of the new row or leave it empty for empty attribute values.
- e Select one of the predefined colors or define one color in the color picker.

Creating a Relationship Report

Complete these steps to create a relationship report.



NOTES You can create a report if you do not have Create permission for scripts, but you cannot save it.



CAUTION! If you do not have the "read" permission in a category, the requirements in that category are not returned in the report results, even though they satisfy the report requirements.

To create a relationship report:

- 1 Select **Relationship Report** from the **New** menu. The *Query By Relationship* dialog opens.
- 2 **Relationship:** Select the relationship you want to report on.
- 3 If you want to save the report:
 - a Enter a name in the **Name** box. The **Run** button changes to **Save As and Run**.
 - b Type a description of the query in the **Description** box. The maximum number of characters is 1024.

c In the **Category** list, select the category in which the query will be saved.

4 Report Type tab:

a Select a **report view**:

- **Table View:** The report is shown as a table with the source requirements on the left side of the report and the target requirements on the right side of the report.
- **Matrix View:** The report is shown in a matrix with the source requirements as rows and the target requirements as columns. Related requirements are marked at the intersection of column and row.
If the **Show target items as rows** option is selected, the source requirements are shown as columns and the target requirements are shown as rows.

b Select a **report type**:

- **Full (compliance and non-compliance):** The report lists all requirements in the primary and secondary class, whether or not they are linked to each other.
- **Compliance only:** The report lists either:
 - All matching requirements in the primary class that have links to matching requirements in the secondary class
 - All matching requirements in the secondary class that have links to matching requirements in the primary class
- **Non-Compliance only:** The reports lists either:
 - All matching requirements in the primary class that have no links to matching requirements in the secondary class
 - All matching requirements in the secondary class that have no links to matching requirements in the primary class



NOTE The **Non-Compliance only** option is only available if the **Table View** option is selected.

A sample of the selected report type is displayed on the right hand side of the dialog.

5 **Constraints:** As needed, specify criteria to locate the desired requirements. There are these constraint tabs:

- **Constraints - Source** and **Constraints - Target** (see "[Attribute Constraints Tab](#)" on page 43)
- **Container - Source** and **Container - Target** (see "[Relationship Constraints Tab](#)" on page 49)

6 **Display Options:** As needed, specify how to display the results. See "[Display Options Tab](#)" on page 52.

7 **View Script / View Wizard:** Click to toggle between the Wizard and Script views of the dialog.



NOTE The tabs are visible only in the Wizard view.

- 8 Do any of the following:
- **Public Report:** Select this box to make the report public, otherwise the report is private.
 - **Visible for:** This option is only available if **Public Report** is selected. If selected, you can choose which groups can access the report. If unselected, only the user who created the report can access it.
 - **Editable for:** This option is only available if **Public Report** is selected. By default, this box has all groups selected which have the **Create Public** right. To allow members of groups without this right to edit this report, select the desired groups. If selected, you can choose which groups can edit the report. If unselected, only the user who created the report can modify it.
 - **Show in Subcategories:** Select this box to make the report accessible for subcategories of the category it was created in.
 - **Preview:** Click this button to run the report without saving the report or closing the dialog.
 - **Run:** Click this button to run the report and close the dialog without saving the report.
 - **Save As and Run:** Click this button to run and save the report. The dialog will close.

Creating a Traceability Report

Complete these steps to create a Traceability Report.



NOTE Permissions for traceability reports are treated the same way as permissions for scripts. If you do not have permission to create a script on the instance level, then you will be unable to create a traceability report. If you do not have permission to read a script on a instance level, then you will be unable to open a traceability report, unless you created the report.

- 1 Select **Traceability Report** from the **New** menu. The *New Traceability Report* dialog opens.
- 2 **Top-level class:** Select the root class for the report.
- 3 **Type:** Select one of the following:
 - a **Matrix:** The report shows the values for the related classes.
 - b **Coverage:** The report shows in percent how many requirements of a class are linked to the selected child class.
- 4 If you want to save the report:
 - a Enter a name in the **Name** box. The **Run** button changes to **Save As and Run**.
 - b Type a description of the query in the **Description** box. The maximum number of characters is 1024.
 - c In the **Category** list, select the category in which the query will be saved.
- 5 **Related Classes to Display tab:**

- Select the check boxes next to the classes to specify the relationships that should be displayed in the traceability report.



NOTE

- The check box next to the top-level class is always selected and disabled.
- To avoid cyclic dependencies, the check boxes next to relationships that are already used are also selected and disabled.
- You do not have to select consecutive classes.

- 6 Constraints:** As needed, specify criteria to locate the desired requirements. See "[Attribute Constraints Tab](#)" on page 43 and "[Relationship Constraints Tab](#)" on page 49.
- 7 Display Options:** As needed, specify how to display the results. See "[Display Options Tab](#)" on page 52.



NOTE The **Display Options** tab is only visible if the selected **Type** is **Matrix**.

- 8 Group By:** Contains these sections: **Collections**, **Baselines**, **Documents** and **Snapshots**. By selecting one or several entries from the lists, the result will be calculated in separate columns, one column for each selection.



NOTE The **Group By** tab is only visible if the selected **Type** is **Coverage**.

- 9 View Script / View Wizard:** Click to toggle between the Wizard and Script views of the dialog.



NOTE The tabs are visible only in the Wizard view.

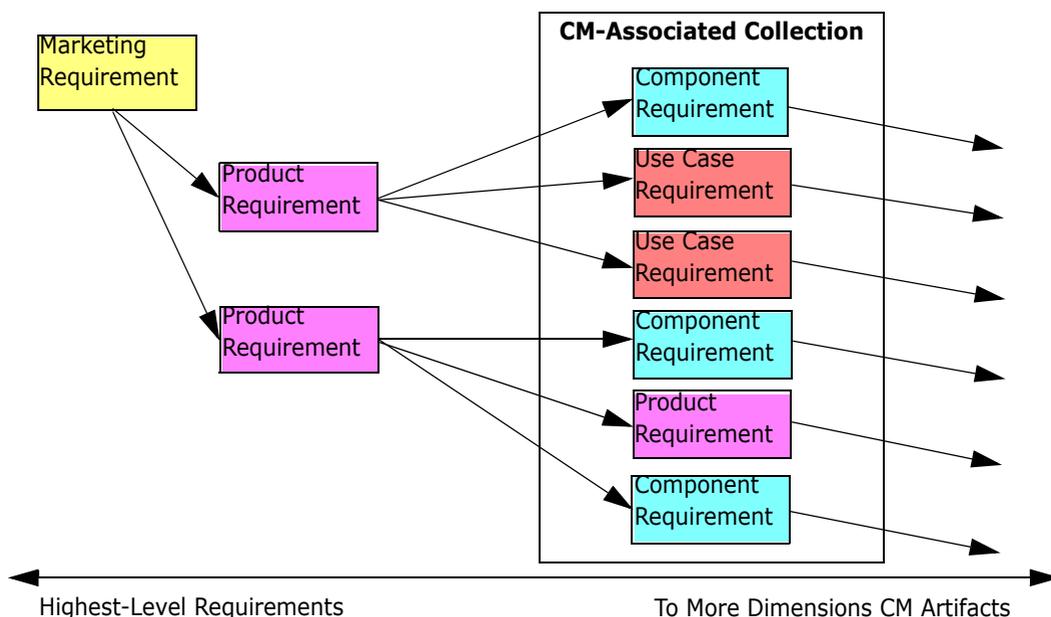
- 10** Do any of the following:
 - **Public Report:** Select this box to make the report public, otherwise the report is private.
 - **Visible for:** This option is only available if **Public Report** is selected. If selected, you can choose which groups can access the report. If unselected, only the user who created the report can access it.
 - **Editable for:** This option is only available if **Public Report** is selected. By default, this box has all groups selected which have the **Create Public** right. To allow members of groups without this right to edit this report, select the desired groups. If selected, you can choose which groups can edit the report. If unselected, only the user who created the report can modify it.
 - **Show in Subcategories:** Select this box to make the report accessible for subcategories of the category it was created in.
 - **Preview:** Click this button to run the report without saving the report or closing the dialog.
 - **Run:** Click this button to run the report and close the dialog without saving the report.

- Save As and Run:** Click this button to run and save the report. The dialog will close.

Working in the Traceability Work Page

Traceability is a way to analyze the linkages between requirements. It provides a way to select the relationships you want to trace, browse through the requirements that are part of the relationships, and then print traceability reports that display the information in a visual format that is easy to analyze.

Requirements in collections that are associated with Dimensions CM projects can be included in traceability reports. The following diagram illustrates such traceability.



The Traceability work page consists of a two panes: the left pane is the traceability tree with a top-level class from which related classes and requirements flow in a hierarchical format. The right pane displays information based on what you selected in the traceability tree.



NOTE Permissions for traceability reports are treated the same way as permissions for scripts. If you do not have permission to create a script on the instance level, then you will be unable to create a traceability report. If you do not have permission to read a script on a instance level, then you will be unable to open a traceability report, unless you created the report.

The Traceability work page includes the components described in the following table.

Component	Description
Traceability Tree	Contains a hierarchical presentation of requirements that belong to classes you selected when creating the traceability report. For more information about the traceability tree, see "Understanding the Traceability Tree" on page 262 .
Detail Pane	Shows the List view of the selected requirement, or the name and description of the selected report.

Understanding the Traceability Tree

Note the following points about the traceability tree:

- If you hover over a class that is not the top-level class, a tool tip displays the name of the relationship between that class and its parent class.
- Class labels show the relationship in parentheses if there is more than one label with the same class name but a different relationship.
- If you hover over a requirement, by default, a tool tip displays class and requirement ID of the requirement. You can add attributes that are displayed in the tool tip. For more information, see ["Customizing the Traceability Tree" on page 262](#).
- You can configure which attributes that you want to see in the traceability tree for each requirement. By default, the PUID and title of the requirement are displayed. For more information, see ["Customizing the Traceability Tree" on page 262](#).
- If you double-click a requirement, the **Edit Attributes** dialog box opens. However, if you double-click in an attribute in the requirements details in the right pane, you can edit the requirement content directly in place.
- A Dimensions CM indicator  is displayed next to each requirement in a collection that is associated with a Dimensions CM project. If a parent requirement is collapsed, and it has child requirements that are related to Dimensions CM, this indicator is shown on the parent requirement, even if the parent requirement itself is not related to Dimensions CM. When you expand the parent requirement, the indicator is shown on the child requirement, but is removed from the parent requirement.
- A suspect link indicator  is displayed next to each requirement that has suspect links. This indicator is informational only; clicking it does not remove the suspect status from the links.
- You can use the drag-and-drop operation to change parents within the tree. You can only change to a parent that has the same class and same path as the original parent. Be sure to drop the requirement on the new parent, not on a child requirement of the new parent.
- You can press the CTRL key and use the drag-and-drop operation to copy a requirement to another parent.
- To reload the tree, click the refresh icon at the top right of the tree.
- If the report was created in release 10.1.2.0 or earlier, a warning is displayed at the top of the tree informing you that changes you made in the **Traceability Properties** dialog box do not take effect until you save the report again.

Customizing the Traceability Tree

By default, the only attributes that are displayed in the traceability tree are the requirement PUID and title. You can configure the attributes that are displayed in the traceability tree for each class and for each instance. For example, it might be useful to see the associated SBM issue number, owner, and status. You can also configure tooltips to display attributes such as the requirement title instead of using space in the traceability tree to display this information.

To customize the traceability tree:

- 1 The traceability report must be shown in Outline View. If the traceability report is shown in Gap View, click **Switch to Outline View** in the **Actions** pane.

- 2 Click **Edit Attributes** in the **Reports** section of the **Actions** pane. This opens the **Properties for traceability reports** dialog.

Properties for traceability reports

Choose a class:

- Approval
- Component_Requirements**
- Defects
- Design
- Discussions
- ECPs
- Glossary
- Marketing_Requirements
- Product
- Product_Requirements
- Project
- Tests

ATTRIBUTES TO DISPLAY IN THE TREE

<Baselines> Rqmt ID
<Collections> Title
<Containers>
<Documents>
<Snapshots>
<Proposals>

ATTRIBUTES TO DISPLAY IN THE TOOLTIP

<Baselines> Rqmt ID
<Collections>
<Containers>
<Documents>
<Snapshots>
<Proposals>

OPTIONS

Separator: _____

OK Cancel



NOTE If the report was created in release 10.1.2.0 or earlier, a warning is displayed at the top of the dialog box that tells you that you need to save the report again before changes take effect.

- 3 Initially, the **Choose a class** list is the only field that is displayed. Select a class in the **Choose a class** list.
- 4 **Attributes to Display in the Tree:** To specify which attributes to display in the report, see chapter ["Attributes to Display List" on page 34](#).
- 5 **Attributes to Display in the Tooltip:** To specify which attributes to show in the tooltip, see chapter ["Attributes to Display List" on page 34](#).
- 6 In the **Separator** box, type the character you want to separate the attributes in the traceability tree and in the tooltips. The default character is a colon (:).

Editing a Report

To edit a report:

- 1 Select the desired report in the Reports tab of the Home View.
- 2 Click **Edit** in the **Reports** set of the **Actions** pane. Depending on your report either the edit dialog for the report type or the **Query By Script** dialog opens. The former is the wizard version of the dialog and is the default; the latter allows direct editing of the SQL-like script, and opens if the script cannot be edited with the wizard.
- 3 If you want to save the report:

- a Enter a name in the **Name** box. The **Run** button changes to **Run and Save**.
 - b Select **Filter** or **Script** to identify the query type.
 - c Type a description of the query in the **Description** box. The maximum number of characters is 1024.
 - d In the **Category** list, select the category in which the query will be saved.
- 4 As needed, modify the fields specific to the type of report you are editing:
- **Public Report:** Select this box to make the report public, otherwise the report is private.
 - **Visible for:** This option is only available if **Public Report** is selected. If selected, the user can select the user groups that can access the report. If unselected, only the user who created the report can access it.
 - **Editable for:** This option is only available if **Public Report** is selected. By default, this box has all user groups selected which have the **Create Public** right. To allow members of groups without this right to edit this report, select the desired groups. If selected, you can choose which user groups can edit the report. If unselected, only the user who created the report can modify it.
 - **Show in Subcategories:** Select this box to make the report accessible for subcategories of the category it was created in.
 - **Class Report - Class:** Select the desired class from the list.



NOTE If a requirement of a class was selected when you invoked the dialog, then a class is already selected.

- **Relationship Report - Relationship:** Select the relationship you want to report on.
- **Relationship Report - Report Type tab:** Select a report type:

Report Type	Description
Full (compliance and non-compliance)	The report lists all requirements in the primary and secondary class, whether or not they are linked to each other.
Compliance only	The report lists either: <ul style="list-style-type: none"> ■ All matching requirements in the primary class that have links to matching requirements in the secondary class ■ All matching requirements in the secondary class that have links to matching requirements in the primary class
Non-Compliance only	The reports lists either: <ul style="list-style-type: none"> ■ All matching requirements in the primary class that have no links to matching requirements in the secondary class ■ All matching requirements in the secondary class that have no links to matching requirements in the primary class

A sample of the selected report type is displayed on the right side of the dialog.

- **Traceability Report - Top-level class:** Select the root class for the report.
- **Traceability Report - Related Classes to Display tab:**
 - Select the check boxes next to the classes to specify the relationships that should be displayed in the traceability report.

**NOTE**

- The check box next to the top-level class is always selected and disabled.
- To avoid cyclic dependencies, the check boxes next to relationships that are already used are also selected and disabled.
- You do not have to select consecutive classes.

- 5 **Constraints:** As needed, specify criteria to locate the desired requirements. See ["Attribute Constraints Tab" on page 43](#) and ["Relationship Constraints Tab" on page 49](#).
- 6 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 52](#).
- 7 **View Script / View Wizard:** Click to toggle between the Wizard and Script views of the dialog.



NOTE The tabs are visible only in the Wizard view.

- 8 Do any of the following:
 - **Preview:** Click this button to run the report without saving the report or closing the dialog.
 - **Run:** Click this button to run the report and close the dialog without saving the report.
 - **Save As and Run:** Click this button to run and save the report. The dialog will close.

Renaming Reports

To rename a report follow these steps:

- 1 Open the **Reports tab** on the Home View.
- 2 Select the report
- 3 Click on **Rename** in the **Actions** pane
- 4 Enter the new name in the **Name** text box

- 5 Click on **Save**



NOTE

- For renaming relationship and traceability reports you need to have the **Rename permission for scripts** or you must be the owner of the report.
- For renaming class reports, you need to have the **Rename permission for filters** or you must be the owner of the report.

Deleting Reports

To delete a report:

- 1 Select the desired report in the **Reports tab** of the Home View.
- 2 Click **Delete** in the Reports group of the Actions pane. A confirmation dialog opens.
- 3 Click the **OK** button.

Exporting Report Results

To export report results, do the following:

- 1 Run the desired report.
- 2 Click **Export As** from the **Reports** set of the Actions pane. This opens the **Export As** dialog.
- 3 From the **Export as** box, select the desired format.

Click **Selected Page** or **All Pages** to start the export. Note that **All Pages** is only enabled if paging is enabled and you have more than one result page.

Moving and Copying Reports to a Different Category

You can move, or save a copy of, a report to another category.

To move a report to another category, do the following:

- 1 Open the Home View by clicking .
- 2 Select the desired category.
- 3 Select the **Reports** tab.
- 4 Drag the report and drop it at the desired category in the **Categories** tree.

To move/copy a report to another category:

- 1 Open the Home View by clicking .
- 2 Select the desired category.
- 3 Select the **Reports** tab.
- 4 Select the desired report.
- 5 Click **Edit** in the **Reports** group of the **Actions** pane. This opens the edit dialog for the selected report.
- 6 **Category:** Select the desired category.
- 7 Do one of the following:
 - To **save a copy** of the report to the selected category, modify the **Name** of the report and click the **Save As and Run** button.
 - To **move** the existing report to the selected category, click the **Save and Run** button.

Copying the URL of a Report to the Clipboard

You can copy the URL of a report and paste it into a file for future use and reference. When that URL is later invoked, it will open RM Browser to that report.

Copying the URL of a Report to the Clipboard

To copy the URL of a report:

- 1 Open the Home View by clicking .
- 2 Select the **Reports** tab.
- 3 Select a report.
- 4 Click **Create direct URL** in the **Reports** section of the Actions pane. This opens a dialog with the URL.
- 5 Select the URL and press **Ctrl + C**, or right-click on the highlighted URL and select **Copy** from the shortcut menu to copy the URL to the Clipboard.
- 6 Click **Cancel** to close the dialog.
- 7 Press **Ctrl + V**, or the relevant application-specific menu command, to paste the URL into the file or application where you wish to use it.

Modifying the URL of a Report

After pasting the URL into a file or application, you can also add parameters to it, which allows additional features. If you do not supply run-time parameters in the URL, you can specify them when running the report.

Function	Description	Example URL
Hide Title Bar	By default, the report shows a title bar with information about database, instance and path to the report. To hide the title, add <code>&hideTitleBar=true</code> to the URL.	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&db=ORCL&proj=RMDemo&reportID=1141&hideTitleBar=true</code>
Show Trace Report in Outline View	To view a trace report in Outline View, add <code>&outlineView=1</code> to the URL.	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&db=ORCL&proj=RMDemo&reportID=1141&outlineView=1</code>
Using Run-time Parameters	You can filter report results by using run-time parameters. These parameters can be used on any report. To add a run-time parameter, add <code>&<Parameter Name>=<value></code> to the URL. When providing run-time parameters, the value must be URL encoded (e.g. Café translates to <code>Caf%C3%A9</code>).	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&db=ORCL&proj=RMDemo&reportID=3522&RTP__VERIFICATION_LEVEL_1=System</code>
Using Multiple Values for a Run-time Parameter	You can use several values for a run-time parameter by combining the values with a <code> </code> symbol, e.g. <code>&TRP__VERIFICATION_LEVEL_1=System Module</code> .	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&db=ORCL&proj=RMDemo&reportID=3522&RTP__VERIFICATION_LEVEL_1=System Module</code>

Retrieving Run-Time Parameter Names

To get the names of the run-time parameters used in a report:

- 1 Paste the URL of the report into a text editor, e.g. Notepad. This URL will be referenced as **Report URL**.
Example URL: `http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&db=ORCL&proj=RMDemo&reportID=3522`
- 2 Copy the following URL to into a text editor: `http://host:port/rtmBrowser/RestServices/Report?id=<REPORT_ID>&db=<DATABASE>&proj=<INSTANCE>`
This URL will be referenced as **Rest URL**.

- 3 Adjust protocol (http or https), host and port of the Rest URL to match those of the Report URL.
- 4 Select the value of the **db** parameter of the **Report URL** and press **Ctrl + C**, or right-click on the highlighted value and select **Copy** from the shortcut menu to copy it to the Clipboard. In the example URL this value is *ORCL*.
- 5 Select **<DATABASE>** in the **Rest URL** and press **Ctrl + V**, or the relevant application-specific menu command, to replace it with the value you copied from the Report URL.
- 6 Select the value of the **proj** parameter of the **Report URL** and press **Ctrl + C**, or right-click on the highlighted value and select **Copy** from the shortcut menu to copy it to the Clipboard. In the example URL this value is *RMDEMO*.
- 7 Select **<INSTANCE>** in the **Rest URL** and press **Ctrl + V**, or the relevant application-specific menu command, to replace it with the value you copied from the Report URL.
- 8 Select the value of the **reportID** parameter of the **Report URL** and press **Ctrl + C**, or right-click on the highlighted value and select **Copy** from the shortcut menu to copy it to the Clipboard. In the example URL this value is *3522*.
- 9 Select **<REPORT_ID>** in the **Rest URL** and press **Ctrl + V**, or the relevant application-specific menu command, to replace it with the value you copied from the Report URL.
If you executed these steps with the example URL, the Rest URL would look like this:
`http://myserver:8080/rtmBrowser/RestServices/Report?id=3522&db=ORCL&proj=RMDEMO`
- 10 Select the complete **Rest URL** and press **Ctrl + C**, or right-click on the highlighted URL and select **Copy** from the shortcut menu to copy it to the Clipboard.
- 11 Open your preferred web browser and paste the URL into the address bar by pressing **Ctrl + V**. Then press **Enter**.
- 12 If you receive a dialog which requests user name and password, enter your RM user name and the associated password and confirm the dialog. In Internet Explorer, you might have to execute the following steps:
 - a Click **Open** in the **Do you want to open or save Report.json** bar.
 - b In the next dialog select the **Select a program from a list of installed programs** option and click **OK**.
 - c In the **Open with** dialog, select **Notepad** or another plain text editor.
 - d Clear the checkbox **Always use the selected program to open this kind of file**.
 - e Click **OK**.
- 13 Search for **RTP__** (note that there are 2 underscores).
- 14 Select the full parameter (e.g. *RTP__VERIFICATION_LEVEL_1*) and add it to your Report URL.
- 15 Add an equal sign and the URL encoded value (e.g. translates to *Caf%C3%A9*).
If you executed these steps with the example URL, the Report URL would like this:
`http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&db=ORCL&proj=RMDEMO&reportID=3522&RTP__VERIFICATION_LEVEL_1=System`

16 You can now use the Report URL in your file or application.

Chapter 7

Working with Collections and Baselines

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About Collections

Collections are named groups of requirements from one or more classes. Collections provide a simple way to gather and organize requirements. Each requirement can be linked to many different collections, and each collection to many different requirements. In RM Browser, you can add requirements to a collection, remove requirements from a collection, and add, delete, rename, or baseline a collection.



CAUTION! When you display the content of a collection, you only see the requirements for which you have permissions in the category to which the requirements belong.

About Baselines

In Dimensions RM, baselines are stable, unchangeable groups of requirements. In other words, baselines are collections that have been "frozen."

Note the following:

- Baselines and collections are separate entities. A baseline is a copy of a collection with special controls that keep the requirements in the baseline from being updated. A baseline is always referred to as a "baseline." A collection is referred to as a "collection."
- After a baseline is created, you can rename or delete it if you have permission to do so.



NOTE You cannot rename a baseline that was created from Dimensions CM using the ALM integration.

- You can create a baseline based on a collection, or a collection based on a baseline.
- The original collection from which the baseline was created remains unchanged and can be modified later.
- If you try to edit a requirement in a baseline, a message informs you that you cannot change the requirement, and that your changes will create a new version of the requirement.
- When you create a collection from an existing collection, the latest versions of the requirements are used.
- By default, links between objects in the baseline are also included in the baseline, and cannot be modified once the baseline is created. You may be able to modify links in a baseline depending on how your administrator has configured the instance. (See chapter "[Deleting or Removing Links](#)" on page 126.)
- Requirements with suspect links remain suspect even after they are baselined.
- You can clear suspect links from a requirement even if the requirement is baselined.
- Even if the administrator denied you the Delete Baseline and Rename Baseline permissions, you can delete and rename a baseline if you created it. In other words, in this situation, the permissions that are denied by the administrator are overridden.

- A baselined requirement has a lock icon in its banner in the **Edit Attributes** dialog, and the **Update** button is disabled. If you mouse over the icon a popup will appear that says: Baseline Locked.
- You can base a baseline on a query, that will generate dynamically when you run it.

Collection Basics

Opening a Collection to the Collection Work Page

To open a collection:

- 1 Open the Home View by clicking .
- 2 Select the desired category.
- 3 Select the **Collections** tab.
- 4 Double-click the desired collection to open the Collection work page.

Creating a New Collection

To create a collection:

- 1 Select **Collection** from the New menu. The Manage Containers -> New dialog opens.
- 2 **Collection Name:** Enter the name of the new collection.



NOTE

- Do not use Oracle reserved words in collection names.
- A collection name can contain a maximum of 256 characters.

- 3 **Description:** Enter a description of the collection. The maximum length of the description is 512 characters.
- 4 **Category:** Select an owning category from the list.
- 5 **Collection Rules:** Define the collection link rules to determine what happens to object links when you edit objects included in the collection. The options include the following:
 - **Add new version to collection on Edit & Replace:** When you edit the primary object and create a new child object, the links from the primary object are transferred to the new child object.
 - **Delete old version from collection on Edit & Replace:** When you edit the instance object and create a new child object, the links from the primary (parent) object are deleted.
 - **Revert to previous version on Remove:** If you delete a child object, links are transferred to the parent.
 - **Objects can be added/removed:** Select to allow requirements to be added or removed to the collection.

- **Remove deleted objects from collection:** Select to remove any object from a collection if the object has been deleted. If this option is disabled, the collection will keep objects with Current Status **Deleted**.
 - **Use these rules as the default for new collections:** Select to automatically apply the above collection rules to all new collections in the future.
- 6 Based on:** Select one of the following options to determine how the collection is initially populated:
- **Empty Collection:** Select this if you do not want to base the new collection on an existing container.
 - **Selected Container(s):** Select this if you want to base the new collection on one or more existing containers. Then select one or more containers in the list. To select multiple containers, hold down the Control key while you select the containers. To select a range of containers, select the first container, press the Shift key, and then select the last container. When the new collection is created, all requirements of the selected container(s) are associated with it.
 - **Query:** Select this if you want to place the results of a query in the new collection. Then select the desired report.



TIPS

- To limit the listed reports to those of a specific category, select a category from the **Query** category list. To quickly locate a category in the list, type the name of the category in the **Find** box of the expanded category list.
- To limit the number of displayed queries, type part of the query name you want to use into the **Find Query** box.

- 7** Click the **Add** button.

Deleting a Collection

To delete a collection:

- 1** Open the Home View, if it is not already open. For further information on the Home View, see chapter ["Working with the Home View" on page 227](#).
- 2** Select the **Collections** tab.
- 3** Select one or several collections.
- 4** Click **Delete** in the **Collections** set of the **Actions** pane.
- 5** Click **OK** to confirm deletion.

Managing Requirements in a Collection

You search for requirements from the **Organize by Collection** dialog box and then select the ones you want to add to or remove from a collection. You can specify search criteria on any or all of the three tabs on the **Organize by Collection** dialog box if you want to

narrow search results or specify how the search results are displayed. You can run the search from any of the tabs.



TIP For a small and/or simple set of requirements, you can simply select them in a work page and click a button to add them to a collection. See ["Adding Requirements to an Existing Collection" on page 139](#).

To add/remove requirements to/from a collection:

- 1 If the collection is not already open, open it to a work page.
- 2 Select **Organize by Collection** from the Collections group of the Actions pane. The **Organize by Collection** dialog opens.
- 3 **Look for Class:** Select the class in which you want to search for requirements.
- 4 **Filters:** If you saved filters in Quick Search, you can use these filters to add to the collection.
- 5 **Constraints:** As needed, specify criteria to locate the desired requirements. See ["Attribute Constraints Tab" on page 43](#) and ["Relationship Constraints Tab" on page 49](#).
- 6 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 52](#).
- 7 **Find Now:** Click this button to run the search. The results are displayed in the lower pane of the dialog.
- 8 **New Search:** Click this button to clear the current search criteria and results.
- 9 Select the desired requirements in the search results. For multi-selection of requirements, see chapter ["Selecting Multiple Requirements" on page 33](#).
- 10 **Collection:** Select the collection to which you want to add or remove requirements.
- 11 Click one of the following buttons:
 - **Add:** To add the selected requirements to the collection.
 - **Remove:** To remove the selected requirements from the collection.

Refreshing the Contents of a Collection

It is possible for the administrator to set an instance-wide option to automatically refresh all collections based on queries or scripts. This setting defaults to off (unchecked) for both performance and control. To activate/deactivate this option, see chapter ["Container: Automatic Refresh" on page 75](#).

If automatic refresh is off, the collection content must be refreshed manually.

To manually refresh the contents of a collection, execute these steps:

- 1 Select a collection on the **Collections** tab of the Home View. For information on the Home View, see chapter ["Working with the Home View" on page 227](#).

- 2 In the **Requirements** set of the **Actions** pane, click **Refresh Collection**.



NOTE The **Refresh Container** action will be grayed out if the selected collection is not based on a report.

Updating Collection Properties

You can rename and change the description for a collection, and modify the collection rules that define how and whether new child objects should be included in the collection.

To edit the properties of a collection:

- 1 Open the Home View, if it is not already open. For further information on the Home View, see chapter "[Working with the Home View](#)" on page 227.
- 2 Select the **Collections** tab.
- 3 Select the desired collection.
- 4 Click **Edit Properties** from the **Collections** set of the **Actions** pane. This opens the **Manage Containers > Properties** dialog.
- 5 Modify the name, description and collection rules as needed. See "[Creating a New Collection](#)" on page 273 for information on defining collection rules.
- 6 Click **OK** to confirm your changes.

Baseline Basics

Opening a Baseline to the Baseline Work Page

To open a collection:

- 1 Open the Home View by clicking .
- 2 Select the desired category.
- 3 Select the **Baselines** tab.
- 4 Double-click the desired collection to open the Collection work page.

Creating a New Baseline

To create a baseline:

- 1 Select **Baseline** from the **New** menu. The **Manage Containers** dialog opens.

- 2 **Baseline Name:** Enter a name for the baseline.



NOTE

- Do not use Oracle reserved words in baseline names.
- A baseline name can contain a maximum of 256 characters.

- 3 **Description:** Enter a description of the baseline. The maximum length of the description is 512 characters.
- 4 **Category:** Select the category where you will store the baseline. You can add a baseline to any category to which you have access.



TIP To quickly locate a category in the list, type the name of the category in the **Find** box of the expanded **Category** list.

- 5 Select one of the following options:
 - **Based on Selection Container(s):** Select this if you want to baseline one or more collections or baselines. Then select one or more collections or baselines or a combination of collections and baselines from the list of containers. To select multiple containers, hold down the Control key while you select the containers. To select a range of containers, select the first container, press the Shift key, and then select the last container. When the new baseline is created, all requirements of the selected container(s) are associated with it.
 - **Based on Query:** Select this if you want to baseline the results of a query. Then select the desired report.



TIP To limit the listed reports to those of a specific category, select a category from the **Based on Query** category list. To quickly locate a category in the list, type the name of the category in the **Find** box of the expanded category list.

- 6 Click the **Create Baseline** button.

Deleting a Baseline

To delete a baseline:

- 1 Open the Home View, if it is not already open. For further information on the Home View, see chapter ["Working with the Home View" on page 227](#).
- 2 Select the **Baselines** tab.
- 3 Select one or several baselines.
- 4 Click **Delete** in the **Baselines** set of the **Actions** pane.
- 5 Click **OK** to confirm deletion.

Updating Baseline Properties

You can rename and change the description for a baseline, or change its workflow assignment.

To edit the properties of a baseline:

- 1 Open the Home View, if it is not already open. For further information on the Home View, see chapter ["Working with the Home View" on page 227](#).
- 2 Select the **Baselines** tab.
- 3 Select the desired baseline.
- 4 Click **Edit Properties** from the **Baselines** set of the **Actions** pane. This opens the **Manage Containers > Properties** dialog.
- 5 Modify the name, description and workflow assignment. See ["Creating a New Baseline" on page 276](#) for information on defining collection rules.
- 6 Click **OK** to confirm your changes.

Comparing Collections or Baselines

To compare the contents of two collections or baselines:

- 1 Open the Home View, if it is not already open. For further information on the Home View, see chapter ["Working with the Home View" on page 227](#).
- 2 Select the **Collections** or **Baselines** tab.
- 3 Select the desired collection or baseline.
- 4 Click **Compare** from the **Collections** or **Baselines** set of the **Actions** pane. This opens the **Compare Containers** dialog.
- 5 **Select Container:** Click ... to select the collection or baseline to compare.
- 6 **Description:** Select this option to display each container's description in the results.
- 7 Click the **Compare** button. The Requirement Difference Summary dialog opens. The summary lists the Requirement ID, Title, Description (if the **Description** check box is selected in the Find Container dialog box), and the class for the following results:
 - **Requirements only in container:** This is a list of the requirements that are in the first container, but not in the second container.
 - **Requirements only in container:** This is a list of the requirements that are in the second container, but not in the first container.
 - **Changed requirements:** This is a list of the changed requirements in both containers. This list includes items for which the Object Version ID is different, even if the Requirement ID is the same.
 - **Unchanged Requirements:** This is a list of the unchanged requirements in both containers.
- 8 To open a details view of a requirement, double-click the requirement.
- 9 **Print:** Click this button to print the **Requirement Difference Summary**.

Using Workflows with Collections or Baselines

If configured by your administrator, you can use Workflows with collections and baselines.

Assigning a Collection or Baseline to a Workflow

To assign a collection or baseline to a workflow, do the following:

- 1 Open the collection (see chapter ["Opening a Collection to the Collection Work Page" on page 273](#)) or baseline (see chapter ["Opening a Baseline to the Baseline Work Page" on page 276](#)).
- 2 Click **Edit Properties** in the **Collections** or **Baselines** group of the **Actions** pane. This opens the **Manage Containers > Properties** dialog.
- 3 From the **Workflow** box, select the desired workflow.



CAUTION! Once you confirm the dialog, the Workflow setting for the collection or baseline cannot be changed. Thus, verify that you selected the correct workflow.

- 4 Click **OK**.

Executing a Transition on a Collection or Baseline

In order to use a workflow with a collection or baseline, a Workflow must be assigned to that container (see chapter ["Assigning a Collection or Baseline to a Workflow" on page 279](#)).

To execute a transition, do the following:

- 1 Open the collection (see chapter ["Opening a Collection to the Collection Work Page" on page 273](#)) or baseline (see chapter ["Opening a Baseline to the Baseline Work Page" on page 276](#)).
- 2 Click the button for the desired transition, which is located underneath the **Welcome** menu in the top right corner of the screen. Executing the transition may open a form for input which must be filled out to complete the transition.

Next to the transition button(s), you find a progress bar, which shows the current state. If configured by your administrator, the value of the progress bar may change according to the workflow state.

Viewing Information about a Collection or Baseline

If a collection or baseline is assigned to a workflow, you can use the same functions as for requirements, e.g. view/modify attributes or see the state change history, or execute a transition.

To open the container information, do the following:

- 1 Open the collection (see chapter ["Opening a Collection to the Collection Work Page" on page 273](#)) or baseline (see chapter ["Opening a Baseline to the Baseline Work Page" on page 276](#)).

- 2 Click the progress bar showing the current state. This opens the **Edit Attributes** dialog for the container.

For further information about the **Edit Attributes** dialog, see ["Editing a Requirement" on page 114](#) (start with point 2 of the list) and ["Workflows" on page 105](#).

Moving Collections or Baselines to a Different Category

When you create a collection or baseline, you can assign it to a category. The following procedure describes how to change the category assignment of an existing collection or baseline.

- 1 Open the Home View by clicking .
- 2 Select the desired tab: **Collections**, or **Baselines**.
- 3 Drag the object and drop it at the desired category in the **Categories** tree.

Copying the URL of a Collection or Baseline to the Clipboard

You can copy the URL of a collection or baseline and paste it into a file for future use and reference. When that URL is later invoked, it will open RM Browser to that collection or baseline.

To copy the URL of a collection or baseline:

- 1 Go to the **Home View**.
- 2 Select either the **Collections** tab or the **Baselines** tab.
- 3 Select the desired collection or baseline.
- 4 Click **Create direct URL** in the associated group of the Actions pane. A dialog opens with the URL selected.
- 5 Press **Ctrl + C**, or right-click the highlighted URL and select **Copy**. The URL is now on the Windows clipboard.
- 6 Click **OK** to close the dialog.
- 7 Use **Ctrl + V**, or the relevant application-specific menu command, to paste the URL into the file or application where you wish to use it.

Modifying the URL of a Collection or Baseline

After pasting the URL into a file or application, you can also add parameters to it, which allows additional features. If you do not supply run-time parameters in the URL, you can specify them when running the report.

Function	Description	Example URL
Editable Grid	By default, the requirements of collection or baseline are shown in a normal table. To use an editable grid instead, add &editableGrid=true to the URL.	<code>http:// myserver:8080/ rtmBrowser/cgi-bin/ rtmBrowser.exe?goto =collection&db=ORCL &proj=RMDEMO&collec tionId=5&editableGr id=true</code>
Hide Title Bar	By default, the collection or baseline shows a title bar with information about database, instance and path to the report. To hide the title, add &hideTitleBar=true to the URL.	<code>http:// myserver:8080/ rtmBrowser/cgi-bin/ rtmBrowser.exe?goto =collection&db=ORCL &proj=RMDEMO&collec tionId=5&hideTitleB ar=true</code>

Chapter 8

Importing Requirements

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Importing Requirements from Microsoft Word Documents

RM Browser can import content from a Microsoft Word document and use it to:

- Create new requirements
- Create new requirements and an RM document
- Update or Replace existing requirement versions

When importing a Word document, you can choose to import:

- The entire document (creating an RM document)
- Only the requirements (that are in the proper table format)
- Only the selected text (into attributes you specify at run time)



NOTE The Dimensions RM document or the requirements that were created or updated during import will not have the exact layout and/or style as the original MS Word document.

Should I Use RM Browser or RM Import?

Layout/Format: The import feature of RM Browser requires that the Word document be of the expected layout and format (as described in the following sections). Whereas RM Import requires that you create an import template that defines the layout and format that is to be expected. The latter is more flexible, but also more time consuming to setup.

Subrequirements: Only RM Import can import subrequirements or tables within tables.



NOTE

- Importing Microsoft Word documents through RM Browser is only possible if Microsoft Word is installed on the server. For further information on installing Microsoft Office on the server see chapter "Support for Publishing / Word Import" in *Dimensions RM Installation Guide*.
- RM Import requires Microsoft Word and Microsoft Excel to be installed on the client.

Formatting Requirements for Import

The requirements in your document must be in tables that use the correct layout and formatting in order to be recognized as requirements.

There are two main layout options when creating tables for requirements:

- Each row is a requirement:

Title	Text	Category	Delivery Phase
EPhoto will be an online photo album	This ePhoto system shall enable the user to browse an on-line photo album.	RMDEMO/Functional/Design	Build1 Build4
Displaying stored photo info	The ePhoto system shall allow users to display any of the information stored with the photo.	RMDEMO/Availability/Cost	TBD Build3

- Each table is a requirement:

TITLE	Runs on "standard" home PC		
Priority	Paragraph Title	Document ID	
1	Feature 3	Marketing Rqmts	
Category	RMDEMO/Power	Delivery Phase	Build1 TBD
Text	The ePhoto system shall be accessible to the user from a regular home PC environment running standard Windows software. It is envisaged that this is a software-only application from the user's perspective.		

And there are two ways to organize the requirements by class:

- Specify the class for the entire table in the first row:

Class Name	Marketing_Requirements		
Rqmt ID	Title	Text	
MRKT_000001	EPhoto will be an online photo album	This ePhoto system shall enable the user to browse an on-line photo album.	
MRKT_000023	Displaying stored photo info	The ePhoto system shall allow users to display any of the information stored with the photo.	

- Specify the class of each requirement:

Class Name	Rqmt ID	Title	Text
Marketing_Requirements	MRKT_000001	EPhoto will be an online photo album	This ePhoto system shall enable the user to browse an on-line photo album.
Product_Requirements	PROD_000023	Load time less than 5 seconds	The load time for an individual photo load shall be less than 5 seconds.



NOTE The following rules apply when formatting requirement tables:

- Pay attention to **bold/regular** formatting:
 - **Attribute names** (*not* values) **must use bold** formatting.
 - **All values** (requirement content) **must not use bold** formatting. Even a single bold formatted blank space in the midst of properly formatted text will cause the text to be treated as an attribute name rather than as an attribute value.
 - When adding the class name above the attribute names (as in above example), both, **Class Identifier** and **attribute name** ("Class Name" in the above example) **must not use bold** formatting.
- General text formatting (color, underline, italic, etc.) is imported for text attributes and ignored for others. (As noted above, bold must not be used in attribute values.)
- **Class Name** is the attribute name for class used in the above examples; however, you can specify a different attribute name in the **Class Identifier** field when importing the document.
- **Category** must match the supported formats (see chapter "[Category Import Formats](#)" on page 289).
- The document may contain any number of tables.
- Tables may contain any number of rows (requirements) and any number of columns (attributes).
- To specify multiple values for a list attribute, separate the values with the pipe (|) character. For example: Build1|Build4
- To Update/Replace an existing RM requirement, include its **Rqmt ID** attribute (PUID).
- The Group attribute type is not supported for import.
- During import, you will be prompted for any mandatory attribute values that are not included in the tables.
- Images can be imported into the body of an RM document, but not into requirements.

Formatting an Entire Word Document for Import

If you choose to import an entire Word document:

- Requirement data will be imported from properly formatted tables (as described in "[Formatting Requirements for Import](#)" on page 284).

- Chapters and sub chapters will be created based upon the heading hierarchy of the Word document.

Word Document	RM Document
Heading 1	Chapter
Heading 2	Sub-chapter
Heading 3	Sub-sub-chapter
etc.	

- Images will be imported into body content (not into requirements).
- General text formatting will be imported.



IMPORTANT! It is strongly recommended that the document should have a Table of Contents.

Importing a Word File

The MS Word import of RM Browser has several import modes from which you can choose. The following sections describe these import methods individually.

Importing a Word Document in Entire Document (Chapters only) Mode

The **Entire Document (Chapters only)** mode will import the document "as is". Tables are **not** parsed as requirements. If you wish to import a document that contains tables with data other than requirements, you might choose this mode and then convert chapters to requirements using the **Change Class** function as described in chapter "[Converting Chapters into Requirements](#)" on page 206.

To import a Word document:

- In RM Browser, select **Word document** from the **Import** menu. This opens the **Import Word Document** dialog.
- Import File:** Click **Browse...** to open a dialog to select the Word file.
- Select the Word file, and then click **Open**.
- Import Mode:** Select **Entire Document (Chapters only)** from the drop-down list.
- Choose whether to **Create**, or **Replace** content from the Word document.
 - Create** will create a new document in Dimensions RM.
 - Replace** will replace an existing document using the new content from the Word document. Select the document you wish to replace in the list of documents.



TIP To easily find a document, enter part of the name into the **Find Document** box.

- Category:** Select the category into which you wish to import the document.
- Document Name:** Specify a name for the RM document that is to be created or revised.

- 8 Click **Import**. After the import has been completed, the **Import Results** dialog opens. This dialog includes information about the requirements that were created and a summary.
- 9 Click **Close** to dismiss the results.
- 10 Click **Close** on the remaining MS Word Import dialog.

Importing a Word Document in Entire Document Mode

The **Entire Document** mode imports the document with chapters and expects tables to contain requirements only. To import documents with tables that do not contain requirements, either use the **Entire Document (Chapters only)** mode (see chapter ["Importing a Word Document in Entire Document \(Chapters only\) Mode" on page 287](#)) or use RM Import.

To import a Word document:

- 1 In RM Browser, select **Word document** from the **Import** menu. This opens the **Import Word Document** dialog.
- 2 **Import File:** Click **Browse...** to open a dialog to select the Word file.
- 3 Select the Word file, and then click **Open**.
- 4 **Import Mode:** Select **Entire Document (Chapters only)** from the drop-down list.
- 5 Choose whether to **Create**, or **Replace** content from the Word document.
 - **Create** will create new requirements in Dimensions RM.
 - **Replace** will replace an existing document and create new versions of existing requirements using the new content from the Word document. Only existing requirements that have new values in the Word document will be replaced. Select the document you wish to replace in the list of documents.



TIP To easily find a document, enter part of the name into the **Find Document** box.

- 6 **Class Identifier:** Specify the attribute name you used to identify the class. For example, `Class Name`.
- 7 **Category:** Select the category into which you wish to import the document.
- 8 **Document Name:** Specify a name for the RM document that is to be created or revised.
- 9 Click **Import**. After the import has been completed, the **Import Results** dialog opens. This dialog includes information about the requirements that were created and a summary.
- 10 Click **Close** to dismiss the results.
- 11 Click **Close** on the remaining MS Word Import dialog.

Importing a Word Document in Roundtrip Import Mode

The Roundtrip Import mode is required for importing a Roundtrip document. For further information on importing roundtrip documents, see chapter "[Importing a Roundtrip Document](#)" on page 290.

Importing a Word Document in Tables only Mode

The **Tables only** mode will only import requirements by retrieving them from tables. The surrounding document is not imported.

To import a Word document:

- 1** In RM Browser, select **Word document** from the **Import** menu. This opens the **Import Word Document** dialog.
- 2** **Import File:** Click **Browse...** to open a dialog to select the Word file.
- 3** Select the Word file, and then click **Open**.
- 4** **Import Mode:** Select **Entire Document (Chapters only)** from the drop-down list.
- 5** Choose whether to **Create**, or **Replace** content from the Word document.
 - **Create** will create new requirements in Dimensions RM.
 - **Replace** will create new versions of existing requirements using the new content from the Word document. Only existing requirements that have new values in the Word document will be replaced.
- 6** Select **Tables only** from the drop-down list.
- 7** **Class Identifier:** Specify the attribute name you used to identify the class. For example, `Class Name`.
- 8** Click **Import**. After the import has been completed, the **Import Results** dialog opens. This dialog includes information about the requirements that were created and a summary.
- 9** Click **Close** to dismiss the results.
- 10** Click **Close** on the remaining MS Word Import dialog.

Category Import Formats

For Word import, categories can be specified in these formats:

- Full path with forward slash, e.g. `RMDEMO/Data`
- Full path with backslash, e.g. `RMDEMO\Data`
- Unique category name, e.g. `Data`
Note that there must be no other category or sub-category "Data".

Date Import Formats

Word import requires that the date specified in a Word document matches the format for the attribute of the requirement class you wish to import.

Importing a Roundtrip Document

If you published a document as a Roundtrip document (see chapter "[Publish as a Roundtrip Document](#)" on page 218), you can also import this Roundtrip document on the system that published it.



NOTE You can only import the document on a system where the IDs in the document match those of the system.

The Roundtrip import function recognizes the following changes in the document:

- Chapter additions, modifications, deletions, or moves;
- Requirement modifications, deletions, or moves.

To import of a Roundtrip document, do the following:

- 1 In RM Browser, select **Word document** from the **Import** menu. This opens the **Import Word Document** dialog.
- 2 **Import File:** Click **Browse...** to open a dialog to select the Word file.
- 3 Select the Word file, and then click **Open**.
- 4 **Import Mode:** Select **Entire Document (Chapters only)** from the drop-down list.
- 5 Ensure that **Replace** has been selected from the list.

Replace will create new versions of existing requirements using the new content from the Word document. Only existing requirements that have new values in the Word document will be replaced.



NOTE Roundtrip import cannot be used with the **Create** function.

- 6 From the **Import Mode** box, select **Roundtrip**.
- 7 Click **Import**. After the import has been completed, the **Import Results** dialog opens. This dialog includes information about the requirements that were created and a summary.
- 8 Click the **Close** button to dismiss the results.
- 9 Click the **Close** button on the remaining MS Word Import dialog.

Importing Requirements from an XML File

You can easily add, update, or replace large batches of requirements. Save your query results as an XML file, make changes to the requirements with an editor such as Microsoft Word or Notepad, and then import your changes using the XML import feature.

For example:

A requirements manager wants to change the "priority" attribute of 100 requirements from "Must" to "Hope." She opens RM Browser and runs the desired script. She saves the query results as an XML file. In the XML file, she changes the "priority" attribute and saves the updated XML file.

The requirements manager now imports the XML file by completing the **Import XML** dialog box. After the import process completes, an import results page opens that displays the class name, PUID, status, and error details for each requirement.

To import an XML file:

- 1 Select **XML file** from the **Import** menu. The **Import XML** dialog opens.

- 2 In the **Import File** field, type the path and file name of the XML file you want to import or click **Browse** to navigate to the file.
- 3 In the **Import Data Into** list, select the class into which you are importing the file.
- 4 In the **Import Mode** list, select one of the following options:

Mode	Description
Create	Creates a new requirement if the object node in the XML file does not exist.

Mode	Description
Update	Updates the attributes that have changed for each object node in the XML file.
Replace	Creates a new current revision for each object node in the XML file with the changes to the attributes specified in the XML file.

- 5 If you want to create a new requirement when a requirement in the XML file has an object ID that does not match the object ID of a requirement in the database, select the **Create new requirement if requirement is not found** check box. This option is only available for the **Update** and **Replace** modes.
- 6 Under **Import Options**, select one or more options as described in the following table:

Option	Description
Use default value if no value is specified	If no value is specified for a mandatory attribute, its default value is used. If the attribute has no default value, an error message is displayed in the import results output page.
Truncate if value is too long	If the value is longer than the maximum value for the attribute, the value is truncated before the requirement is saved.
Don't propagate suspect links	Links are not marked as suspect when the requirement is updated or replaced. NOTE: This option is not available for the Create mode.
Break lock if requirement is already locked	User locks are removed before attempting to update or replace the requirement. Otherwise, a message is displayed in the import results output page. NOTE 1: This option does not remove CM locks. NOTE 2: This option is not available for the Create mode.

Category Import Formats

For XML import, categories can be specified in these formats:

- Full path with forward slash, e.g. RMDemo/Data
- Full path with backslash, e.g. RMDemo\Data
- Unique category name, e.g. Data
Note that there must be no other category or sub-category "Data".

Date Import Formats

XML import requires that the date specified in a XML file matches the format for the attribute of the requirement class you wish to import.

Importing Requirements from a CSV File

You can import requirements text from CSV files. When you import from a CSV file, you can map fields (rows) in the CSV file to specific requirements and attributes in Dimensions RM. You can create new requirements, update existing requirements with new data, and delete or undelete existing requirements.



IMPORTANT! DO NOT modify the CSV file in Microsoft Excel or any other non-text editor! Doing so may alter the data in the file and cause CSV import to fail.

To import requirements and requirement data from a CSV file:

- 1 Select **CSV file** from the Import menu.
- 2 The CSV Import dialog opens.



CAUTION! When importing *Test Case* or *Test Run* requirements (as defined for "[Test Case Management](#)" on page 305), you **must** have an ID column in your CSV data which matches the attribute name for that class. If your CSV file does not have an ID column, all requirements will be merged into one requirement. For further information about importing *Test Case* or *Test Run* requirements, see chapter "[Importing Test Case and Test Run Requirements](#)" on page 298.

- 3 In the **File Name** field, enter or browse to select the path to the CSV file you want to import.
- 4 From the **Import Mode** list, choose one of the following import options:
 - **Create:** Create new requirements from the rows in the CSV file.
 - **Update:** Update attributes in existing requirements with new data from the CSV file. The attributes are updated in requirements that match the specified criteria.
 - **Replace:** Replace attributes in existing requirements with new data from the CSV file, creating a new current version of the requirement. The attributes are replaced in requirements that match the specified criteria.
 - **Delete:** Delete data in requirements that match the specified criteria.
 - **Undelete:** Restore deleted data in requirements that match the specified criteria.
 - **Remove:** Remove data in requirements that match the specified criteria.
 - **Link:** Create relationships between requirements that match the specified primary class criteria to requirements that match the specified secondary class criteria. In this way you can use the CSV import functionality just to create links in RM.



NOTE TEXT type attributes are not valid for Link mode so they will not be included in the attribute list when in Link mode.

- **Delete Link:** Deletes the selected link. Delete Link is available if the user has the *Link* right for classes and the *Delete* right for relationships.

- **Remove Link:** Permanently removes a link. Remove Link is available if the user has the *Link* right for classes and the *Remove* right for relationships.



CAUTION! You cannot restore a removed link.

- 5** From the **File Encoding** list, select the encoding used for the file. If the desired encoding is not available in the list, convert it to a supported format.
- 6** From the **Field Separator** list choose **Comma** or **Semi-colon**, depending on what separator is used in the CSV file.
- 7** To limit the range of rows to import, select **From** from the **Rows to Be Imported** option and enter the range. Otherwise, leave **All** selected to import data from all rows in the file. If the file has a header row, you can omit this by selecting the **File has header row** option.
- 8** From the **Log Level** list you can choose the level of detail in the summary report that displays after you start the import. Choose **Terse** or **Verbose**.
- 9** Under the **RM Mapping** heading, you must enter criteria to define how data from the CSV file will be imported to Dimensions RM. The mapping configuration differs

significantly depending on the import mode that you selected. Carefully review the following to understand how to use the RM Mapping options.

Import Mode	Mapping Guidelines
Create	<ul style="list-style-type: none"> ■ You must map columns from the CSV file to requirements attributes in RM. Data from the columns you select will be imported to the attributes you map the columns to, in the new requirements. ■ First select the requirements class from the RM Class field. Then, select the column from the CSV Column List field and the corresponding attribute from the RM Attribute list. Click the right arrow button to add the mapped pair to the Mapped List field.
Update	<ul style="list-style-type: none"> ■ You must first define criteria to locate the requirements to update, under Mapping Should Be Used to Locate Objects. You do this by matching values from columns in the CSV file to values from attributes in the requirements in RM. Every requirement with matching attribute values will be updated. First, select the requirement class from the RM Class field. Then, choose the CSV column to match from the CSV Column List field and the corresponding attribute from the RM Attribute list. Click the right arrow button to add the matched pair to the Mapped List field. ■ You must then define the attributes to update under Mapping to Be Used to Populate Data. Data from the CSV columns you select here will be imported to the attributes you map the columns to, in the requirements that are located by the criteria you defined under Mapping Should Be Used to Locate Objects. Select the column from the CSV Column List field and the corresponding attribute from the RM Attribute List field, then click the right arrow button to add the mapped pair to the Mapped List field. ■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the Ignore rows matching multiple objects option to do this. For example, if a Title value from the CSV column matches the value of the Title attribute from several requirements, then this CSV row and corresponding requirements will be ignored. ■ You can also optionally create new requirements if no requirements matching the criteria you specified are found, and populate the new requirements with the data mapping defined under Mapping to Be Used to Populate Data.
Replace	See the above information on Update.

Import Mode	Mapping Guidelines
Delete	<ul style="list-style-type: none"> <li data-bbox="738 205 1453 464">■ You must define criteria to identify the attributes from which data will be deleted. Do this by matching columns from the CSV file to attributes in the RM requirements. First choose the requirements class from the RM Class field. Then, select the CSV column from the CSV Column List field and the corresponding RM attribute from the RM Attribute List field. Click the right arrow to add the mapped pair to the Mapped List field. Any attributes with values that match the value of the corresponding CSV column will be deleted. <li data-bbox="738 485 1453 686">■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the Ignore rows matching multiple objects option to do this. For example, if a Title value from the CSV column matches the value of the Title attribute from several requirements, then this CSV row and corresponding requirements will be ignored.
Undelete	<ul style="list-style-type: none"> <li data-bbox="738 707 1453 966">■ You must define criteria to identify the attributes from which data will be undeleted. Do this by matching columns from the CSV file to attributes in the RM requirements. First choose the requirements class from the RM Class field. Then, select the CSV column from the CSV Column List field and the corresponding RM attribute from the RM Attribute List field. Click the right arrow to add the mapped pair to the Mapped List field. Any attributes with values that match the value of the corresponding CSV column will be undeleted. <li data-bbox="738 987 1453 1188">■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the Ignore rows matching multiple objects option to do this. For example, if a Title value from the CSV column matches the value of the Title attribute from several requirements, then this CSV row and corresponding requirements will be ignored.
Remove	<ul style="list-style-type: none"> <li data-bbox="738 1203 1453 1461">■ You must define criteria to identify the attributes from which data will be removed. Do this by matching columns from the CSV file to attributes in the RM requirements. First choose the requirements class from the RM Class field. Then, select the CSV column from the CSV Column List field and the corresponding RM attribute from the RM Attribute List field. Click the right arrow to add the mapped pair to the Mapped List field. Any attributes with values that match the value of the corresponding CSV column will be removed. <li data-bbox="738 1482 1453 1684">■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the Ignore rows matching multiple objects option to do this. For example, if a Title value from the CSV column matches the value of the Title attribute from several requirements, then this CSV row and corresponding requirements will be ignored.

Import Mode	Mapping Guidelines
Link	<ul style="list-style-type: none"> ■ You must define criteria to locate the requirements to link. You must locate two requirements, a primary class and secondary class requirement. The resulting relationship is created between the primary and secondary requirement. ■ First choose the type of relationship from the RM Relation field. ■ To define the criteria for the first requirement, match columns from the CSV Column List field under Primary Class to attributes in the RM Attribute List field. Select the values and click the right arrow button to add the mapped pair to the Mapped List field. ■ To define the criteria for the second requirement, match columns from the CSV Column List field under Secondary Class to attributes in the RM Attribute List field. Select the values and click the right arrow button to add the mapped pair to the Mapped List field. ■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the Ignore rows matching multiple objects option to do this. For example, if a Title value from the CSV column matches the value of the Title attribute from several requirements, then this CSV row and corresponding requirements will be ignored.
Unlink	<ul style="list-style-type: none"> ■ You must define criteria to locate the requirements to unlink. You must locate two requirements, a primary class and secondary class requirement. The relationship is removed between the primary and secondary requirement. ■ First choose the type of relationship from the RM Relation field. ■ To define the criteria for the first requirement, match columns from the CSV Column List field under Primary Class to attributes in the RM Attribute List field. Select the values and click the right arrow button to add the mapped pair to the Mapped List field. ■ To define the criteria for the second requirement, match columns from the CSV Column List field under Secondary Class to attributes in the RM Attribute List field. Select the values and click the right arrow button to add the mapped pair to the Mapped List field. ■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the Ignore rows matching multiple objects option to do this. For example, if a Title value from the CSV column matches the value of the Title attribute from several requirements, then this CSV row and corresponding requirements will be ignored.

10 When you are done defining the mappings, click the **Import** button.

Category Import Formats

For CSV import, categories can be specified in these formats:

- Full path with forward slash, e.g. RMDemo/Data
- Full path with backslash, e.g. RMDemo\Data
- Unique category name, e.g. Data
Note that there must be no other category or sub-category "Data".
- Category ID, e.g. 21

Date Import Formats

CSV import requires that the date specified in a CSV file matches the format for the attribute of the requirement class you wish to import.

Importing Test Case and Test Run Requirements

Test Case or *Test Run* requirements (as defined for "[Test Case Management](#)" on page 305) are imported through CSV import (see chapter "[Importing Requirements from a CSV File](#)" on page 293). However, note the following:

- 1 Import expects that for Create, Update or Replace, there is always an ID (*PUID* or *OBJECT_ID*) present.
PUID: Must match the display name of the PUID attribute of the class.
OBJECT_ID: Must have the name *OBJECT_ID*.
- 2 For Create, the ID may be an existing ID or an imaginary ID.
- 3 The ID (*PUID* or *OBJECT_ID*) must be only on the line the requirement starts.
- 4 The first line of the CSV file must have field names.
- 5 The "Test Steps" attribute is split into columns with these names:
 - Test Steps - Description
 - Test Steps - Expected Result
 - Test Steps - Actual Result



CAUTION! Only specify this column for *Test Run* requirements.

- 6 The step number (e.g. "Step 3") is generated from the position within the CSV file.

Example

```

Test ID,Test Name,Test Steps - Description,Test Steps - Expected Result
TC_0001,Login RM,Click Login,Opens the Home View
,,Click Requirements,Opens Requirements View
TC_0002,Open Test Requirement,Enter 'Test' and click 'Search',Shows 10 requirements
,,Double-click requirement from search result,Opens 'Edit Attributes' dialog for the requirement

```

The above example represents 2 *Test Case* requirements, TC_0001 and TC_0002. Note that the "Test Steps" attribute has been split and Step 2 (Description and Expected Result) is on a separate line without any other field values.

Importing Requirements from a ReqIF File

A ReqIF file allows exchanging requirements between applications of different vendors. The following chapters describe how to import requirements and documents from a ReqIF file to Dimensions RM.

Importing Requirements from IBM Rational DOORS

In order to import requirements from DOORS, the data from DOORS need to be exported into a file in ReqIF format. Then, the ReqIF file is imported by RM Browser.

Prerequisites

- 1 Export your module or modules from DOORS into a single ReqIF file. For more information about the DOORS ReqIF export see the DOORS manual.
- 2 If your DOORS module contains pictures or other attachments, these are exported by DOORS into the same directory as the ReqIF file. Put these files together with the ReqIF file into a single ZIP file. This ZIP file can then be imported by RM Browser.



IMPORTANT! The import class in Dimensions RM needs to have attributes to store these attributes:

- **DOORS ID** (Type: Alphanumeric)
- **ReqIF ID** (Type: Alphanumeric)
- **Owner** (Type: Alphanumeric)
- **File attachment** (Type: File Attachment)

Depending on the attribute names, the attributes are mapped automatically. For further information on attribute names for ReqIF import, see chapter "Class Definition for ReqIF" in the *Dimensions RM Administrator's Guide*.

Starting the Import

To start the import:

- 1 Click **ReqIF** from the **Import** menu. The **Import ReqIF** wizard opens.

- 2 Select **Import DOORS Modules** and click on the **OK** button. This opens the first page of the *Import ReqIF* wizard.
- 3 Press the **Browse...** button and choose the ZIP file that contains your ReqIF file.
- 4 **RM Class:** Select the class to convert the requirements to. Every requirement object in your ReqIF file will be converted and imported into this RM Class type.
- 5 **DOORS ID:** Select the attribute which holds the DOORS ID of your requirements. This is necessary to transfer your module correctly to Dimensions RM and create the links between your requirements.
- 6 **ReqIF ID:** Select an attribute that will hold the ReqIF ID of your requirements. This is necessary to transfer your module correctly to Dimensions RM and create the links between your requirements.
- 7 **Attachment Field:** Select an attribute that will hold the attachments of your requirements such as images or other files.
- 8 **Owner Field:** Select an attribute that will hold the name of the owner module of your requirements. This is necessary to build your module correctly in Dimensions RM.
- 9 **Table As:** If your module contains DOORS tables, they can be imported either as HTML table or as single requirements.
 - **HTML:** Creates an HTML table and saves in a text attribute. The conversion to HTML will drop any attributes which are not visible. To keep these attributes choose **Requirement**.
 - **Requirement:** Saves every cell of your table as single requirement.
- 10 **Module Structure:** You can import a document (module) with or without chapters.
 - **Create Chapters:** The resulting RM document will contain chapters which contain either sub-chapters or requirements.
 - **Create Requirements Only:** The resulting RM document will contain only requirements. That means that the document structure is built with requirements instead of chapters.
- 11 **Import Mode:** Specifies how import should operate on requirements that exist in Dimensions RM.
 - **Create Requirements:** Always creates the requirement during import.
 - **Replace Requirements:** Replaces existing requirements during import.
 - **Create new requirement if requirement is not found:** This option is only available if **Replace Requirements** has been selected.
 - **Enabled:** A requirement it is created if it cannot be found.
 - **Disabled:** A requirement which cannot be found is not imported.
- 12 **ReqIF Document(s) / Selected Document(s):** Here, you can define which documents (modules) you want to import.

Adding a document (module) for Import:

- a Select the documents (modules) you want to import in the list **ReqIF Document(s)**.



NOTE If a document has one or several baselines, you find these baselines in the list as separate document entries. Adding these entries to the list **Selected Document(s)** adds these baselines as snapshots of the parent document.

- b Click the  button. This adds the document to the list **Selected Document(s)**.

Renaming a Selected Document:

- a Select the documents (modules) you want to import in the list **Selected Document(s)**.
- b Click on the **Rename** link. This adds the document to the list **Selected Document(s)**. This opens the *Rename document* dialog.
- c Enter the new name into the textbox.
- d Click on the **OK** button.

Removing a document (module) from Import:

- a Select the documents (modules) you want to remove in the list **Selected Document(s)**
- b Click the  button.

13 Click **Next**. This opens the *RM Attribute Mapping* page. Here, you can map ReqIF attributes to RM attributes.

14 **RM Attribute Mapping:** An attribute mapping defines which Dimensions RM attribute receives the value of a ReqIF attribute.

Mapping an Attribute:

- a Select a ReqIF attribute in the list **ReqIF Attribute(s)**.
- b Select an RM attribute in the list **RM Attribute(s)**.
- c Click the  button. The mapping appears in the list **Mapped Attribute(s)**. Repeat these steps for further attributes you want to map.

Removing an Attribute Mapping:

- a Select the attribute you want to remove in the list **Mapped Attribute(s)**.
- b Click the  button.



IMPORTANT! Requirements in Dimensions RM have mandatory attributes (e.g. *Title* and *Text*). Depending on the class, other attributes might be mandatory as well. If no mapping is defined for a mandatory attribute, it will receive the default value *not defined*.

15 **RM Attribute Value Mapping:** A value mapping defines how to convert a value of multi value attribute (e.g. list attribute).

Mapping a Value:

- a Select a ReqIF value in the list **ReqIF Value(s)**.
- b Select an RM value in the list **RM Value(s)**.
- c Click the ➔ button. The mapping appears in the list **Mapped Value(s)**. Repeat these steps for further values you want to map.

Removing a Value Mapping:

- a Select the value you want to remove in the list **Mapped Value(s)**.
- b Click the ⬅ button

**NOTE**

- If a value for a mandatory attribute is not mapped, it will receive the default value *not defined*.
- If a value for an optional attribute is not mapped, it will remain empty.

- 16 Click **Import** to start the import.

Importing Baselines from IBM Rational DOORS

In order to import baselines, you need to have documents in Dimensions RM which originate from DOORS. The import will update a single Dimensions RM document only. If you do not have imported any DOORS documents (modules), first perform the import as described in chapter "[Importing Requirements from IBM Rational DOORS](#)" on page 299.

Prerequisites

- 1 Export your module or modules from DOORS into a single ReqIF file. For more information about the DOORS ReqIF export see the DOORS manual.
- 2 If your DOORS module contains pictures or other attachments, these are exported by DOORS into the same directory as the ReqIF file. Put these files together with the ReqIF file into a single ZIP file. This ZIP file can then be imported by RM Browser.



IMPORTANT! The import class in Dimensions RM needs to have attributes to store these attributes:

- **DOORS ID** (Type: Alphanumeric)
- **ReqIF ID** (Type: Alphanumeric)
- **Owner** (Type: Alphanumeric)
- **File attachment** (Type: File Attachment)

For all alphanumeric attributes, the length needs to be defined according to the longest value.

Starting the Import

To start the import:

- 1 Click **ReqIF** from the **Import** menu. The **Import ReqIF** wizard opens.

- 2 Select **Import DOORS Baselines** and click on the **OK** button. This opens the first page of the *Import ReqIF* wizard.
- 3 **RM Document:** Select the RM document you want to update. Please note that completing the process will replace the content of the selected document.
- 4 Continue with [Step 3 on page 300](#).

Importing Previously Exported Requirements

For importing previously exported requirements, there are two options:

- 1 Importing a document created by **Export As** function of Quick Search
- 2 Importing a Word document created by **Publish** function of a RM document



IMPORTANT! You can import any of these file formats:

- Word documents
- XML files
- CSV files



CAUTION! When importing user attributes, the setting must be **Show User ID**. For further information see chapter "[Display Settings for User Attributes](#)" on page 77.

In general, importing requirements which have been previously exported works as described in the chapters above. However, when using Word documents, the requirements need to be imported from tables. For each format, the document needs to be prepared for import by executing the following steps:

- 1 For Word documents: Ensure that all mandatory fields are included and contain values. If not, add a column with the missing attribute name and fill each cell with values.
- 2 For Word documents:
 - a Ensure that the attribute names of the class match the column headers of the document
 - b Remove all fields which cannot be filled (e.g. creation date). Remove the ID column only when creating new requirements.
 - c Remove the **Row Count** row.
- 3 For XML files:
 - a Remove all fields which cannot be filled (e.g. creation date). Remove the ID column only when creating new requirements.
 - b Remove requirement attributes **id**, **version** and **puid** and the **attribute** element with the **id** value **PUID**.
- 4 For CSV files: Remove the **Row Count** row.
- 5 Save the document under a new name.

- 6 Start the import as described in:
 - ["Importing Requirements from Microsoft Word Documents"](#) on page 284
 - ["Importing Requirements from an XML File"](#) on page 291
 - ["Importing Requirements from a CSV File"](#) on page 293

Chapter 9

Test Case Management

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Overview

Test Case Management allows creation of test cases and one or several test runs which are related to one test case. A test case defines the overall goal of a test and the procedure. A test run shows the executed tasks along with the results. The following chapters describe the default installation of Test Case Management. Please note that the class names and form layouts are not necessarily identical with your installation.

Creating a Test Case

A test case allows users to define the overall goal of a test (e.g. Dimensions RM Client Installation) together with the test steps to be performed (e.g. execute Setup.exe).

To create a test case, follow these steps:

- 1 In the New menu, select **Requirement** and choose the test case class, e.g. **Test_Case**; this will open the test case form. If there are issues opening the form please check with the RM Administrator or see the "Test Case Management" chapter in the *Dimensions RM Administrator's Guide*.
- 2 In the **Standard Attributes** section, enter the test name and description (the overall goal of the test case).
- 3 Expand the **Test Design** section of the form.
- 4 Populate the attributes on this section of the form, leaving the **Test Steps** for last.
- 5 Below is an example of the test steps section, as defined by the default form. Click **+ Add** to create a new step.

Test Steps:

Step	Description	Expected Result

- 6 Double-click the cell in the **Description** column to add or edit the description.
- 7 Double-click the cell in the **Expected Result** column to edit the expected result.
- 8 Repeat steps 5 through 7 to add additional steps.
- 9 The **Last Test Execution** will default to 'No Run', leave that for later.
- 10 When complete, click **Save**, or **Save & Copy** or **Save & New**.

Creating a Test Run

A test run is related to a test case and allows the tester to provide the results of the executed tests.

To create a test run, follow these steps:

- 1 Open the test case of which you want to create a test run. For details on opening requirements, see chapter ["Exporting Requirements" on page 98](#).
- 2 In the **Edit Attributes** dialog, expand the **Links** section.
- 3 Click .
- 4 If using the default setup, this opens a **New Test_Run** dialog, pre-populated with the description, pre-requisites and the test steps. A new column is added for the tester to enter the actual result.
- 5 Enter a name for the test run.
- 6 Expand the sections titled **Test Planning** and **Test Execution** and populate the attributes. These attributes are typically used for scheduling and assignment. A tester can easily filter test steps assigned to them, and add notes and status.
- 7 Click **Save**.

Mass Creating Test Runs

If you have many test cases, Test Run creation can be simplified through Mass Creations using the Create New & Link function. For further information, see chapter ["Mass Creating Requirements" on page 111](#).

Test Step Functions

The **Test Steps** table contains a list of all test steps. It contains these columns:

- **Unnamed column:** Contains a check box for remove and move (up/down) operations.
- **Step:** Contains the step name, e.g. Step 1.
- **Description:** Empty by default. Enter the instructions to the tester.
- **Expected Result:** Empty by default. Specify under which conditions the step is considered successful.
- **Result:** This column only exists in the *Test_Run* class. The tester enters the actual result of the test step.

The Test Steps table provides these functions:

	Creates a new step in the Test Steps table.
	Removes one or several selected test steps.
	Moves one selected step one position up.

 Down	Moves one selected step one position down.
	Expands the Test Steps table to fill the window.
 Save	Only available in expanded Test Steps mode. Transfers your changes to the New Test_Cases window.
 Cancel	Only available in expanded Test Steps mode. Cancels your changes and returns to the New Test_Cases window.

Chapter 10

Agile

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Before you start

Before you can start using Agile with Dimensions RM, the following tasks must be executed:

- 1 Create classes and relationships (see chapter "Agile" in *Dimensions RM Administrator's Guide*).
- 2 Enable Agile for the instance (see chapter "Agile" on page 76).
- 3 Configure Agile (see chapter "Configuring Agile" on page 377).

Agile Basics

About Agile

Dimensions RM provides agile capabilities like backlogs, story boards and burndowns. Agile as well as traditional artifacts can be visualized within these views and even linked together to support hybrid approaches at organization and project level. Agile can only be enabled by a user with Administrator rights. To enable Agile, see chapter "Agile" on page 76.

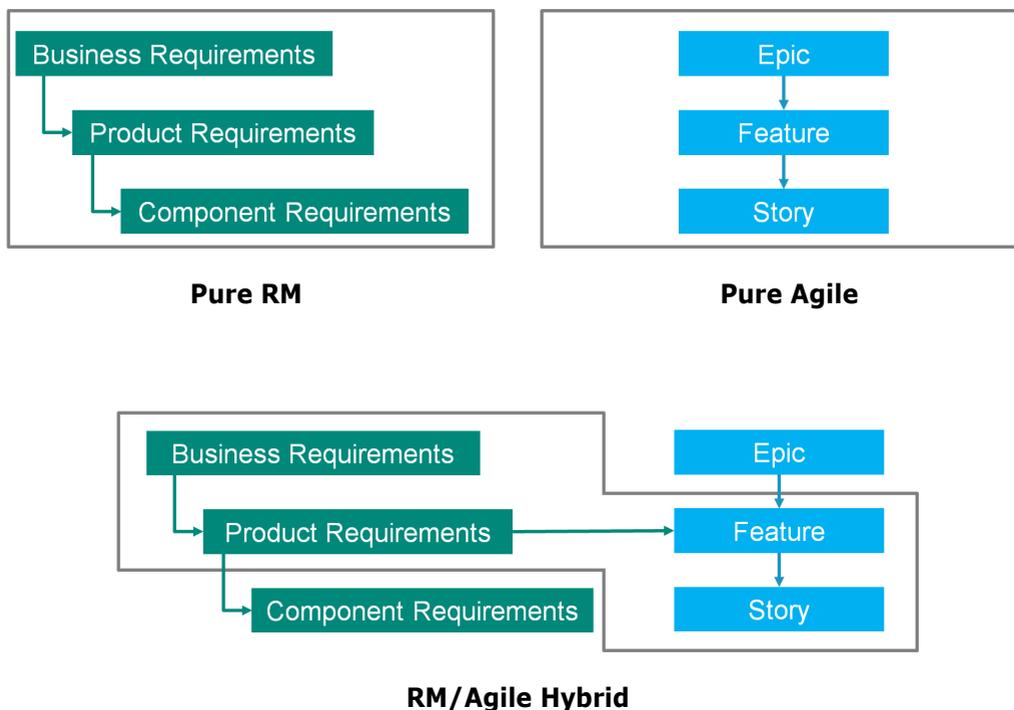
Agile Features

Agile in Dimensions RM allows:

- **Agile artifacts and agile views**
 - Agile artifacts based on RM classes
 - Backlogs and Story Boards
 - Product/Release/Sprint breakdown
 - Calculations and visualizations on priority, effort, and progress
 - Burndown reports on Release and Sprint level
- **Support of hybrid approaches**
 - Requirements and agile artifacts
 - Traceability throughout all artifact types
 - Non-functional requirements
 - Re-use of Backlog and Story Boards for traditional artifacts
- **Integration into development**
 - Story to be provided to (agile) development tool
 - Feedback on development progress back to RM boards

Comparing Requirements Management and Agile Approaches

The following images compare the different approaches or requirement management.



- **Pure RM:** The pure RM approach allows to define the different requirement types, but does not allow the development department to break down requirements into individual tasks.
- **Pure Agile:** The pure Agile approach allows the development to maintain different tasks and changes between different releases, but does not connect these tasks with the requirement.
- **RM/Agile Hybrid:** The RM/Agile hybrid approach combines the best of both worlds. The different requirement types are connected with the tasks and changes of the development department.

Accessing Agile

To access Agile, click the **Agile** icon  in the menu bar. This opens the Agile view. On the right hand side, underneath the menu bar, you find these controls:

- **Product** drop-down list 
- Edit button 
- Display Options menu 
- **New** menu

Then, select a product (to add a product, see chapter ["Adding Products" on page 324](#)). This opens the following tabs for the selected product:

- [Overview Tab](#)
- [Product Backlog Tab](#)
- [Product Storyboard Tab](#)
- [Sprint Planning Tab](#)
- [Sprint Storyboard Tab](#)
- [Taskboard Tab](#)

About Products

A "Product" is an item to which you can assign epics, features or stories. This represents a complete product, a module or a component.

About Releases

A "Release" is linked to one product. Each release contains the epics, features, stories and sprints, which are relevant for the version. As an example, release 1.1 contains only those features, which have changed since release 1.0. A feature of such a release would also just contain those stories, which have changed since release 1.0. A release is marked .

About Stories

A "Story" describes the function to be implemented. However, a story may include several tasks. If a story were "Install database", this would require several settings to be made during the installation process. These settings could be specified within the story's description. However, a story should not be something like "Install operation system and database". This should be split into two stories.

In lists, stories may show the badges described in chapter ["About Badges" on page 313](#). A story is marked .



TIP You can easily change the priority of a story by using drag & drop.

- 1 Drag the story for which you want to change the priority to a story which has the priority you want, e.g. story ST_1 with priority "Low" to story ST_2 with priority "High".
- 2 Release the mouse button to drop story ST_1 on ST_2. This changes the priority of story ST_1 from "Low" to "High".

About Sprints

A "Sprint" defines in which time frame the assigned stories should be completed. A sprint is marked .

About Features

A "Feature" groups several stories logically together and will be assigned to a release. The description describes what the assigned stories should accomplish. In lists, features may show the badges described in chapter ["About Badges" on page 313](#).

A feature is marked .

About Epics

An "Epic" groups several features and stories logically together and will be assigned to a release. In lists, epics may show the badges described in chapter ["About Badges" on page 313](#). An epic is marked .



NOTE If you add the Epics class after products have been created, do the following for each product you want to use Epics with:

- 1 Select the product in the **Product** drop-down list .
- 2 Click the edit button .
- 3 Ensure that **Epic** is enabled in the **Shown mapped classes** area.
- 4 Click **Replace**.

About Tasks

Tasks allow you to split stories into different development steps. This gives you a more detailed overview about the progress on feature development. A task is marked .

About Mapped Classes

For epics, features, stories, and tasks, you can use more than one class. This allows to use different attribute sets, for different product types, e.g. a vehicle may need other attributes than a software. When creating or modifying a product, you find these mapped classes in the **Shown mapped classes** section of the dialog to create or modify a product. The **Shown mapped classes** section allows you to choose which classes you want to view on the Agile tabs. Note that you can only choose between several classes, if your administrator created them and configured them as described in chapter ["Configuring Agile" on page 377](#).

About Badges

In lists, epics, features, and stories provide additional information by using these badges:

- User or group, e.g. 
- Priority, e.g. 

In addition, stories have the following badges:

- Effort, e.g.  (format: remaining effort/estimated effort)
- Ranking, e.g. 

About Capacity

For a release or sprint, you can specify the **Capacity**. This numeric value specifies how long the release or sprint needs to be completed.

On the **Overview** tab, you see a progress bar for each release or sprint if the capacity has been specified.

On the **Product Backlog** tab, you see a progress bar next to the selected release. It shows how much of the capacity is used by all assigned features based on their estimated effort.

On the **Sprint Planning** tab, you see a progress bar next to the selected sprint. It shows how much of the capacity is used by all assigned stories based on their estimated effort.

About Story Maps

A Story Map allows you to assign epics, features, and stories to a release. This is especially helpful if features are implemented in phases (e.g. the basic functionality is implemented in release 1.0, while extended functionality is implemented in release 1.1). The following image shows the general setup of a story map:



Tool Tips

For getting a quick info about products, releases, sprints, epics, features, or stories, you can use the tool tip functionality in Agile. This tool tip shows all relevant information for the related class. It is available in lists or drop-down lists which show these icons:

-  Shows the tool tip for a product.
-  Shows the tool tip for a release.
-  Shows the tool tip for a sprint.

- Shows the tool tip for an epic.
- Shows the tool tip for a feature.
- Shows the tool tip for story.

Tool tips are also available for items which are referenced in another item, e.g. an epic or feature referenced in a story.

Display Options

Next to the Product drop-down list, you find the Display Options menu . It provides these settings:

Setting	Description
Filter by Categories	Shows epics, features, and stories only for the selected category.
Show my stories only	Shows only the stories, which are assigned to the current user.
Description	All: Shows the full description of stories, features, epics, sprints, and releases underneath their titles. Stories: Shows the full description of a story underneath its title. Hide: Hides the description of of stories, features, epics, sprints, and releases.
Parent Info	Shows the information of parents (epics and features) on the card.
Assigned features/stories	Gray: Shows those features and stories which are assigned to a release, with a gray background. Hide: Hides those features and stories which are assigned to a release.
Release progress	Show: The progress is shown by changing the background of an item into a progress bar. Hide: No progress is shown.
Sprint progress	Show: The progress is shown by changing the background of an item into a progress bar. Hide: No progress is shown.
Story progress	Show: The progress is shown by changing the background of an item into a progress bar. Hide: No progress is shown.
Show Empty Artifacts	Shows features and stories which have not been assigned to an epic.
Show Release Backlog	Shows stories that have not assigned to releases and sprints on the Story Map .
Show "Assigned To" badge	Shows the badge of the user or group to which a story is assigned.
Show "Effort" badge	Shows the effort badge of a story.

Setting	Description
Show "Priority" badge	Shows the priority badge of a story.
Show "Ranking" badge	Shows the ranking badge of a story.
Show on Card	Shows the selected story attribute on its card.

Showing or Hiding Attributes in Dialogs

For any dialog used to create, show, or edit a product, release, sprint, epic, feature, or story, you can show or hide any of the default Agile attributes. To show or hide an attribute, select it from the **Customize Fields** drop-down list. Displayed attributes show a check mark. An asterisk following the attribute name shows that the attribute is mandatory.

Showing Additional Story Attributes on Cards

For allowing a better overview on important data, you can show additional attributes on Story cards. Recognizing the needs of the different stages, each Agile tab is configured independently.

To show additional Story attributes:

- 1 Open the **Show on Card** drop-down.
- 2 Select the attributes you want to show on Story cards.



NOTE You can also show tool tips for the epics and features if they are shown in the story cards. For further information about tool tips, see chapter "[Tool Tips](#)" on page 314.

Agile Tabs

Overview Tab

The Overview tab displays relevant items in hierarchical lists and allows easy filtering. By using the Overview, you can easily find out which sprints are related to which feature and product.

The Overview tab is divided into these sections:

- [Burndown Diagram](#)
- [Release List](#)
- [Sprint List](#)
- [Stories List](#)

Burndown Diagram

The Burndown diagram is shown if you select a release or sprint.

Release Burndown Diagram: Shows the remaining effort and estimated effort for the related sprints.

Sprint Burndown Diagram: Shows the remaining effort and estimated effort for the related stories.

Both diagrams allow you to easily recognize if the deadline can be met.

Based on the previous values, the burndown diagram forecasts the future development. For easy recognition, the forecasted values are shown in a different color.

You can choose between these different diagram types:

- Line chart
- Area chart
- Bar chart
- Column chart

Release List

The release list shows all releases for the selected product. If the capacity has been specified, a progress bar is shown for each release. Selecting a release loads the burndown diagram and the sprint list.

Sprint List

The sprint list shows all sprints for the selected release. If the capacity has been specified, a progress bar is shown for each sprint. Selecting a sprint loads the assigned stories and the Burndown diagram.

Stories List

The stories list shows all stories for the selected sprint or release. If no sprint is selected, click **Load Stories** to load the stories for the selected release.

Product Backlog Tab

On the **Product Backlog** tab, you can do the following:

- Define features, stories or other artefacts for one product
- Group stories
- Prioritize
- Define acceptance criteria
- Scope items to one or more product releases

The **Product Backlog** tab is divided into these sections:

- **Product Backlog:** Shows features and stories, which are not assigned to any release.
- **Release:** Shows epics, features and stories, which are assigned to the selected release.

Depending on the **Assigned features/stories** setting in the Display Options menu (see ["Display Options" on page 315](#)), you may also see assigned features or stories in the **Product Backlog** list.

Assigning and Un-Assigning Features or Epics

To assign a feature or epic to a release, drag it from the **Product Backlog** list to the **Release** list and drop it there. After assigning a feature or epic to a release, the related stories are assigned to the selected release and become available in the **Product Storyboard**.

Alternatively, you can assign a feature or epic to a release by executing these steps:

- 1 Double-click the feature or epic you want to assign. This opens the edit dialog for that feature or epic.
- 2 In the **Release** box, select the desired release.
- 3 Click **Replace**.

To un-assign a feature or epic, drag it from the **Release** list to the **Product Backlog list** and drop it there. This un-assigns the stories from the selected release.

Alternatively, you can un-assign a feature or epic from release by executing these steps:

- 1 Double-click the feature or epic you want to un-assign. This opens the edit dialog for that feature or epic.
- 2 Click  next to the **Release** box.
- 3 Click **Replace**.

Assigning Stories

To assign a story to a release, drag it from the **Product Backlog** list or from a feature in the **Product Backlog** list and drop it on the **Release** list or on a feature in the **Release** list.

Alternatively, you can assign a story to a release by executing these steps:

- 1 Double-click the story you want to assign. This opens the edit dialog for that story.
- 2 In the **Release** box, select the desired release.
- 3 If desired, select the feature in the **Feature** box.
- 4 Click **Replace**.

Un-Assigning Stories

To un-assign a story from a release, drag it from the **Release** list or from a feature in the **Release** list and drop it on the **Product Backlog** list or on a feature in the **Product Backlog** list.

Alternatively, you can un-assign a story from release by executing these steps:

- 1 Double-click the story you want to un-assign. This opens the edit dialog for that story.
- 2 Click  next to the **Release** box.
- 3 If desired, select a feature from the Feature box or click  next to the Feature box to un-assign the feature.
- 4 Click **Replace**.

Story Map Tab

On the **Story Map** tab, you can do the following:

- Show progress for Epics, Features, Sprints, and Releases
- Show the total planned effort for Epics and Features
- Show capacity and dates for Sprints and Releases



NOTE The Story Map is best used with a small number of items. Thus, these are the maximum number of items allowed:

- **Epics:** 20
- **Sprints:** 20
- **Stories:** 200

If the number of epics, sprints, or stories exceeds above limits, use filters to limit their numbers (see chapter "[Filters](#)" on page 331). Alternatively, you might could display the items on other tabs or move the items (e.g. into a new release).

Product Backlog

The **Product Backlog** can be shown by clicking , which is located at the right side window border. The Product Backlog provides the following functions:

- | | |
|---|---|
|  Select multiple items | Shows or hides check boxes, which allow you to select multiple items. |
|  Select/un-select all items | Selects all items. |
|  Create new item | Creates a new Story. |

Product Storyboard Tab

On the **Product Storyboard** tab, you can do the following:

- Elaborate Stories

- Move stories through analysis stages
- Estimate effort
- Review
- Approve for sprint readiness

The **Product Storyboard** tab is divided into these sections:

- **Elaborated:** Contains stories which have been assigned to a release, but have not been planned for sprint assignment or assigned to a sprint.
- **Pre-Planning:** An optional intermediate step which contains all stories you want to assign to a sprint (in the future).
- **Sprint-Ready:** Contains stories which can be assigned to a sprint.

To change the planning status of a story, you can drag it to the desired state and drop it there.

Alternatively, you can change the planning status by executing these steps:

- 1 Double-click the story for which you want to change the Planning Status. This opens the edit dialog for that story.
- 2 In the **Planning Status** box, select the desired state.
- 3 Click **Replace**.

Sprint Planning Tab

On the **Sprint Planning** tab, you can do the following:

- Scope stories into sprints
- Prioritize
- Assign stories

The **Sprint Planning** tab is divided into these section:

Release Backlog: Contains stories which have not been assigned to a sprint.

Sprint: Contains stories which have been assigned to the selected sprint.

By default, the Sprint Planning tab shows all sprints. To show the stories assigned to a sprint, click  next to the sprint name.

To show only one sprint, select a sprint from the **Sprint** box. If you want to show all sprints again, click **Show all**.

Sprint Capacity

If one sprint is selected in the **Sprint** box, the **Capacity** progress bar is located next to it. If all sprints are shown, the capacity progress bar is shown for each sprint individually.

For more information about the capacity progress bar see chapter ["About Capacity" on page 314](#).

Assigning Stories to Sprints

To assign a story to the selected sprint, drag it from the **Release Backlog** list to the **Sprint** list and drop it there. If you show all sprints, drop it onto the desired sprint in the **Sprint** list.

Alternatively, you can assign a story to a sprint by executing these steps:

- 1 Double-click the story you want to assign or un-assign. This opens the edit dialog for that story.
- 2 In the **Sprint** box, select the desired sprint.
- 3 Click **Replace**.

To **un-assign a story**, drag it from the **Sprint** list to the **Release Backlog** list and drop it there.

Alternatively, you can un-assign a story from sprint by executing these steps:

- 1 Double-click the story you want to un-assign. This opens the edit dialog for that story.
- 2 Click  next to the **Sprint** box.
- 3 Click **Replace**.

Sprint Storyboard Tab

On the **Sprint Storyboard** tab, you can do the following:

- Move stories through lifecycle stages
- Re-assign stories
- Can also be used for requirements analysis sprints

The **Sprint Storyboard** tab is divided into these sections:

- **Not Started:** Contains stories on which implementation has not yet started.
- **In Development:** Contains stories which are currently in development.
- **In Test:** Contains stories which have been developed and are now being tested.
- **In Review:** Contains stories which have been developed and are now under review.
- **Accepted:** Contains stories which have passed the review phase successfully.

To change the Sprint status of a story, you can drag it to the desired state and drop it there.

Alternatively, you can change the Sprint Status by executing these steps:

- 1 Double-click the story for which you want to change the Sprint Status. This opens the edit dialog for that story.
- 2 In the **Sprint Status** box, select the desired state.
- 3 Click **Replace**.

Taskboard Tab

On the **Taskboard** tab, you can manage tasks. To manage tasks, you must select a sprint first.

Creating a Task without Options



NOTE If you choose this method to create a task, the task will have the following data:

- **Task Name** as entered
- **Task Status** as selected by the column the task is created in
- **Priority** as specified by its the default value
- **Assigned To** with own user account if possible
- **Description** remains empty
- **Log** remains empty

To create a task, do following:

- 1 Hover your mouse pointer over a story.
- 2 Click **+** in the column with the desired sprint status.
- 3 Type the name of the task.
- 4 Click  to save the task.

Creating a Task with Options



NOTE If you choose this method to create a task, you can specify the values for each attribute of the task.

To create a task, do following:

- 1 Select a story.
- 2 From the **New** menu, select **Task**. This opens the **Tasks** dialog.
- 3 Specify the **Name**.
- 4 Specify the value for each other attribute as required or desired.

- 5 Click **Save**.

Editing a Task

To edit a task, do the following:

- 1 Double-click the desired task.
- 2 Modify attributes as desired.
- 3 Click **Replace**.

Changing the Task Status

To change the task status, you can either edit the task and modify the attribute there (see chapter "[Editing a Task](#)" on page 323), or move the task to the column showing the desired task status using drag and drop.



NOTE When using drag and drop to move the task and all other tasks for that story are in the final task status, you will be prompted to update the related stories. If you wish to modify those stories, change **Estimated Effort**, **Remaining Effort** and **Sprint Status** and click **Save**.

Deleting a Task

To delete a task, do the following:

- 1 Move the mouse pointer towards the middle of the desired task.
- 2 Move the mouse pointer straight down, stopping just under the task.
- 3 Click .
- 4 Confirm to delete the task.

Changing a Task Marker

- 1 Move the mouse pointer towards the middle of the desired task.
- 2 Move the mouse pointer straight down, stopping just under the task.
- 3 Click .
- 4 Select one of the pre-defined colors or click **Clear** to remove the marker.

Using Agile

Using Products

When adding or modifying a product the **Shown mapped classes** section allows you to do the following:

- Show or hide releases for a product on all Agile tabs.
- Show or hide sprints for a product on all Agile tabs.
- Select which classes you want to show or hide for epics, features, stories, and tasks for a product on all Agile tabs.

Adding Products

To add a product, execute these steps:

- 1 In Agile's **New** menu, select **Product**. This opens the *New Products* dialog.
- 2 Complete the fields of the dialog as needed.
- 3 If desired, specify which classes shall be visible on the Agile tabs by modifying the settings in the **Shown mapped classes** section. For more information about mapped classes, see chapter ["About Mapped Classes"](#) on page 313.
- 4 To specify the visible views, you can enable or disable and specify the tab headers on the following options:
 - **Overview**
 - **Product Backlog**
 - **Story Map**
 - **Product Storyboard**
 - **Sprint Planning**
 - **Sprint Storyboard**
 - **Taskboard**

By default, all above options are selected.

- 5 Click one of the following buttons:
 - **Save:** Saves the new product and closes the dialog.
 - **Save & New:** Saves the new product and opens a new empty *New Products* dialog to create a new product.

Editing Products

To edit a product, execute these steps:

- 1 In the **Product** drop-down , select the product you want to edit.
- 2 Click the Edit button  next to the Product drop-down. This opens the Products dialog.

- 3 Edit the product as desired.
- 4 If desired, specify which classes shall be visible on the Agile tabs by modifying the settings in the **Shown mapped classes** section. For more information about mapped classes, see chapter ["About Mapped Classes" on page 313](#).
- 5 Click **Replace**.

Deleting Products

To delete a product, execute these steps:

- 1 In the **Product** drop-down , select the product you want to delete.
- 2 Click the Edit button  next to the **Product** drop-down. This opens the Products dialog.
- 3 Click **Delete**.
- 4 Confirm the deletion dialog by clicking **OK**.

Manual Product Assignment

If you created a product through by selecting **Products** in the **New** menu of the menu bar, import or web service, several assignments are not made.

To use the product with Agile, do the following:

- 1 Identify the category, the product resides in, e.g. by searching the product with Quick Search (see chapter ["Finding Requirements with Quick Search" on page 92](#)).
- 2 Click the **Agile** icon  in the menu bar. This opens the Agile view.
- 3 Select the category you identified in step 1 from the list underneath the menu bar.
- 4 Select the product in the **Product** drop-down list .
- 5 Click the edit button .
- 6 If desired, specify which classes shall be visible on the Agile tabs by modifying the settings in the **Shown mapped classes** section. For more information about mapped classes, see chapter ["About Mapped Classes" on page 313](#). When using releases, tick the **Releases** box.
- 7 Select the tabs you want to display. To display a tab, tick the associated box. There are these tabs:
 - **Overview**
 - **Product Backlog**
 - **Story Map**
 - **Product Storyboard**
 - **Sprint Planning**
 - **Sprint Storyboard**
 - **Taskboard**
- 8 Click **Replace**.

Using Releases

Adding Releases

To add a release, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to add a release.
- 2 In Agile's **New** menu, select **Release**. This opens the *New Releases* dialog.
- 3 Complete the fields of the dialog as needed.
- 4 In the **Capacity** box, specify the maximum duration (e.g. days) in which the release must be completed.
- 5 Click one of the following buttons:
 - **Save:** Saves the new release and closes the dialog.
 - **Save & New:** Saves the new release and opens a new empty *New Releases* dialog to create a new release.

Editing Releases

Releases are available on several tabs and can be edited on any of those tabs. For simplification, the following steps describe the process only for the **Overview** tab.

To edit a release, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to edit a release.
- 2 Select the **Overview** tab.
- 3 Double-click the release you want to edit. This opens the Releases dialog.
- 4 Edit the release as desired.
- 5 Click **Replace**.

Deleting Releases

Releases are available on several tabs and can be deleted on any of those tabs. For simplification, the following steps describe the process only for the **Overview** tab.

To delete a release, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to delete a release.
- 2 Select the **Overview** tab.
- 3 Double-click the release you want to delete. This opens the Releases dialog.
- 4 Click **Delete**.
- 5 Confirm the deletion dialog by clicking **OK**.

Using Epics

Adding Epics

To add an epic, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to add an epic.
- 2 In Agile's **New** menu, select **Epic**. This opens the *New Epics* dialog.
- 3 Complete the fields of the dialog as needed.
- 4 Click one of the following buttons:
 - **Save:** Saves the new feature and closes the dialog.
 - **Save & New:** Saves the new feature and opens a new empty *New Epics* dialog to create a new epic.

Editing Epics

To edit an epic, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to edit an epic.
- 2 Select the **Product Backlog** tab.
- 3 If the epic is assigned to a release, select the release in the **Release** drop-down .
- 4 Double-click the epic you want to edit. This opens the Epics dialog.
- 5 Edit the epic as desired.
- 6 Click **Replace**.

Deleting Epics

To delete an epic, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to edit an epic.
- 2 Select the **Product Backlog** tab.
- 3 If the epic is assigned to a release, select the release in the **Release** drop-down .
- 4 Double-click the epic you want to delete. This opens the Epics dialog.
- 5 Click **Delete**.
- 6 Confirm the deletion dialog by clicking **OK**.

Using Features

Adding Features

To add a feature, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to add a feature.

- 2 In Agile's **New** menu, select **Feature**. This opens the *New Features* dialog.
- 3 Complete the fields of the dialog as needed.
- 4 Click one of the following buttons:
 - **Save:** Saves the new feature and closes the dialog.
 - **Save & New:** Saves the new feature and opens a new empty *New Features* dialog to create a new feature.

Editing Features

To edit a feature, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to edit a feature.
- 2 Select the **Product Backlog** tab.
- 3 Double-click the feature you want to edit. This opens the Features dialog.
- 4 Edit the feature as desired.
- 5 Click **Replace**.

Deleting Features

To delete a feature, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to delete a feature.
- 2 Select the **Product Backlog** tab.
- 3 Double-click the feature you want to delete. This opens the Features dialog.
- 4 Click **Delete**.
- 5 Confirm the deletion dialog by clicking **OK**.

Using Stories

Adding Stories

To add a story, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to add a story.
- 2 In Agile's **New** menu, select **Story**. This opens the *New Stories* dialog.
- 3 Complete the fields of the dialog as needed.
- 4 Click one of the following buttons:
 - **Save:** Saves the new story and closes the dialog.
 - **Save & New:** Saves the new story and opens a new empty *New Stories* dialog to create a new story.

Editing Stories

Stories are available on several tabs and can be edited on any of those tabs. For simplification, the following steps describe the process only for the **Overview** tab.

To edit a story, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to edit a story.
- 2 Select the **Overview** tab.
- 3 Select a release and a sprint.
- 4 Double-click the story you want to edit. This opens the Stories dialog.
- 5 Edit the story as desired.
- 6 Click **Replace**.

Deleting Stories

Stories are available on several tabs and can be deleted on any of those tabs. For simplification, the following steps describe the process only for the **Overview** tab.

To delete a story, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to delete a story.
- 2 Select the **Overview** tab.
- 3 Select a release and a sprint.
- 4 Double-click the story you want to delete. This opens the Stories dialog.
- 5 Click **Delete**.
- 6 Confirm the deletion dialog by clicking **OK**.

Using Sprints

Adding Sprints

To add a sprint, execute these steps:

- 1 In the **Product** drop-down , select the product for which you want to add a sprint.
- 2 In Agile's **New** menu, select **Sprint**. This opens the *New Sprints* dialog.
- 3 Complete the fields of the dialog as needed.
- 4 In the **Capacity** box, specify the maximum duration (e.g. days) in which the sprint must be completed.
- 5 Click one of the following buttons:
 - **Save:** Saves the new sprint and closes the dialog.
 - **Save & New:** Saves the new sprint and opens a new empty *New Sprints* dialog to create a new sprint.

Editing Sprints

Sprints are available on the **Overview** tab, **Sprint Planning** tab, and **Sprint Storyboard** tab. You can edit sprints on any of those tabs. For simplification, the following steps describe the process only for the **Overview** tab.

To edit a sprint, execute these steps:

- 1** In the **Product** drop-down , select the product for which you want to edit a sprint.
- 2** Select the **Overview** tab.
- 3** Select a release.
- 4** Double-click the sprint you want to edit. This opens the Sprints dialog.
- 5** Edit the story as desired.
- 6** Click **Replace**.

Deleting Sprints

Sprints are available on several tabs and can be deleted on any of those tabs. For simplification, the following steps describe the process only for the **Overview** tab.

To delete a sprint, execute these steps:

- 1** In the **Product** drop-down , select the product for which you want to edit a sprint.
- 2** Select the **Overview** tab.
- 3** Select a release.
- 4** Double-click the sprint you want to delete. This opens the Sprints dialog.
- 5** Click **Delete**.
- 6** Confirm the deletion dialog by clicking **OK**.

Using Teams with Agile

Teams in Agile allow you to assign releases, or sprints to a team. The team can then filter for releases, or sprints assigned to them. To use teams, the function must be enabled. For more details about teams, see chapter "[Managing Teams](#)" on page 338).

For all Agile classes supporting teams (releases, sprints, and stories), the assignment of teams is optional. This is the suggested workflow:

- 1** Assign one or several teams to a release.
- 2** Assign one or several teams to a sprint which is assigned to a release.
No teams assigned to the release: You can select from all teams.
Teams assigned to the release: You can select from those teams assigned to the release.

Viewing Linking History of an Item

For epics, features, releases, and sprints, you can view the linking history. To open the linking history, do the following:

- 1 Open an item that is linked with the history entry you want to check (e.g. a story).
- 2 Click the icon next to the drop-down box for which you wish to view the linking history.
 - Epic or feature shows the linking history for both, epics and feature.
 - Release or sprint shows the linking history for both, release and sprint.
- 3 Hover a link of an entry to show a tooltip with additional information of the linked item.

Filters

The Agile tabs allow several options for filtering. Please note that not all options are available on all tabs.

To filter the Story Map, select one or several of these drop-downs:

- Options  list:
 - **Filter by Categories:** Shows epics, features, and stories only for the selected category.
 - **Show my stories only:** Shows only the stories, which are assigned to the current user.
- Items  list: Filters stories according to the following options:
 - **Priority:** Select the priority or priorities to you wish to filter.
 - **Assigned To:** Select the owners you wish to filter. Clicking **Me** sets the filter to your user account. Clicking  opens the **Find & Select User** dialog, which allows you to find a user. For further details, see chapter "[Find & Select Dialog](#)" on page 42.
 - **Color:** Select one or several colors you wish to filter.
 - **Epic:** Select one or several epics for which you want to display the related stories.
 - **Feature:** Select one or several features for which you want to display the related stories.
- **Filter items...** input box: Filters all displayed items for the text entered into the box.
- Product  list: Select the product for which you want to display related items.
- Release  list: Select one or several releases for which you want to display related items.
- Sprint  list: Select one or several sprints for which you want to display related items.
- Feature  list: Select one or several features for which you want to display related items.

- Column : Select a column filter to only display the column with its stories. This filter is only available on the **Product Storyboard** tab.

Sorting

You can sort items for the following properties:

- Assigned To
- Name
- Priority
- Ranking

You can toggle the sorting order by clicking the icon next to the Sort box.

-  Sorts entries ascending
-  Sorts entries descending

Chapter 11

Administration

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About Administration

Usually, only users who are members of the Administrators group can use the functions in the Administration menu. If required, users or groups can become administrators to certain categories. For further information, see chapter "Creating Category Administrators" in the *Dimensions RM Administrator's Guide*.

Managing Users

The following sections describe how to add, edit or delete users in RM Browser. Only users who belong to the Administrators group can open the **User Management** dialog. The **User Management** dialog consists of these columns:

- User list
- User details

Creating a New User

To create a new user:

- 1** Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2** Click **New**. This opens the **New user name** dialog.
- 3** Enter the user name for the new user into the provided box.
- 4** Click **OK**. This creates the user and closes the **New user name** dialog.
- 5** In the user details section, do the following:
 - a** Specify a password in the **Password** box.
 - b** Enter the same password in the **Confirm Password** box.
 - c** If desired, fill out the other boxes.
 - d** Select one or more of the following password options:
 - **User Must Change Password at Next Logon**
 - **User Cannot Change Password**
 - **Password Never Expires**
 - **Account Disabled**



NOTE If you do not select a password option, users must change their passwords every 60 days. Users get a warning that gives them the opportunity to change their password 14 days before their current password is due to expire. The warning is displayed every time users log in using any Dimensions RM tool.

- e** If you are using LDAP or SSO for login, select the Login Source.
- 6** Click **Save**.

Copying an Existing User

To copy an existing user:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 Select the user you want to copy in the user list.
- 3 Click **Copy**. This opens the **New user name** dialog.
- 4 Enter the user name for the new user into the provided box.
- 5 Click **OK**. This creates the user with all data of the user you copied from and closes the **New user name** dialog.
- 6 In the user details section, do the following:
 - a Specify a password in the **Password** box.
 - b Enter the same password in the **Confirm Password** box.
 - c If desired, fill out the other boxes.
 - d Select one or more of the following password options:
 - **User Must Change Password at Next Logon**
 - **User Cannot Change Password**
 - **Password Never Expires**
 - **Account Disabled**



NOTE If you do not select a password option, users must change their passwords every 60 days. Users get a warning that gives them the opportunity to change their password 14 days before their current password is due to expire. The warning is displayed every time users log in using any Dimensions RM tool.



NOTE Copying a user copies permissions (e.g. the "Create Class" right), assigned groups, instance assignments and the user info.

Editing a User

To edit a user:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 Select a user in the user list.
- 3 In the user details section, do any the following:
 - a To change the password, specify a password in the **Password** box and enter the same password in the **Confirm Password** box.
 - b Edit the content of the other boxes.

- c Select one or more of the following password options:
 - **User Must Change Password at Next Logon**
 - **User Cannot Change Password**
 - **Password Never Expires**
 - **Account Disabled**



NOTE If you do not select a password option, users must change their passwords every 60 days. Users get a warning that gives them the opportunity to change their password 14 days before their current password is due to expire. The warning is displayed every time users log in using any Dimensions RM tool.

- 4 Click **Save**.

Changing the Login of a User

To change a user's login:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 Select a user in the user list.
- 3 Enter the new login name into the **User ID** box.
- 4 Click **Save**.

Assigning a User to one or several Groups

To assign a user to one or several groups:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 Select a user in the user list.
- 3 Click . This opens the **Group Assignment** dialog.
- 4 Select one or several groups in the **Not a member of** list.



NOTE The **Group Assignment** dialog only shows groups belonging to the current Dimensions RM instance.

- 5 Click .
- 6 Click **Save**.

Un-Assigning a User from one or several Groups

To un-assign a user from one or several groups:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.

- 2 Select a user in the user list.
- 3 Click . This opens the **Group Assignment** dialog.
- 4 Select one or several groups in the **Member of** list.



NOTE The **Group Assignment** dialog only shows groups belonging to the current Dimensions RM instance.

- 5 Click .
- 6 Click **Save**.

Deleting a User

To delete a user:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 Select the user you want to delete in the user list.
- 3 Click **Delete**. This opens the **Confirm user delete** dialog.
- 4 Click **OK** to delete the user.

Managing Groups

The following sections describe how to add a user to a group and how to remove a user from a group using RM Browser.

Assigning Users to a Group

To assign users to a group:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 In the left column, select **Group Assignment**.
- 3 Select the group you want to assign users to from the Group box. Note that groups used by the current Dimensions RM instance are marked with a check mark.
- 4 In the **Not assigned** list, select the user or users you want to assign.
- 5 Select the category assignment method:
 - **Automatically assign user(s) to group categories:** Adds the user to all categories the group has access and **grants** access.
 - **Assign user(s) to categories selectively:** Adds the user to all categories the group has access and **denies** access.

- 6 Click  .
- 7 Click **Save**.
- 8 If you have selected **Assign user(s) to categories selectively**, select **Category Assignment** in the left column and follow the instructions in chapter "[Managing Access Rights](#)" on page 343.

Un-Assigning Users from a Group

To un-assign users from a group:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 In the left column, select **Group Assignment**.
- 3 Select the group you want to un-assign users from in the Group box.
- 4 In the **Assigned** list, select the user or users you want to un-assign.
- 5 Click  .
- 6 Click **Save**.

Managing Teams

About Teams

Teams in Dimensions RM are a great way to organize people in the same way as they are in the real world. If a user attribute is configured to Team mode, you can assign a team instead of a group or individual users. A team can have users of different groups (e.g. supervisor and executive staff). As with any other attribute, you can search for requirements where that attribute matches (or not matches) a certain team. However, the following scenarios teams are a helpful addition:

- **Agile:** Teams can be assigned to releases and sprints.
- **Workflow:** As a user attribute can be used to define the owner of a requirement, in Team mode this means that all members of the team own that requirement. This means that any team member can process the requirement.

Before you start

Before you can use teams, you must do the following:

- 1 Enable the Teams functionality; for details see chapter "[Team Settings](#)" on page 75.
- 2 On the desired classes, ensure that a user attribute with selection mode "Teams" is available. For details on how to add or edit attributes, see chapter *Attributes* in the *Dimensions RM Administrator's Guide*.

Creating a New Team

To create a new team:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 In the left column, select **Teams**.
- 3 Click **New**. This opens the **New Team** dialog.
- 4 Enter the name for the new team into the provided box.
- 5 Click **OK**. This creates the team and closes the **New Team** dialog.

Editing a Team

To rename a team:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 In the left column, select **Teams**.
- 3 From the **Teams** box, select the team you wish to rename.
- 4 Click **Edit**. This opens the **Edit Team** dialog.
- 5 Enter the new name for the team into the provided box.
- 6 Click **OK**. This renames the team and closes the **Edit Team** dialog.

Copying an Existing Team

To copy a team:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 In the left column, select **Teams**.
- 3 From the **Teams** box, select the team you wish to copy.
- 4 Click **Copy**. This opens the **Copy Team** dialog.
- 5 Enter the name for the new team into the provided box.
- 6 Click **OK**. This creates the team with the users from the original team and closes the **Copy Team** dialog.

Deleting a Team

To delete a team:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.

- 2 In the left column, select **Teams**.
- 3 Select the team you wish to delete.
- 4 Click **Delete**. This opens the **Delete Team** dialog.
- 5 Click **OK**. This deletes the team and closes the **Delete Team** dialog.

Assigning Users to a Team

To assign users to a team:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 In the left column, select **Teams**.
- 3 From the **Teams** box, select the team you wish to assign users to.
- 4 In the **Not assigned** list, select the user or users you want to assign.
- 5 Click  .
- 6 Click **Save**.

Un-Assigning Users from a Team

To un-assign users from a team:

- 1 Select **Manage Users** from the **Administration** menu. This opens the **User Management** dialog.
- 2 In the left column, select **Teams**.
- 3 From the **Teams** box, select the team you want to un-assign users from.
- 4 In the **Assigned** list, select the user or users you want to un-assign.
- 5 Click  .
- 6 Click **Save**.

Managing Categories

The following sections describe ways you can manage categories in RM Browser. Only users who belong to the Administrators group can open the **Manage Categories** dialog.

About Categories

Categories are represented by a hierarchical structure inside each Dimensions RM instance, with sub-categories supported. Categories work like folders on a file system, with "favorites" selected such that an individual user can set and easily access defaults.

Categories are often structured to mimic the associated source code folders, by component, in order to provide a familiar look and feel. All RM objects, including reports, can be managed within categories, and, like folders on the file system, an object can only be contained in only one category. Each node of the category hierarchy can have different permissions settings for user groups. All nodes in the hierarchy share the same schema.

The topmost category is the name of the Dimensions RM instance. The category structure is displayed in the leftmost pane on the home page. The current category path (as with folders on the file system) is displayed just under the menu on the browser. The path from the requirements tab, as well as from all relevant dialogs, can be expanded for selection or modification.

Permissions to categories are granted to the group, for example, read access can be assigned to all groups while the permission to modify can be restricted to the group "owning" the requirements within the category.

An administrator or selected power users can assign category permissions in RM Manage or using related functions in the **Manage Categories** dialog of RM Browser. For further information about access rights for categories, see chapter "[Managing Access Rights](#)" on page 343.

Naming Conventions

- **Allowed characters:** All characters and Unicode characters except
 - Backslash (\)
 - Forward slash (/)
- **Maximum length:** Up to 64 characters
- **Maximum length for full path:** Up to 1024 characters
The full path contains all category names from the root category to category you wish to create. For each category level, a backslash is added (e.g. RMDEMO\Data).

Adding a Category

To add a category:

- 1 Select **Manage categories** from the **Administration** menu. This opens the **Manage Categories** dialog.
- 2 Click **New Category**.
- 3 In the **Category Name** field, type the name of the new category. You can enter a maximum of 64 characters.
- 4 In the **Description** field, type an optional category description. This description appears as a tooltip when you hover over the category in the category tree.
- 5 In the **Parent Category** tree, select the parent category for the new category.
- 6 Click the **Add** button.

Deleting a Category

To delete a category:

- 1 Select **Manage categories** from the Administration menu. The Manage Categories dialog opens.
- 2 Select the category you want to delete and click **Delete Category**.
- 3 When prompted to confirm the deletion, click **OK**.



NOTES You cannot delete the root category or any category that has subcategories. To delete a category with subcategories, delete the subcategories first. You cannot delete a subcategory if it contains objects, scripts, or filters.

Renaming a Category

To rename a category or its description:

- 1 Select **Manage categories** from the Administration menu. The Manage Categories dialog opens.
- 2 Select the category you want to rename.
- 3 Click **Rename Category**.
- 4 In the **Category Name** field, type the new name. You can enter a maximum of 64 characters.
- 5 In the **Description** field, enter an optional category description. This description appears as a tooltip when you hover over the category in the category tree.
- 6 Click the **Rename** button.

Activating/Deactivating a Category

When a category is inactive, by default it is not available in the category tree. This means that you cannot access objects in that category. Whether to show or hide a category, is configured in the general user settings. For further information, see chapter "[Categories: Show Inactive Categories](#)" on page 75.

A deactivated category is represented by a name in gray and italic text.

To activate a category:

- 1 Select **Manage categories** from the **Administration** menu. This opens the **Manage Categories** dialog.
- 2 Select an inactive category you want to activate.
- 3 Click **Activate/Deactivate Category**. This opens the **Activate Category** dialog.
- 4 Confirm the **Activate Category** dialog by clicking **Yes**.

To deactivate a category:

- 1 Select **Manage categories** from the **Administration** menu. This opens the **Manage Categories** dialog.
- 2 Select an active category you want to deactivate.
- 3 Click **Activate/Deactivate Category**. This opens the **Deactivate Category** dialog.
- 4 Confirm the **Deactivate Category** dialog by clicking **Yes**.

Moving a Category

To move a category:

- 1 Select **Manage categories** from the Administration menu. The **Manage Categories** dialog opens.
- 2 Drag and drop the category to the desired location in the tree.

Managing Access Rights

By managing access rights for a category, you define which user or group is assigned as a role for a category and the rights (e.g. read, replace, update) they have. This affects access and rights on requirements, dashboards, documents, reports, collections or baselines in this category. The **Access Rights** dialog provides the following functions:

- **Show All:** Shows access for all users.
- **Show access for User:** Shows access for a single user.
- **Find category:** Filters the category tree for the entered category.
- **Find user:** Filters the access rights tree for the entered user name.
- **Inherit access rights from parent category:** If enabled, the rights of a category are identical with the rights of the parent category. If disabled, you can set individual access rights for that category.
- **Copy User Access:** Opens a dialog which allows to copy access rights for all category from the selected user to another user.
- **Remove All Assignments:** Removes access to all category for the selected user.

Changing Access Rights for a Category

To change the access rights for a category:

- 1 Select **Manage categories** from the **Administration** menu to open the **Manage Categories** dialog.
- 2 Click **Access Rights**.
- 3 Ensure that the **Show All** option is selected.
- 4 Select the category for which you want to change the access rights.



TIP To quickly locate a category in the tree, type its name or part of it into the **Find category** box.

- 5 Ensure that the **Inherit access rights from parent category** box is clear.
- 6 Select the users or groups you want to grant access or deselect the users or groups you want to deny access.



TIP To quickly locate a user or group in the tree, type its name or part of it into the **Find user** box.

- 7 If required, modify access rights for other categories.
- 8 Click **OK**.

Viewing Access Rights for a Single User Account

To view the access rights for a single user account:

- 1 Select **Manage categories** from the **Administration** menu to open the **Manage Categories** dialog.
- 2 Click **Access Rights**.
- 3 Select the **Show access for User** option.
- 4 Select a user from the drop-down list or find a user by clicking  , which opens the **Find & Select User** dialog (see chapter ["Find & Select Dialog" on page 42](#)).
- 5 For categories, the selected user has access, the category tree shows the group which allows access next to the category name.

Copying Access Rights to Another User Account

When you create a user account, the new user has access to all categories for which his groups allow access. If you want to limit (or grant for existing users) the access rights, you may just copy from an existing user.



TIP If you have several different access right setups, you may want to create a user account which acts as a template. This account should be named that it identifies the purpose and - for security reasons - be disabled. For further information on how to create user accounts, see chapter ["Creating a New User" on page 334](#).

To copy access rights to another user account:

- 1 Select **Manage categories** from the **Administration** menu to open the **Manage Categories** dialog.
- 2 Click **Access Rights**.
- 3 Select the **Show access for User** option.
- 4 Select a user from the drop-down list or find a user by clicking  , which opens the **Find & Select User** dialog (see chapter ["Find & Select Dialog" on page 42](#)).
- 5 Click **Copy User Access...** to open the **Copy Category Group Assignment to** dialog. This dialog contains only users which are in the same group(s) as the selected user.
- 6 Select one or several users.

- 7 Click **OK** to close the **Copy Category Group Assignment to** dialog.
- 8 Click **OK** to close the **Access Rights** dialog.

Removing Access Rights for a User Account

If you want to remove all access rights for a user account, this means that the user can still log on to RM Browser, but is unable to view or edit any object (e.g. requirements).

To remove access rights for a user account:

- 1 Select **Manage categories** from the **Administration** menu to open the **Manage Categories** dialog.
- 2 Click **Access Rights**.
- 3 Select the **Show access for User** option.
- 4 Select a user from the drop-down list or find a user by clicking , which opens the **Find & Select User** dialog (see chapter "[Find & Select Dialog](#)" on page 42).
- 5 Click **Remove All Assignments...**
- 6 Confirm the dialog to remove all category/group assignments.
- 7 Click **OK** to close the **Access Rights** dialog.

Moving Requirements Between Categories

A requirement can exist in only one category at a time, so moving a requirement to a different category also removes it from the category it was in before. The Organize by Category dialog allows you to specify search criteria to locate the requirements that you wish to move.



NOTE For information on the administrative functions you can perform with categories, see the *Dimensions RM Administrator's Guide*.

To move requirements between categories:

- 1 Select **Organize by Category** from the Administration menu. The **Organize by Category** dialog opens.
- 2 **Look for class:** Select a class in which to search for requirements. If an object was selected when you invoked the dialog, this field will be pre-populated; change it as needed.
- 3 **Filters:** If you saved filters in Quick Search, you can use these filters to search the requirement you wish to move.
- 4 **Manage Categories:** Click this link if you want to create, rename, or delete any categories before proceeding with the move procedure. The Manage Categories dialog opens. See "[Managing Users](#)" on page 334.
- 5 **Remember these options:** Select this checkbox to retain the current settings as the default for future invocations of the dialog.

- 6 **Constraints:** As needed, specify criteria to locate the desired requirements. See ["Attribute Constraints Tab" on page 43](#) and ["Relationship Constraints Tab" on page 49](#).
- 7 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 52](#).
- 8 **Find Now:** Click this button to run the search. The results are displayed in the lower pane of the dialog.
- 9 **New Search:** Click this button to clear the current search criteria and results.
- 10 Select the desired requirements in the search results. For multi-selection of requirements, see chapter ["Selecting Multiple Requirements" on page 33](#).
- 11 **Category:** Select the category to which you want to move the selected requirements.
- 12 Click the **Move** button.

Managing Document Locks

To break locks on documents:

- 1 Select **Document Locks** from the Administration menu. The Document Locks dialog opens.
- 2 **Unlock All:** Click this button to unlock all locked documents.
- 3 **Unlock Selected:** Click this button to unlock only the selected documents. Ctrl-click to select multiple documents.
- 4 **Refresh:** Click this button to update the display of locked documents.

Managing Requirement Locks

To break locks on requirements:

- 1 Select **Requirement Locks** from the Administration menu. The Requirement Locks dialog opens.

Requirement Locks							
CLASS	PUID	TITLE	USER	HOST	TIMESTAMP	OBJECT ID	SESSION
Component_Requirements	COMP_000005	Last 5 images will be remembered	MARY	192.168.6.47	17-JUN-2020@13:41:28	176	15923939995

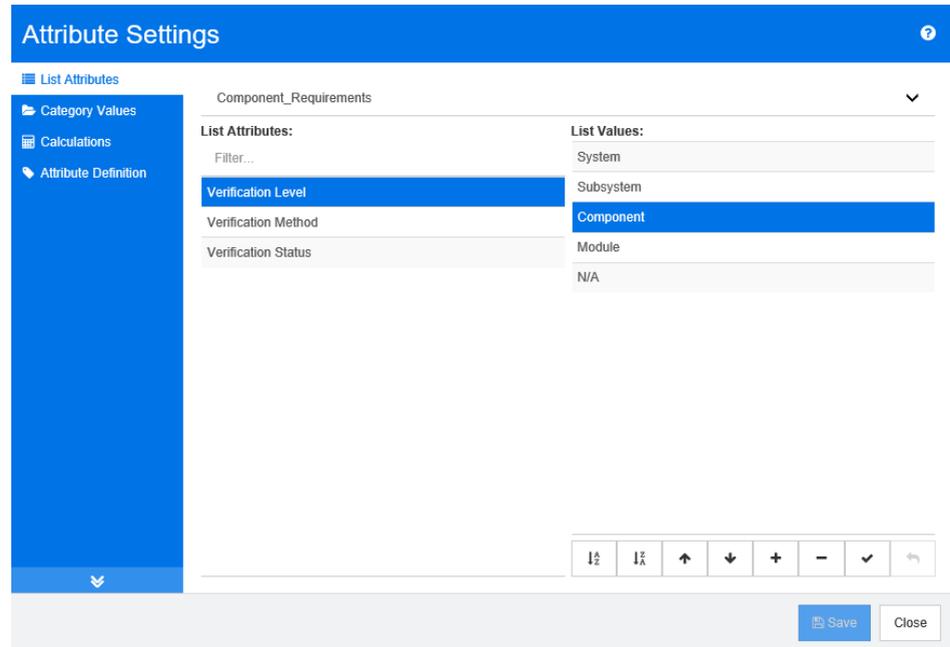
Refresh Unlock Selected Unlock All Close

- 2 **Unlock All:** Click this button to unlock all locked requirements.
- 3 **Unlock Selected:** Click this button to unlock only the selected requirements. Ctrl-click to select multiple requirements.
- 4 **Refresh:** Click this button to update the display of locked requirements.

Managing List Attribute Values

With the **Attribute Settings** dialog you can add or remove list entries and make list values available to certain categories only.

To open the **Attribute Settings** dialog, select **Attribute Settings** from the **Administration** menu.



Adding List Values

To add a list value, do the following:

- 1 In the left pane, click **List Attributes**.
- 2 Select the class you want to modify from the box on the top.
- 3 From the **Lists** box, select the list attribute you want to add the value to.
- 4 Click **+**. This opens the **New Value Name** dialog.
- 5 Enter the new value and click **OK**.
- 6 Click **Save**.

Deleting List Values

To delete a list value, do the following:

- 1 In the left pane, click **List Attributes**.
- 2 Select the class you want to modify from the box on the top.
- 3 From the **Lists** box, select the list attribute from which you want to remove a value.

- 4 Click .



NOTE

- If the selected value is not used in any requirement, it will be **removed**.
- If the selected value is used in any requirement, this opens a dialog which allows you to **Delete** or **Remove** the attribute value.

Deleting a value means:

- The value is visible in requirements having this value, but cannot be selected.
- The value is available in all dialogs which allow filtering or searching (e.g. Quick Search).

Removing a value will completely delete it from RM's database. This means:

- The attribute in a requirement which previously used this value is empty.
- The value is no longer available in any dialog.

If you want to replace an old/obsolete value in requirement versions, see "[Changing a List Value on Existing Data](#)" on page 348.

- 5 Click **Save**.

Ordering List Values

The end user will see the values in the same order shown in this dialog.

To reorder the list of values, do any of the following:

- 1 In the left pane, click **List Attributes**.
- 2 Select the class you want to modify from the box on the top.
- 3 From the **Lists** box, select the list attribute you want to order. Then, do one of the following:
 - To manually order the values, select a value and click the **Move Up**  or **Move Down**  button to move the value to the desired position.
 - To alphanumerically sort the entire list of values, click the **Sort Ascending**  or **Sort Descending**  button.
- 4 Enter the new value and click **OK**.
- 5 Click **Save**.

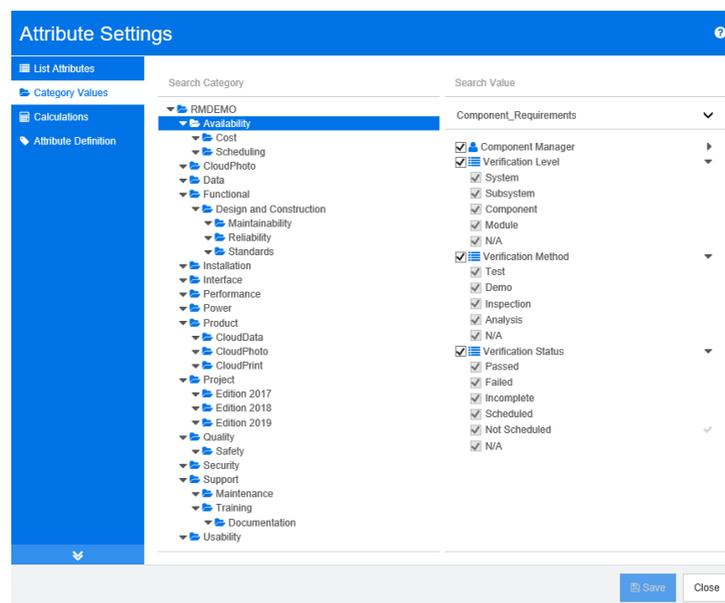
Changing a List Value on Existing Data

This section describes a suggested best practice for changing a list value that has been in use and thus exists in non-current requirement versions. It presupposes that you need to replace an obsolete list value in non-current versions and that an audit trail must be maintained.

- 1 Create a backup of the instance, including security. For further information on creating a backup, see chapter "Backing Up an Instance Account" in *Dimensions RM Administrator's Guide*.
- 2 Add the new list value to the instance schema. (Do not remove the old value.)
- 3 Ensure that you have both Update and Update Non-Current access to the class that includes the modified list.
- 4 Create a report that lists:
 - PUID
 - Object_ID
 - The relevant list field with the obsolete value
- 5 Save the report as CSV.
- 6 Edit the CSV to change the obsolete value to the new value.
- 7 Add a **Reason for change** column and populate it with whatever statement satisfies your audit requirements. (This will overwrite existing **Reason for Change** entries.)
- 8 Use CSV Import in **Update** mode to match on Object_ID and map the list and reason for change attributes.
- 9 Verify that the data was correctly imported.
- 10 Remove your Update and Update Non-Current access to the class (assuming you added these just for this procedure).
- 11 Remove the old list value from the instance schema.

Limiting List Values to Categories

When using the categories in Dimensions RM for sub-projects, it can be useful to allow only certain values when the category is selected.



To limit list values to categories, do the following:

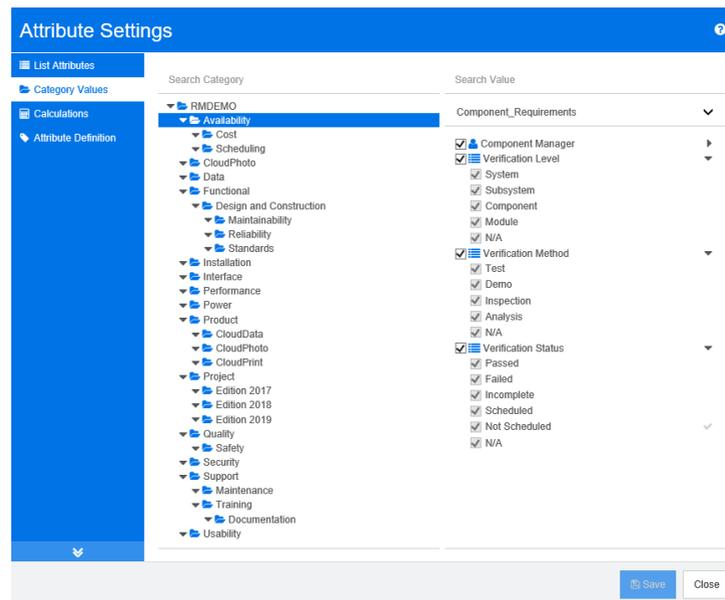
- 1 In the left pane, click **Category Values**.
- 2 In the category tree, select the category for which you want to limit list values.
- 3 Select the class for which you want to modify list values access.
- 4 Clear the box next to the attribute name.
- 5 Expand the attribute.
- 6 Clear the box for the value you want the hide.
- 7 Click **Save**.

To restore inheritance of the parent category, do the following:

- 1 In the left pane, click **Category Values**.
- 2 In the category tree, select the category for which you want to restore inheritance for list values.
- 3 Tick the box next to the attribute name.
- 4 Click **Save**.

Defining Default List Values for Categories

When using the categories in Dimensions RM for sub-projects, it can be useful to have a different default value.

**To define a default list values for a category, do the following:**

- 1 In the left pane, click **Category Values**.

- 2 In the category tree, select the category for which you want to define a different default values.
- 3 Select the class for which you want to modify list values access.
- 4 Clear the box next to the attribute name.
- 5 Expand the attribute.
- 6 Move the mouse point over the value which you want to use as a default value. A grey tick appears.
- 7 Click the grey tick. The tick turns blue, which indicates that this value is used as the default value.
- 8 Click **Save**.

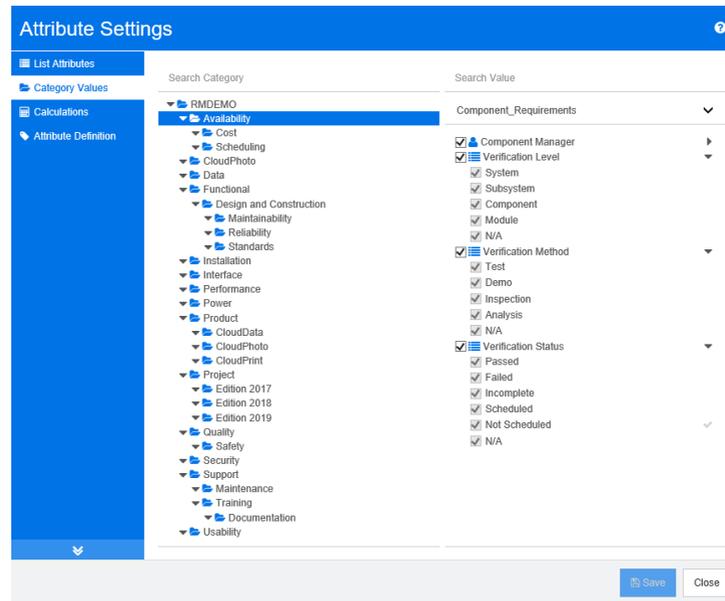
To restore inheritance of the parent category, do the following:

- 1 In the left pane, click **Category Values**.
- 2 In the category tree, select the category for which you want to restore inheritance for list values.
- 3 Tick the box next to the attribute name.
- 4 Click **Save**.

Managing User Attribute Values

Defining Default Users for Categories

When using the categories in Dimensions RM for sub-projects, it can be useful to have a different default user.



To define a default user for a category, do the following:

- 1 In the left pane, click **Category Values**.
- 2 In the category tree, select the category for which you want to define a different default values.
- 3 Select the class for which you want to modify list values access.
- 4 Clear the box next to the attribute name.
- 5 Move the mouse point over the value which you want to use as a default value. A grey tick appears.
- 6 Click the grey tick. The tick turns blue, which indicates that this value is used as the default value.
- 7 Click **Save**.

Configuring Calculated Attributes

Calculated attributes can be used with numeric, alphanumeric, text, and list attributes. In order to use calculated attributes, the attribute receiving the calculation result must be read-only. To make an attribute read-only, turn off the **Attribute Editable** setting. For further information on creating attributes, see section *Attributes* in chapter *Class Definition* in *Dimensions RM Administrator's Guide*.

Adding a Calculated Attribute

To add a calculated attribute, do the following:

- 1 Select **Attribute Settings** from the **Administration** menu. This opens the **Attribute Settings** dialog.
- 2 In the left pane, click **Calculation**.
- 3 Click **New**. This opens the **Create Calculation** dialog.
- 4 From the **Class** box, select the class which contains the calculated attribute.
- 5 From the **Calculated Attribute** box, select an attribute to receive the result. Note that the list only contains attributes which are read-only.



NOTE If you can't find the desired class in the **Class** box or the attribute in the **Calculated Attribute** box, the desired numeric attribute may be editable. For information how to make attributes read-only, see section *Attributes* in chapter *Class Definition* in *Dimensions RM Administrator's Guide*.

- 6 In the **Formula** box, specify the formula. For further information on formulas, see chapter ["About Formulas"](#) on page 354.
- 7 Click **Save**.



NOTE For existing requirements, the value will not be calculated automatically. To calculate the value for existing requirements, modify the value of one attribute referenced in the **Formula** box.

Editing a Calculated Attribute

To edit a calculated attribute, do the following:

- 1 Select **Attribute Settings** from the **Administration** menu. This opens the **Attribute Settings** dialog.
- 2 In the left pane, click **Calculation**.
- 3 From the list of calculated attributes, select the attribute configuration you want to modify and click **Edit**. This opens the **Edit Calculation** dialog.
- 4 In the **Formula** box, modify the formula. For further information on formulas, see chapter ["About Formulas"](#) on page 354.
- 5 Click **Save**.

Deleting a Calculated Attribute

To delete a calculated attribute, do the following:

- 1 Select **Attribute Settings** from the **Administration** menu. This opens the **Attribute Settings** dialog.
- 2 In the left pane, click **Calculation**.

- 3 From the list of calculated attributes, select the calculated attribute you want to delete.
- 4 Click **Delete**. This opens the **Delete Calculation** dialog.
- 5 Confirm that you want to delete the calculated attribute. This removes the calculated attribute configuration.



NOTE The attribute will still be available on dialogs. If you want to remove it permanently, enable it for editing or hide it, see section *Attributes* in chapter *Class Definition* in *Dimensions RM Administrator's Guide*.

About Formulas

About Formulas for Numeric Attributes

Formulas can contain numbers, or reference numeric attributes, even if these attributes are in a different class. Formulas can use parentheses to allow changing the priority of calculations.

About Formulas for Alphanumeric or Text Attributes

Formulas can contain texts, or reference alphanumeric or text attributes of the same class. Alphanumeric or text attributes can be concatenated with other alphanumeric or text attributes, or static text.

Alphanumeric and text attributes only support the **+** operator (concatenate texts).

Referencing Numeric Attributes from the same Class

To use numeric attributes from the same class, the **Related Class** option must be clear.

To insert a numeric attribute from the same class:

- 1 From the **Insert Attribute** box, select the desired attribute.
- 2 Click **Insert**.

To insert a static number, do the following:

- 1 At the desired position, click into the **Formula** box.
- 2 Type the desired number.

To insert an operator, do the following:

- 1 From the **Insert Operator** box, select the desired operator.
- 2 Click **Insert**.

Referencing Numeric Attributes from Other Classes

To use numeric attributes from other classes, these two classes must have a relationship (see chapter "Relationships" in the *Administrator's Guide*). Note that when using Numeric attributes from other classes, you can use aggregate functions Sum, Average, Min, and Max only.

To reference a numeric attribute from another class:

- 1 Ensure that the **Related Class** option is selected and select the related class.
- 2 From the **Insert Attribute** box, select the desired attribute.
- 3 Click **Insert**.

To insert a function:

- 1 Ensure that the **Related Class** option is selected and select the related class.
- 2 From the **Insert Function** box, select the desired function.
- 3 Click **Insert**.

Referencing Alphanumeric or Text Attributes

To use alphanumeric or Text attributes, the **Related Class** option must be clear.

To insert an alphanumeric or text attribute:

- 1 From the **Insert Attribute** box, select the desired attribute.
- 2 Click **Insert**.

To insert static text, do the following:

- 1 At the desired position, click into the **Formula** box.
- 2 Type your text surrounded by single quotes, e.g. 'Your text'.

To concatenate texts, do the following:

- 1 From the **Insert Operator** box, select +.
- 2 Click **Insert**.

Referencing List Attributes from another Class

Referencing list attributes from another class may be helpful if you need to match certain conditions based on the linked requirements.

Example Use Case:

You have the classes `Product_Requirement` and `Function_Requirement`. With the relationship (link) between the two classes, `Product_Requirement` is the parent and `Function_Requirement` is the child. Both classes have a list attribute "Security" with the values: Low, Medium and High. By using calculated list attributes you can define that if one linked `Function_Requirement` has Low selected with its Security attribute, also the `Product_Requirement` shows Low for its Security attribute.

To reference a list attribute, do the following:

- 1 Ensure that the **Related Class** option is selected and select the related class.
- 2 From the **Calculated Attribute** box, select the attribute to receive the calculated value.
- 3 From the **Insert Attribute** box, select the desired attribute.



IMPORTANT! The calculated attribute must have the same values as the attribute in the insert attribute.

- 4 From the **Insert Function** box, select **Max** or **Min**.



NOTE

The Insert function defines which value is propagated into the attribute of the parent class.

- **Min:** The lowest value is propagated.
- **Max:** The highest value is propagated.

Example:

The attribute has values Val1, Val2, Val3 and Val4. Requirements only use Val2 and Val3 of the attribute.

- **Min:** Value Val2 is propagated.
- **Max:** Value Val3 is propagated.

- 5 Click **Insert**.
- 6 Click **Order Values**. This opens the **Order Values** dialog.
- 7 Change the order of items in the **Order from Maximum to Minimum** list either by drag and drop or by selecting it and clicking  or  .
- 8 Click **OK** to close the **Order Values** dialog.

Defining Attributes

Starting with Dimensions RM release 12.8, you can define attributes with RM Browser.

Attributes specify the exact nature of the information within a class or relationship. You can define any number of attributes for each class. In addition to these user-defined attributes, there are implicit predefined attributes.



NOTE

- There are two implicit attributes that represent who created a requirement. The "Initial Created by" attribute contains the name of the user who initially created a requirement, and is retained when the requirement is replaced by another user. The name of the user who replaced the requirement is stored in the "Created by" attribute.
- Relationship attributes must be created with the Class Definition tool. For further information, see chapter "Class Definition" in the *Administrator's Guide*.

To open the Attribute Definition dialog, do the following:

- 1 From the **Administration** menu, select **Attribute Settings**.
- 2 In the left pane, select **Attribute Definition**.

Attribute Types

The following sections describe the attribute types. If the attribute has a second tab specific to the attribute, its parameters are included in the description.

	Attribute Type	Description	Page
	Alphanumeric	A single line of text up to 1000 characters.	360
	Date	A date, the format of which (including length, default, minimum, and maximum values) can be defined by the administrator.	361
	File Attachment	Can hold one or several files to be accessed from RM Browser.	362
	Group	Like a list attribute, but composed of a series of sub attributes. The choices available to the user <i>depend</i> upon the selections they made in the higher level, or parent, attributes within the group attribute.	362
	List	A list of values configured by the administrator for user selection. A list attribute can be configured to display as check box(es) or radio buttons.	365
	Numeric	Accepts only numeric values.	371
	Text	A block of text up to 64Kb in size.	372
	URL	Allows to specify one or several URLs.	373
	User	A list of user names, which can be configured by group or individual user names.	374

Adding an Attribute

To add a new attribute to a class:

- 1 From the **Administration** menu, select **Attribute Settings**.
- 2 In the left pane, select **Attribute Definition**.
- 3 From the **Class** box, select the class to which you want to add the new attribute.
- 4 Click **New** and select the desired attribute type from the list. For further information about attribute types, see ["Attribute Types" on page 357](#).

Defining an Attribute

To define an attribute:

- 1 From the **Administration** menu, select **Attribute Settings**.
- 2 In the left pane, select **Attribute Definition**.
- 3 From the **Class** box, select the class for which you want to modify the new attribute definition.
- 4 Change the attribute properties as desired or required for the selected attribute type. For a list of attribute types, see chapter ["Attribute Types" on page 357](#).

Common Attribute Properties

The common attribute properties are displayed for all attribute types. The following table describes their function.

Property	Description
Display Name	The name of the attribute that will be displayed by the other Dimensions RM tools. Please consider the naming restrictions when specifying the display name. For details about naming restrictions, see chapter <i>"Naming Conventions for Attribute Display Names"</i> in the <i>Administrator's Guide</i> .
Attribute Name	The internal name of the attribute, which is populated automatically for a new attribute based on the display name if no value is provided. Please consider the naming restrictions when specifying the attribute name. For details about naming restrictions, see chapter <i>"Naming Conventions for Attribute Names"</i> in the <i>Administrator's Guide</i> .
Description	Enter a description which explains the purpose of this attribute.
Attribute Mandatory	Whether you are required to specify values for the attribute during the information storage or capture process.
Attribute Editable	Whether you can edit the attribute values. Conversely, making an attribute non-editable is useful when no further changes to the attribute are allowed.

Property	Description
Force Unique Value	Whether you must enter a unique value for an instance of this attribute (no duplicate values are allowed). This may be grayed out.
Display For Entry	Whether the attribute will be displayed in forms and list views of object content. If unchecked, the attribute will not be presented in these views. This is generally used for security.
Populate on Copy	Whether the attribute will be pre-populated when you copy a requirement. To prevent the situation where duplicate requirements are created by mistake, it is a good practice <i>not</i> to copy the Title and Description attributes. When using Populate on Copy with a container workflow and the container workflow is assigned to a document, the attribute value will be copied to the new document if this option is enabled.
Populate on Create and Link	The attribute will be pre-populated when you create a requirement and link to it. This only applies to relationships where the "populate attributes on create and link" setting is enabled (see chapter "Transfer Rules" in the <i>Administrator's Guide</i>).
Change raises Suspicion	This setting is available for any custom attribute and the following system attributes: <ul style="list-style-type: none"> ■ Workflow State ■ Owner ■ Category <p>If this setting is enabled, any replace action on this attribute will mark linked objects as Suspect if this is enabled in the relationship definition (see chapter "Transfer Rules" in the <i>Administrator's Guide</i>).</p>

Security

With the Class Definition tool you can define create a security profile for each attribute. For further information, see chapter "Security Tab" in the *Administrator's Guide*.

Deleting an Attribute

To delete an attribute from a class or relationship definition:

- 1 From the **Administration** menu, select **Attribute Settings**.
- 2 In the left pane, select **Attribute Definition**.
- 3 From the **Class** box, select the class to which you want to delete the attribute.
- 4 Select the attribute you want to delete from the definition.
- 5 Click the **Remove**.

6 Click **OK**.

NOTE Implicit attributes cannot be deleted from the class or relationship definition.

Alphanumeric Attribute

An alphanumeric attribute represents one line of alphanumeric text, such as the title of an acceptance test. It can be up to 1000 characters in length.

The screenshot shows the 'Attribute Settings' window for the 'Product_Requirements' class. The 'Attributes' list on the left includes 'Title', which is selected. The 'Display Name' is 'Title' and the 'Attribute Name' is 'TITLE'. The 'Description' field is empty. The 'Attribute Mandatory' checkbox is checked, and 'Change raises Suspicion' is also checked. The 'Maximum Length' is set to 1000 and the 'Display Length' is 80. There are 'Save' and 'Close' buttons at the bottom right.

Figure 11-1. Alphanumeric Attribute Definition

The alphanumeric attribute properties are described in the following table.

Property	Description
Maximum Length	The maximum length of the value allowed for the attribute. The valid range is 1 to 1000 characters.
Display Length	The default number of characters to display for this attribute. The valid range is 1 to 1000 characters.
Advanced Settings	
Minimum Value	A minimum value that can be associated with the attribute, if any. Dimensions RM performs a string comparison on the minimum and maximum values. For example, if you enter a minimum value of A and a maximum value of C, Dimensions RM will inform you that a value of D is out of range.

Property	Description
Maximum Value	A maximum value that can be associated with the attribute, if any. Dimensions RM performs a string comparison on the minimum and maximum values. For example, if you enter a minimum value of A and a maximum value of C, Dimensions RM will inform you that a value of D is out of range.
Default Value	A default value for initial instances of the attribute, if required.
Case	Whether the attribute value should be upper case, lower case, or sentence (mixed) case.

Date Attribute

A date attribute can have values that are based on user-defined formats. A date attribute, for example, could be used for test dates.

Figure 11-2. Date Attribute Definition

The date attribute properties are described in the following table.

Property	Description
Display Format	The date format. NOTE: The default date formats use the string "RRRR" to represent a four-digit year. This is preferable to using "YYYY" because when the year is entered as two digits, this format will correctly populate the century based on the rules described in chapter "RRRR Date Format Elements" in the <i>Administrator's Guide</i> .
Default Value	A default value for initial instances of the attribute, if required.

Property	Description
Current Date	If enabled, uses the current server date (and time if defined for the attribute) as a default value.
Advanced Settings	
Maximum Length	The maximum length of the value allowed for the attribute. The valid range is 1 to 1000 characters.
Display Length	The default number of characters to display for this attribute. The valid range is 1 to 1000 characters.
Minimum Value	A minimum value that can be associated with the attribute, if any.
Maximum Value	A maximum value that can be associated with the attribute, if any.

File Attachment Attribute

A file attachment attribute can hold a single file or multiple files that can be accessed through RM Browser. Add one or more file attachment attributes to the class to which the file or files will be attached. For example, you could add the file attachment attributes *Use Cases*, *Customer Letter*, and *Business Justification* to the Marketing Requirements class. Users then use RM Browser to add, view, or download the file(s).

For more information about using RM Browser to view and manage file attachments, see chapter ["Working with File Attachments" on page 140](#).

The file attachment attribute properties of the **Attach Settings** tab are described in the following table.

Property	Description
Allow multiple selections	Whether the attribute can hold one or multiple files. <ul style="list-style-type: none"> ■ Enabled: The attribute can hold multiple files. ■ Disabled: The attribute can hold a single file.

Group Attribute

A group attribute allows to select values like a list attribute. But unlike a simple list attribute, a group attribute is composed of a series of sub-attributes. These sub-attributes

are called **group members**. Each group member contains its own list of values which may be different depending on the selected value of the previous group member.

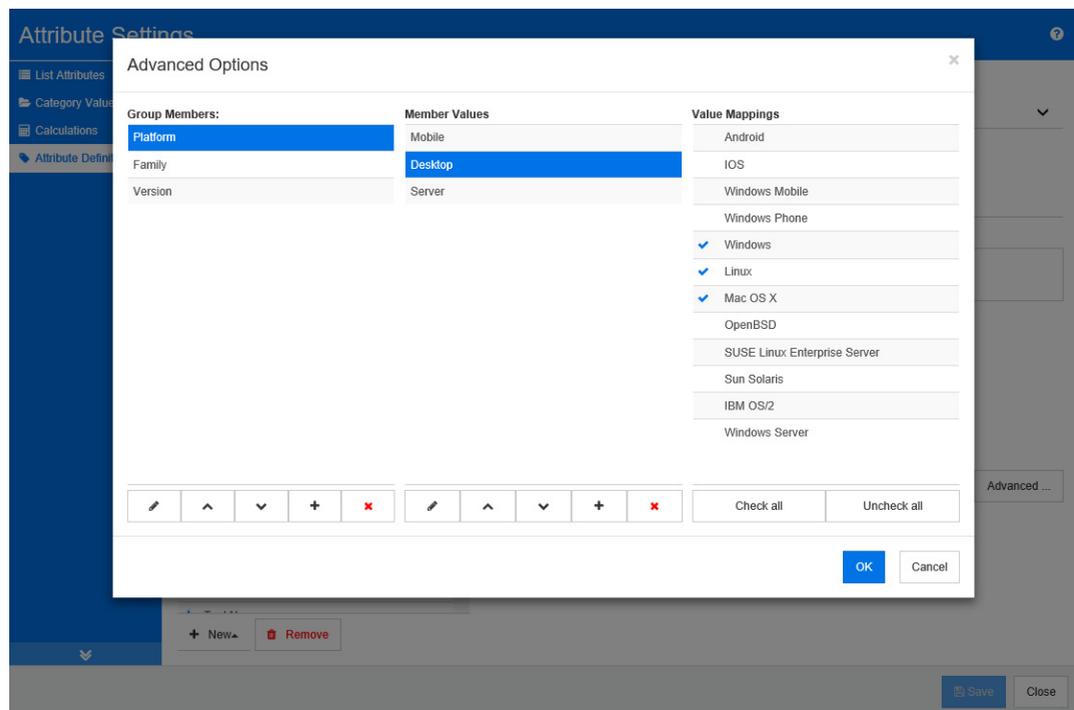


Figure 11-3. Group Attribute Definition

For more details on how the group attribute works, see ["Explaining the Group Attribute"](#) on page 365.

Defining a group attribute:

Property	Description
Allow multiple selections	To allow users adding multiple rows, select this option. The default is cleared (Group attribute supports only one row).

Adding Managing Members (Sub-Attributes)

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 Click **+**. This opens the **Properties for NEW member** dialog.
- 3 Type the member name into the **Display Name** box. If desired, specify a text describing the member into the **Description** box.
- 4 Click **OK**.

Deleting Members (Sub-Attributes)

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 Select the member you want to delete.
- 3 Click **x**.

Ordering Members (Sub-Attributes)

The first attribute in the group is the parent of the second, and the second is the parent of the third, etc. To reorder the attribute members to reflect the dependency logic that you want to enforce do the following:

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 Select the member you want to move.
- 3 Click  or .

Adding Member Values

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 From the **Group Members** list, select the member for which you want to add a value.
- 3 Click . This opens the **Add Value** dialog.
- 4 Enter the new value into the **New value name** box. The value must be unique within the group member.
- 5 Click **OK**.
- 6 If you wish to change the position of a value, select it and click  or  until the value is at the desired position.

Renaming Member Values

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 From the **Group Members** list, select the member for which you want to rename a value.
- 3 Select the value you wish to rename.
- 4 Click . This opens the **Rename Value** dialog.
- 5 Enter the new value into the **New value name** box. The value must be unique within the group member.
- 6 Click **OK**.

Defining Dependencies

By defining dependencies you specify which values are available in a sub-attribute when a user selects a value in a parent attribute.

To define the dependencies do the following:

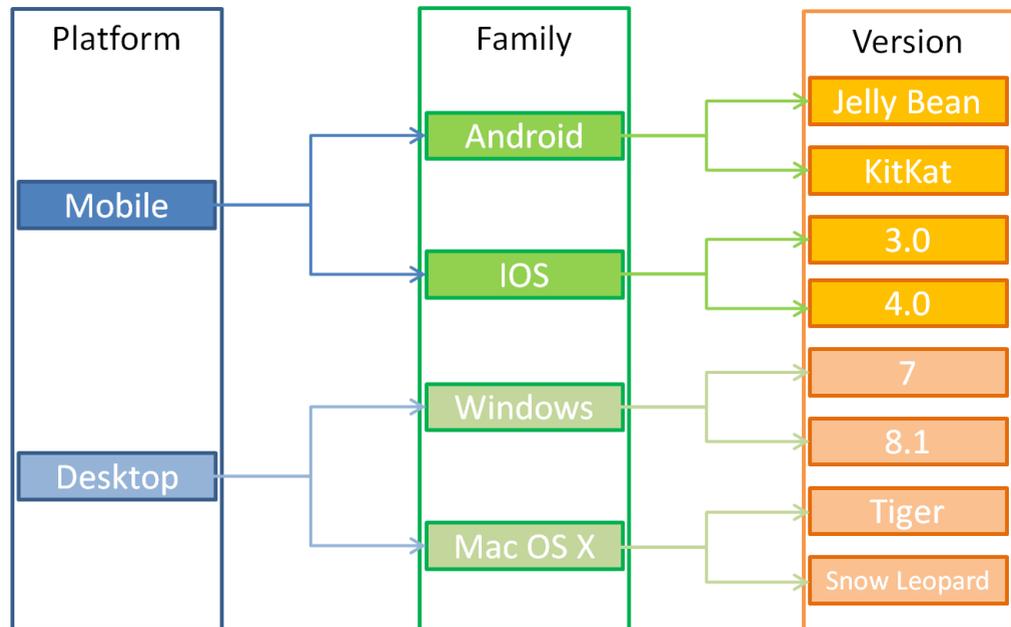
- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 From the **Group Members** list, select the parent attribute (e.g. Platform).
- 3 From the **Member Values** list, select a member value (e.g. Server).
- 4 Click the **Value Mappings** list.

Saving your Changes

- 1 Click **OK** to close the **Advanced Options** dialog.
- 2 Click **Save** to save all your attribute definition changes.

Explaining the Group Attribute

The following image shows a simplified representation of the group attribute **Operating System** of RMDEMO's **Tests** class.



The group attribute contains the group members **Platform**, **Family**, and **Version**. By restriction, you can define which values the user will see when selecting a value. The selection of the **Platform** group member defines the values of the **Family** group member. The selection of the **Family** defines the values of the **Version** group member.

List Attribute

A list attribute is a configurable attribute that provides a list of values for user selection. For example, you could define Passed, Failed, and Incomplete as the valid values for a

list attribute `Verification_Status`, and require that the user choose one or more of these values.

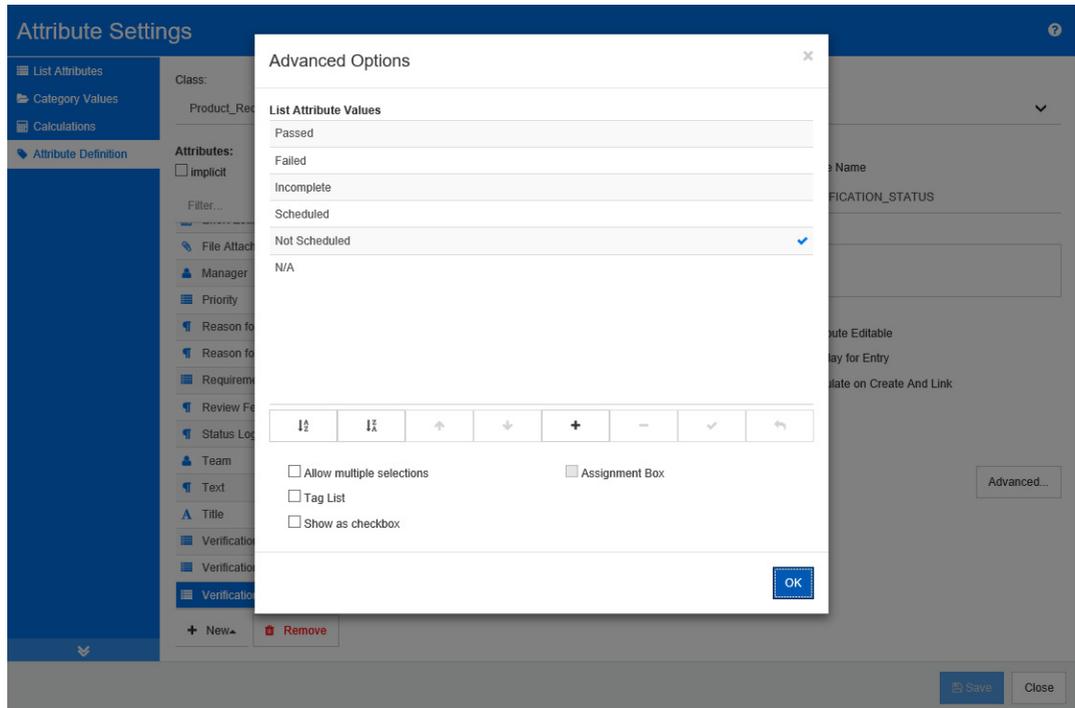


Figure 11-4. List Attribute Definition

A list attribute can also be configured to display as a checkbox or radio buttons.

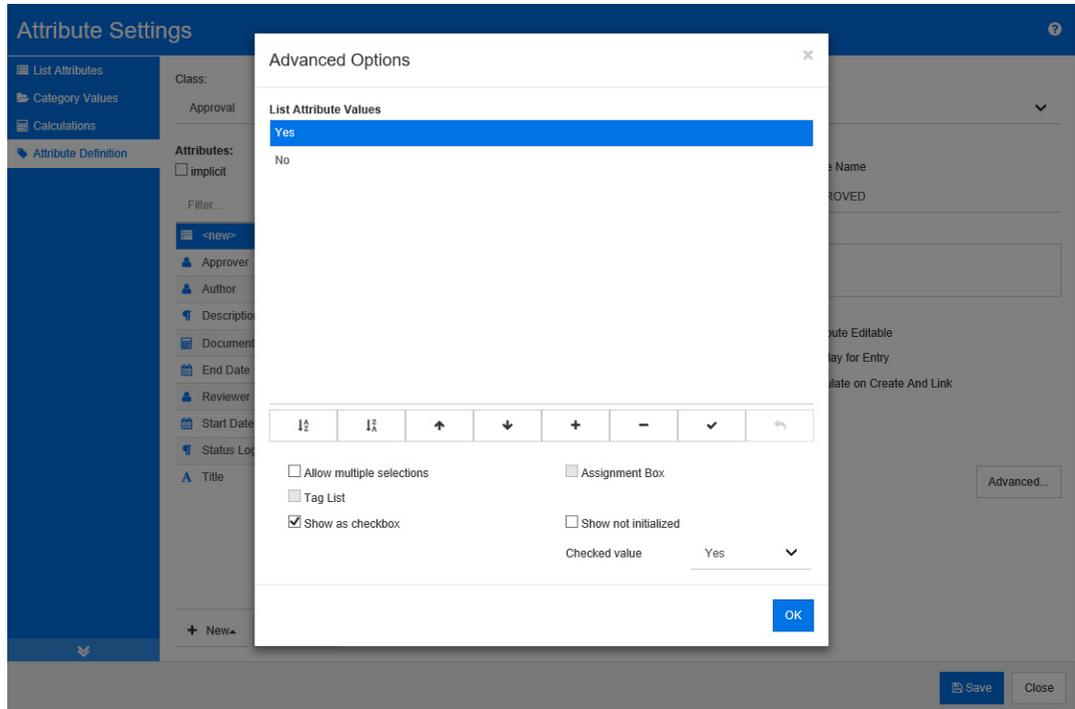


Figure 11-5. List Attribute Definition as Checkbox

Defining a List Attribute

The list attribute properties are described in the following table.

Property	Description
List Values	A list of possible values that have been defined for the list attribute. A check in the box to the left of the value indicates this is a default value. Selecting the check box next to the desired attribute value can change the default value state.
Allow multiple selections	Whether the user can select one or more values from the list. If the box is not checked, you can select only a single value from the list.
Assignment Box	Only available when Allow multiple selections is selected and Tag list is not selected. Enabling this option replaces a single list with two lists which allow adding/removing entries by using  and  .
 Tag List	<p>Attribute values are displayed as "tags". Enabling this option also means that each user having write access can add values to this attribute.</p> <p>CAUTION! When saving the instance schema, all data the Class Definition tool loaded for that schema will be written. If users added tags during the time span the class schema was opened by the Class Definition tool, the users' values will be removed (as the Class Definition tool did not load them when opening the schema).</p> <p>It is strongly suggested to make changes to the class definition outside business hours.</p>
Show as checkbox	The list attribute is displayed as checkbox or radio buttons. For further details, see chapter " Configuring a List Attribute as Check Box / Radio Button " on page 369.
Show not Initialized	Show the option Not Initialized for a radio button or the text Not Initialized for a checkbox. For further details, see chapter " Configuring a List Attribute as Check Box / Radio Button " on page 369.
Checked value	Specifies which list value will be used for the selected state of the checkbox.

Adding List Attribute Values

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 Click . This opens the **New Value Name** dialog.
- 3 Type the value into the box.
- 4 Click **OK**.

Deleting List Attribute Values

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 Select the value you want to delete.

- 3 Click  .



NOTE

- If the selected value is not used in any requirement, it will be **removed**.
- If the selected value is used in any requirement, this opens a dialog which allows you to **Delete** or **Remove** the attribute value.

Deleting a value means:

- The value is visible in requirements having this value, but cannot be selected.
- The value is available in all dialogs which allow filtering or searching (e.g. Quick Search).

Removing a value will completely delete it from RM's database. This means:

- The attribute in a requirement which previously used this value is empty.
- The value is no longer available in any dialog.

If you want to replace an old/obsolete value in requirement versions, see "[Changing a List Value on Existing Data](#)" on page 368.

Ordering List Attribute Values Alphabetically

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 To sort ascending, click  .
- 3 To sort descending, click  .

Ordering Values manually

- 1 Click **Advanced...** to open the **Advanced Options** dialog.
- 2 Select the value you want to move.
- 3 Click  or  .

Saving your Changes

- 4 Click **OK** to close the **Advanced Options** dialog.
- 5 Click **Save** to save all your attribute definition changes.

Changing a List Value on Existing Data

This section describes a suggested best practice for changing a list value that has been in use and thus exists in non-current requirement versions. It presupposes that you need to replace an obsolete list value in non-current versions and that an audit trail must be maintained.

- 1 Do a backup of the instance, including security.
- 2 Add the new list value to the instance schema. (Do not remove the old value.)

- 3 Ensure that you have both Update and Update Non-Current access to the class that includes the modified list.
- 4 Create a report that lists:
 - PUID
 - Object_ID
 - The relevant list field with the obsolete value
- 5 Save the report as CSV.
- 6 Edit the CSV to change the obsolete value to the new value.
- 7 Add a **Reason for change** column and populate it with whatever statement satisfies your audit requirements. (This will overwrite existing **Reason for Change** entries.)
- 8 Use CSV Import in **Update** mode to match on Object_DF and map the list and reason for change attributes.
- 9 Verify that the data was correctly imported.
- 10 Remove your Update and Update Non-Current access to the class (assuming you added these just for this procedure).
- 11 Remove the old list value from the instance schema.

Configuring a List Attribute as Check Box / Radio Button

Check boxes or radio buttons are configuration options for the list attribute. See chapter "[List Attribute](#)" on page 365 for more information on creating list attributes.

The configuration of a list attribute as check box(es) or radio buttons depends on the overall configuration of the list attribute and the options **Show as checkbox** and **Show not Initialized**. Note that **Show not Initialized** is not always available.

Configuring a Yes-No Checkbox

A Yes-No checkbox has two values and does not show any additional text apart from its attribute name.

To create a Yes-No checkbox:

- 1 Create a list attribute and specify two values in the list, e.g. *Yes* and *No*.
- 2 Select the **Show as checkbox** option.
- 3 From the **Checked value** box, select the value you want to use with the selected state of the checkbox, e.g. *Yes*. The second list value (e.g. *No*) will automatically be used for the clear state of the checkbox.
- 4 Click **OK**.

Configuring a Three-State Yes-No Checkbox

A Yes-No checkbox has two values and does not show any additional text apart from its attribute name. A three-state checkbox provides an additional state, which is **Not Initialized**.

To create a Yes-No checkbox:

- 1** Create a list attribute and specify two values in the list, e.g. *Yes* and *No*.
- 2** Select the **Show as checkbox** option.
- 3** Select the **Show not initialized** option.
- 4** From the **Checked value** box, select the value you want to use with the selected state of the checkbox, e.g. *Yes*. The second list value (e.g. *No*) will automatically be used for the clear state of the checkbox.
- 5** Click **OK**.

Configuring Multiple Checkboxes or Radio Buttons

When a list has more than 2 values, the list will show either radio buttons or several checkboxes. If the list supports only single value selection, the list will show as radio buttons. For multiple selection, the list will show checkboxes.

- 1** Create a list attribute and specify three or more values in the list.
- 2** To allow selection of more than one value, select the **Allow multiple selections** option.
- 3** Select the **Show as checkbox** option.
- 4** If desired, select the **Show not initialized** option.
- 5** Click **OK**.

Numeric Attribute

A numeric attribute accepts only numeric values, such as a reference number. The value can include a decimal point.

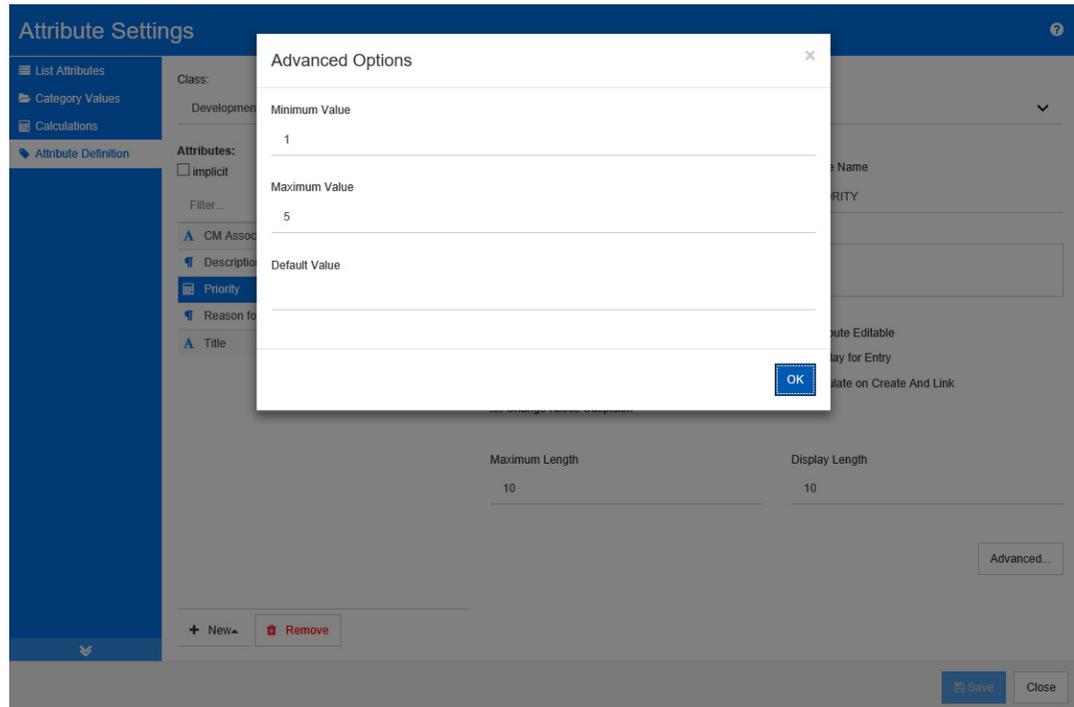


Figure 11-6. Numeric Attribute Definition

The numeric attribute properties are described in the following table.

Property	Description
Maximum Length	The maximum length of the value allowed for the attribute. The valid range is 1 to 1000 characters.
Display Length	The default number of characters to display for this attribute. The valid range is 1 to 1000 characters.
Advanced Options	
Minimum Value	A minimum value that can be associated with the attribute, if any.
Maximum Value	A maximum value that can be associated with the attribute, if any.
Default Value	A default value for initial instances of the attribute, if required.

Text Attribute

A text attribute is a text block (up to 64 Kb) that can span more than one line. It is suitable for long descriptions, such as the description of an acceptance test.

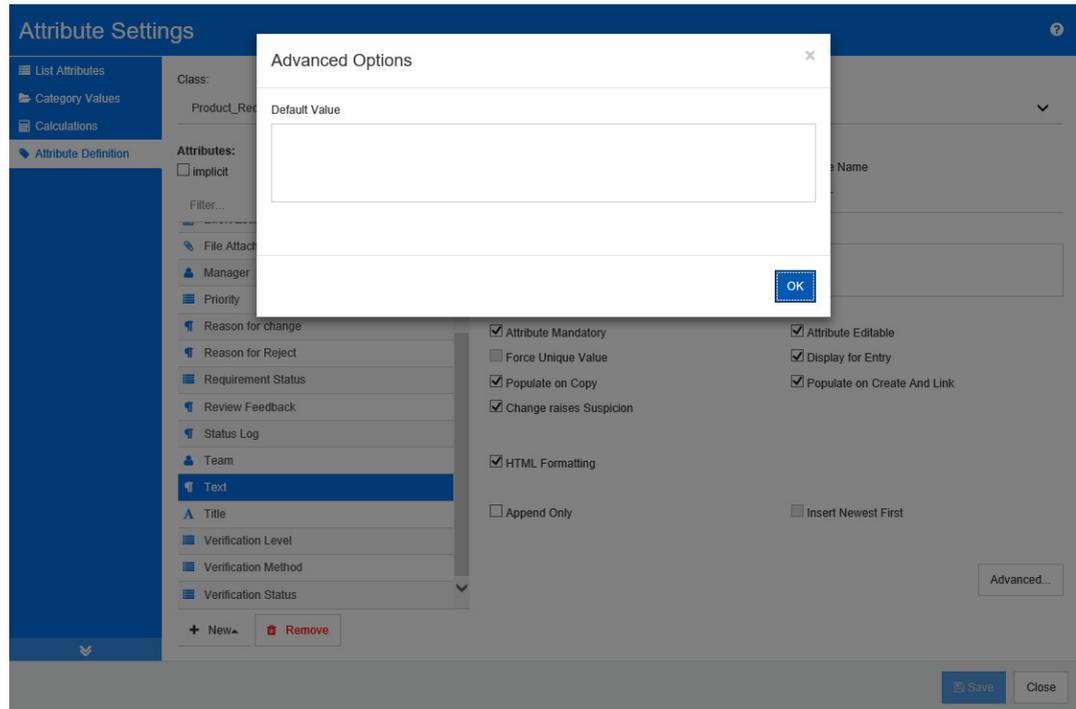


Figure 11-7. Text Attribute Definition

The text attribute properties are described in the following table.

Property	Description
HTML Formatting	A check box that allows you to specify whether this text attribute is enabled for HTML formatting. When you edit an HTML-enabled text attribute in RM Browser, a special HTML edit control is displayed in place of the normal text area. NOTE: The HTML Formatting property cannot be disabled in the Chapter class.
Append Only	If enabled, the text the user enters into the text box does not replace the current text, but added to the current text. The history is shown above the associated text box.
Insert Newest First	If enabled, new text is placed before any existing text. If disabled, new text is placed after any existing text.
Advanced Options	
Default Value	A default value for initial instances of the attribute, if required.

URL Attribute

A URL attribute can hold one or multiple URLs. Clicking the URL opens it in a new tab or window of your web browser.

The URL attribute supports the following settings:

Property	Description
Mode	<ul style="list-style-type: none"> ■ Single: The URL attribute can only hold one URL. ■ Multiple: The URL attribute can hold several URLs.
Validation pattern	<p>Specifying a validation pattern allows to ensure that URLs match a certain format. The validation pattern must be a regular expression for the JavaScript programming language. The following samples are provided in the Presets drop-down list:</p> <ul style="list-style-type: none"> ■ <code>^(http[s]? ftp):\\/(.*)</code> The URL must use either the HTTP, HTTPS or FTP protocol. ■ <code>^https:\\/\\/www\\.microfocus\\.com\\/(.*)</code> The URL must use the HTTPS protocol and the server must be <code>www.microfocus.com</code>.
Limit count to	<p>This option is only available if Mode is set to Multiple. Select this option and specify any value higher than 0 to define the maximum number of URLs the attribute can hold.</p>
Placeholder	<p>Specify a text to inform users about the expected format.</p>

User Attribute

A user attribute is a configurable attribute that provides a list of user names for user selection. It can store one single value and can be configured to list all users, all members of one or several groups or individual users.

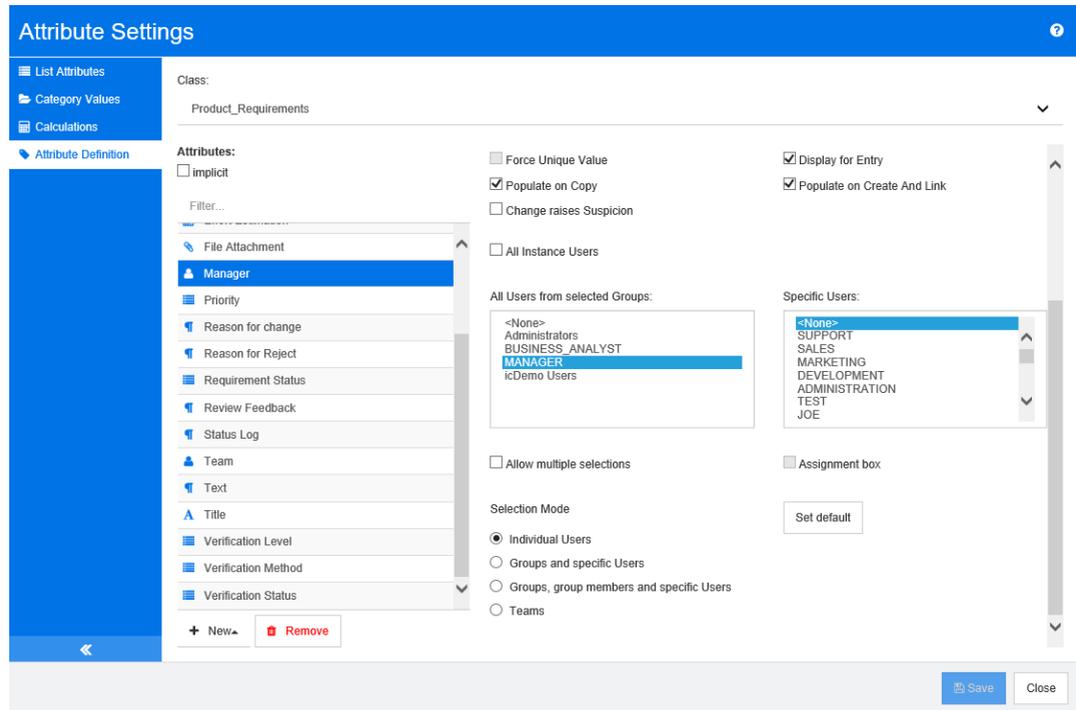


Figure 11-8. User Attribute Definition

To list all users, follow these steps:

- 1 Select option **All instance users**.
- 2 Click **OK**.

To list users of one or several groups, follow these steps:

- 1 Select option **All Users from selected Groups**.
- 2 Select the groups you want to be included in the list.
- 3 Click **OK**.

To list individual users, follow these steps:

- 1 Select option **Specific Users**.
- 2 Select the users you want to be included in the list.
- 3 Click **OK**.

Selection Mode

Property	Description
Allow multiple selections	If selected, allows multi-selection. If cleared, allows single selection.
Individual users	Only users can be selected.
Groups and specific users	Groups selected in the All users from selected groups list and users specified in the Specific users list can be selected.
Groups, group members and specific users	Groups selected in the All users from selected groups list , users who are members of the selected groups and users specified in the Specific users list can be selected.
Teams	Only teams can be selected.

Specifying Default Values

To specify a group or user as a default value, do the following:

- 1** Click the **Set Default**. This opens the **Find & Select User** dialog.
- 2** Select the user or group you want to use as a default value. The **<Current User>** entry uses the name of the user who edits the requirement as a default value.
- 3** Click **OK**. Note that the default value is not used until you save the class definition.

PUID Attribute

The PUID implicit attribute represents the PUID of a requirement. The PUID is a unique identifier that does not change. *There is no button associated with this attribute, because it is automatically included in every class.*

Figure 11-9. PUID Attribute Definition

The PUID attribute properties are described in the following table.

Property	Description
PUID format	Any string of characters and then <#>. The <#> variable is replaced by the PUID number. NOTE: If you want # to appear in the PUID as a character, type it in the string of characters without the brackets.
Number style	The style of numbering to use for the PUID.
Next	The next PUID number to be assigned.
PUID Length	The number of numbers that can replace the <#> variable.
Pad with leading zeros	Whether zeros precede the PUID to make the PUID number the number specified in the PUID Length list.



NOTE The PUID attribute properties are displayed only if the class is empty (no objects/requirements exist in the class).

Configuring Instance Settings

To open the Instance Settings dialog:

Select **Instance Settings** from the **Administration** menu. You can select **Instance Settings** only if your user account is in the Administrator group.

For information on configuring instance settings, refer to chapter "[Configuring User Settings and Instance Settings](#)" on page 74.

Configuring Agile

To allow the configuration of Agile, classes and relationships must be created by the administrator and Agile must be enabled for the instance. For further information on creating classes and relationships see chapter "[Agile](#)" in *Dimensions RM Administrator's Guide*. To enable Agile, see chapter "[Agile](#)" on page 76.



NOTE For epics, features, stories, and tasks, you can use more than one class. This allows to use different attribute sets with a product. For example, if your product is a vehicle, you might need other attributes than for a software. To use several classes with epics, features, stories, or tasks, you have to first create the classes and relationships in the class definition tool, and then configure them as described below.

To open the Agile Settings dialog:

Select **Agile Settings** from the Administration menu. You can select **Agile Settings** only if your user account is in the Administrator group.

Products

The Products mapping is a required setting.

To edit the Products mapping do the following:

- 1 Select **Agile Settings** from the Administration menu. This opens the Agile Settings dialog.
- 2 Select **Products**.
- 3 In the **Products Mapping** section, select the class you wish to use with assign to Agile's Products functionality from the **Products class** box.
- 4 In the **Choose field equivalents** section, select the attributes which should be used on Agile's Product attributes.
- 5 Click **Save**.
- 6 Click **Close**.

Releases

The Releases mapping is an optional setting. If this setting is not configured, you cannot use releases with Agile.

To edit the Releases mapping do the following:

- 1 Select **Agile Settings** from the Administration menu. This opens the Agile Settings dialog.
- 2 Select **Releases**.
- 3 In the **Releases Mapping** section, select the class you wish to use with assign to Agile's Releases functionality from the **Releases** box.
- 4 In the **Choose field equivalents** section, select the attributes which should be used on Agile's Releases attributes.
- 5 Click **Save**.
- 6 Click **Close**.

Sprints

The Sprints mapping is an optional setting. If this setting is not configured, you cannot use sprints with Agile.

To edit the Sprints mapping do the following:

- 1 Select **Agile Settings** from the Administration menu. This opens the Agile Settings dialog.
- 2 Select **Sprints**.
- 3 In the **Sprints Mapping** section, select the class you wish to use with assign to Agile's Sprints functionality from the **Sprints** box.
- 4 In the **Choose field equivalents** section, select the attributes which should be used on Agile's Sprints attributes.
- 5 Click **Save**.
- 6 Click **Close**.

Epics

The Epics mapping is an optional setting. If this setting is not configured, you cannot use epics with Agile.

To edit the Epics mapping do the following:

- 1 Select **Agile Settings** from the Administration menu. This opens the Agile Settings dialog.
- 2 Select **Epics**.
- 3 In the **Epics Mapping** section, select the class you wish to use with assign to Agile's Epics functionality from the **Epics** box.

- 4 In the **Choose field equivalents** section, select the attributes which should be used on Agile's Epics attributes.
- 5 Click **Save**.
- 6 Click **Close**.

Features

The Features mapping is an optional setting. If this setting is not configured, you cannot use features with Agile.

To edit the Features mapping do the following:

- 1 Select **Agile Settings** from the Administration menu. This opens the Agile Settings dialog.
- 2 Select **Features**.
- 3 In the **Features Mapping** section, select the class you wish to use with assign to Agile's Features functionality from the **Features** box.
- 4 In the **Choose field equivalents** section, select the attributes which should be used on Agile's Features attributes.
- 5 Click **Save**.
- 6 Click **Close**.

Stories

The Stories mapping is an optional setting. If this setting is not configured, you cannot use features with Agile.

To edit the Stories mapping do the following:

- 1 Select **Agile Settings** from the Administration menu. This opens the Agile Settings dialog.
- 2 Select **Stories**.
- 3 In the **Stories Mapping** section, select the class you wish to use with assign to Agile's Stories functionality from the **Stories** box.
- 4 In the **Choose field equivalents** section, select the attributes which should be used on Agile's Stories attributes.
- 5 Click **Save**.
- 6 Click **Close**.

Clearing Agile Mappings

To clear one Agile mapping, do the following:

- 1 Select **Agile Settings** from the Administration menu. This opens the Agile Settings dialog.

- 2 Click .
- 3 Confirm the following message by clicking **Reset**.

To clear all Agile mappings, do the following:

- 1 Select **Agile Settings** from the Administration menu. This opens the Agile Settings dialog.
- 2 Click **Reset**.
- 3 Confirm the following message by clicking **Reset**.

Chapter 12

Script Syntax

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Overview

Scripts contain commands for extracting data from the Dimensions RM database and for formatting the results. This appendix describes the syntax of the Dimensions RM script language. If you are familiar with SQL, you will note the similarity between that standard language and the variant of it that has been tailored specifically for Dimensions RM.



IMPORTANT! The Dimensions RM scripting language is **NOT** SQL. Though *similar* to SQL, it is in fact unique to Dimensions RM. Please read this chapter to understand its usage.

The RM scripting language:

- Is an interpreted language. This helps to prevent SQL injection attacks.
- Uses a database meta model so class names are *not* real database table names.



NOTE This section describes the full language and identifies the script generator limitations. In many cases, scripts work equally well interactively and from the command line with `doc_out`. There are some cases, however, such as with variables and prompts, in which a script can only be used in one context. For example, scripts that reference variables cannot be used interactively; scripts that use prompts cannot be used from the command line.

A Dimensions RM reporting script contains commands that tell Dimensions RM what data to extract from the instance and how to format it. The following types of commands can be included in a script:

- **SELECT** defines the data (object attributes) to be extracted.
- **CALCULATE** performs computations based on the extracted data.
- **XREF** controls cross references that follow links between objects.
- **PLUS** concatenates **SELECT** statements.
- **COMMENT** provides descriptive information that is not interpreted by Dimensions RM.



NOTE You cannot save a script unless you have the "Create" permission for scripts

SELECT Statement

For those familiar with SQL (Structured Query Language), the **SELECT** statement in a script appears similar in many ways to the SQL **SELECT** statement.

A **SELECT** statement may contain the following elements (mandatory elements are indicated in bold print):

- The reserved word **SELECT**
- A list of display elements (attributes) each preceded by a `<DTPtag>`. The `DTPtag` specifies a column heading for tabular displays or, when the script results are saved in a formatted file, a paragraph style or format for desktop publishing tools. At least one

attribute must be selected. If you do not want a column header or a paragraph style, you must indicate that with empty delimiters, as in <>.

- The reserved word FROM
- The RM class name
- The reserved word WHERE
- Conditions under which to make the extraction
- The reserved words ORDER BY
- A list of fields by which to order extraction
- Metrics computations to be performed

Note the format of this statement – SELECT <>'attribute' FROM 'class'. The display attributes must be preceded by the characters '<' and '>'. If these characters are not present, the attribute is not included in the report document.

A SELECT statement may contain as many display elements as required, but each element must be defined as an attribute of the given class.

For example:

```
SELECT <>TEST_ID <>TEST_DESCRIPTION <>TEST_NOTES <>REQUIRED_RESULT
FROM TEST
```

This SELECT statement produces a list of all the objects of class TEST in the Dimensions RM database, in Dimensions RM key order. The test identifier, description, notes, and required result attributes appear in the output in the same order as they appear in the display list.

```
SELECT <Requirement ID>REQ_ID <Status> STATUS <Text>Text FROM
CustomerRequirements WHERE STATUS != 'Deleted' ORDER BY STATUS
```

This select statement produces a list of all objects in class CustomerRequirements that have not been deleted. The list is intended for tabular output on the screen or in a CSV file, so the column headings are included. The result will be ordered by the STATUS attribute value in alphabetical order.

DTPtag

You can specify a DTPtag for each attribute in your report to control output formatting. For tabular output, the DTPtag is used as a column heading. For document format, such as RTF, the DTPtag is used to identify a paragraph style to be associated with the attribute value. The tag name is placed between the < and > characters that precede a display list element. The tag name may be up to 19 characters in length.

The tag name can only include the '#' character if it is preceded by a backslash (\).

When used with a table, the tag name appears as the column heading, with a column width determined by Dimensions RM. You can specify the column width by preceding the tag with '!n', where n is the desired column width in characters. Column widths are not supported in the script generator wizard.

For example (DTPtags are shown in **bold**):

```
SELECT !8<Test ID>TEST_ID !25<Description>TEST_DESCRIPTION
!25<Test Notes>TEST_NOTES !25<Results>REQUIRED_RESULT FROM TEST
```

DTP_TEXT Display Item

Dimensions RM supports a display list element, called DTP_TEXT, which does not correspond to an attribute. For tabular output, DTP_TEXT can be used to insert a blank column into the output. For document output, its purpose is to insert a "blank" component tag (that is, a DTP tag with no text or data attached). This enables the inclusion into documents of headers and footers, and repeated text strings.

As many DTP_TEXT items as desired may be included in the display list, and their position within the display list is significant.

For example, to separate each TEST record in a list with a marker (for example, a separator line):

```
SELECT <Test ID>TEST_ID <Description>TEST_DESCRIPTION <Test
Notes>TEST_NOTES <Result>REQUIRED_RESULT <separator>DTP_TEXT FROM
TEST
```

Within RM Word, the tag separator must be defined to produce a paragraph of the required type, for example, a line of hyphens or asterisks.

RTM_KEYWORD Display Item

Dimensions RM supports another display list item that does not correspond to an attribute. Use RTM_KEYWORD to request Dimensions RM to return a list of linked collections for each object. For example:

```
SELECT <Test ID>TEST_ID <Description>TEST_DESCRIPTION <Test
Notes>TEST_NOTES <Result>REQUIRED_RESULT
<Linked Collections>RTM_KEYWORD FROM TEST
```

WHERE Clause

For many reporting purposes, only a subset of the objects in a class is required. The WHERE reserved word is used in conjunction with a SELECT statement to specify selection constraints in terms of attribute values, collection membership, or relationship linkages. The WHERE clause syntax is of the general form:

WHERE ConditionalExpression

where ConditionalExpression is a logical expression whose elements are of the form:

- AttributeName Operator Valuelist
- Direction Relationship
- Group {in | not in} (collectionList)
- SpecialConstraint

The elements of a conditional expression are combined using the logical operators AND and OR. Any number of conditions may be applied to a SELECT statement which can be combined using the reserved words AND and OR. Both AND and OR have the same precedence and are left associative. Parentheses may be used to change the precedence.

The following table describes attribute types used in Dimensions RM instance schemas and their allowed operators.

Attribute Type	Operators	Notes
Alphanumeric	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter "Comparing Text" on page 386.
Date	INITIALIZED, NOT INITIALIZED, =, !=, <, >, <=, >=	For further information, see chapter "Comparing Dates" on page 388.
File Attachment		Not supported
Group	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter "Comparing Text" on page 386.
List	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter "Comparing Text" on page 386.
Numeric	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter "Comparing Numbers" on page 386.
Text	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter "Comparing Text" on page 386.

Comparing Numbers

Operator	Description
INITIALIZED	The attribute contains a value. Example: TEST_ATTRIBUTE INITIALIZED
NOT INITIALIZED	The attribute contains no value. Example: TEST_ATTRIBUTE NOT INITIALIZED
=	The attribute value must be identical with the specified value. Example: TEST_ATTRIBUTE = 5
!=	The attribute value must not be identical with the specified value. Example: TEST_ATTRIBUTE != 5
<	The attribute value must be less than the specified value. Example: TEST_ATTRIBUTE < 5
>	The attribute value must be larger than the specified value. Example: TEST_ATTRIBUTE > 5
<=	The attribute value must be less or identical with the specified value. Example: TEST_ATTRIBUTE <= 5
>=	The attribute value must be larger or identical with the specified value. Example: TEST_ATTRIBUTE >= 5
IN	The attribute value must be identical to one of those provided Example: TEST_ATTRIBUTE IN (3, 4, 5)
NOT IN	The attribute value must not be identical to one of those provided Example: TEST_ATTRIBUTE NOT IN (3, 4, 5)

Comparing Text

When comparing text, the casing of a word is very important. This is because for a computer, a text is represented by numbers. All capital letters have a lower value than lowercase letters, i.e. "A" has the value of 65, while "a" has the value of 97. For the following table (except for operators INITIALIZED and NOT INITIALIZED), it is assumed that there are two requirements, REQ1 and REQ2. For REQ1, the attribute TEST_ATTRIBUTE has the value "Test". For REQ2, the attribute TEST_ATTRIBUTE has the value "test".

Operator	Description
INITIALIZED	The attribute contains a value. Example: TEST_ATTRIBUTE INITIALIZED
NOT INITIALIZED	The attribute contains no value. Example: TEST_ATTRIBUTE NOT INITIALIZED
=	The attribute value must be identical with the specified value. Example: TEST_ATTRIBUTE = 'Test' The example returns REQ1.

Operator	Description
!=	The attribute value must not be identical with the specified value. Example: TEST_ATTRIBUTE != 'Test' The example returns REQ2.
<	The attribute value must be less than the specified value. Example: TEST_ATTRIBUTE < 'test' The example returns REQ1.
>	The attribute value must be larger than the specified value. Example: TEST_ATTRIBUTE > 'Test' The example returns REQ2.
<=	The attribute value must be less or identical with the specified value. Example: TEST_ATTRIBUTE <= 'test' The example returns REQ1 and REQ2.
>=	The attribute value must be larger or identical with the specified value. Example: TEST_ATTRIBUTE >= 'Test' The example returns REQ1 and REQ2.
IN	The attribute value must be identical to one of those provided Example: TEST_ATTRIBUTE IN ('Test', 'test') The example returns REQ1 and REQ2.
NOT IN	The attribute value must not be identical to one of those provided Example: TEST_ATTRIBUTE NOT IN ('Test', 'test') The example returns no requirements

Operator	Description
LIKE	<p>The attribute value must match the specified search pattern. Note that the text casing is relevant.</p> <p>Examples:</p> <ul style="list-style-type: none"> ■ TEST_ATTRIBUTE LIKE 'Business*' <p>The value must start with the word "Business".</p> ■ TEST_ATTRIBUTE LIKE '*business.' <p>The value must end with "business.".</p> ■ TEST_ATTRIBUTE LIKE ~'*business*' <p>The value must contain the word "business".</p> <p>* or %: A wildcard for any set of characters. _: A wildcard for a single character.</p>
NOT LIKE	<p>The attribute value must not match the specified search pattern. Note that the text casing is relevant.</p> <p>Examples:</p> <ul style="list-style-type: none"> ■ TEST_ATTRIBUTE NOT LIKE 'Business*' <p>The value must not start with the word "Business".</p> ■ TEST_ATTRIBUTE NOT LIKE '* business.' <p>The value must not end with "business.".</p> ■ TEST_ATTRIBUTE NOT LIKE ~'*business*' <p>The value must not contain the word "business".</p> <p>* or %: A wildcard character for any set of characters. _: A wildcard character for a single character.</p>

Comparing Dates

The syntax for comparing dates is similar to the syntax of comparing strings. However, important for comparing dates is that the query format matches the format of the attribute. When starting a new script, you might prefer selecting dates through the wizard.

Operator	Description
INITIALIZED	<p>The attribute contains a value.</p> <p>Example: TEST_ATTRIBUTE INITIALIZED</p>
NOT INITIALIZED	<p>The attribute contains no value.</p> <p>Example: TEST_ATTRIBUTE NOT INITIALIZED</p>
=	<p>The attribute value must be identical with the specified value.</p> <p>Examples:</p> <ul style="list-style-type: none"> ■ TEST_ATTRIBUTE = '01-SEP-2015' ■ TEST_ATTRIBUTE = '01-SEP-2015@01:02:03'

Operator	Description
!=	<p>The attribute value must not be identical with the specified value.</p> <p>Examples:</p> <ul style="list-style-type: none"> ■ TEST_ATTRIBUTE != '01-SEP-2015' Any date which is not September 1st, 2015 matches this criterion, e.g. August 30th, 2015; December 31st, 2014 or September 2nd, 2015. ■ TEST_ATTRIBUTE != '01-SEP-2015@01:02:03' Any which is not September 1st, 2015 at 01:02:03 matches this criterion, e.g. August 30th, 2015 at 12:05:45; September 1st, 2015 at 01:02:02 or September 2nd, 2015 at 02:03:04.
<	<p>The attribute value must be less than the specified value.</p> <p>Examples:</p> <ul style="list-style-type: none"> ■ TEST_ATTRIBUTE < '01-SEP-2015' Any date before September 1st, 2015 matches this criterion, e.g. August 30th, 2015 or December 31st, 2014. ■ TEST_ATTRIBUTE < '01-SEP-2015@01:02:03' Any date before September 1st, 2015 at 01:02:03 matches this criterion, e.g. August 30th, 2015 at 12:05:45 or September 1st, 2015 at 01:02:02.
>	<p>The attribute value must be larger than the specified value.</p> <p>Examples:</p> <ul style="list-style-type: none"> ■ TEST_ATTRIBUTE > '01-SEP-2015' Any date after September 1st, 2015 matches this criterion, e.g. September 2nd, 2015 or January 1st, 2016. ■ TEST_ATTRIBUTE > '01-SEP-2015@01:02:03' Any date after September 1st, 2015 at 01:02:03 matches this criterion, e.g. September 2nd, 2015 at 12:05:45 or September 1st, 2015 at 01:02:04.
<=	<p>The attribute value must be less or identical with the specified value.</p> <p>Examples:</p> <ul style="list-style-type: none"> ■ TEST_ATTRIBUTE <= '01-SEP-2015' The date must be September 1st, 2015 or before to match this criterion, e.g. August 30th, 2015 or December 31st, 2014. ■ TEST_ATTRIBUTE <= '01-SEP-2015@01:02:03' The date must be September 1st, 2015 at 01:02:03 or before to match this criterion, e.g. August 30th, 2015 at 12:05:45 or September 1st, 2015 at 01:02:02.

Operator	Description
>=	<p>The attribute value must be larger or identical with the specified value.</p> <p>Examples:</p> <ul style="list-style-type: none"> TEST_ATTRIBUTE > '01-SEP-2015' The date must be September 1st, 2015 or after to match this criterion, e.g. September 2nd, 2015 or January 1st, 2016. TEST_ATTRIBUTE > '01-SEP-2015@01:02:03' The date must be September 1st, 2015 at 01:02:03 or after to match this criterion, e.g. September 2nd, 2015 at 12:05:45 or September 1st, 2015 at 01:02:04.
LIKE	<p>The attribute value must match the specified search pattern.</p> <p>Examples:</p> <ul style="list-style-type: none"> TEST_ATTRIBUTE LIKE ~'17-*'-2015' The date must be 17th of any month in 2015. TEST_ATTRIBUTE LIKE ~'*-SEP-2015' The date must be any day in September 2015. TEST_ATTRIBUTE LIKE ~'*-SEP-%' The date must be any day in September of any year. TEST_ATTRIBUTE LIKE '01-SEP-2015@*' The date must be September 1st, 2015; the time is irrelevant. <p>* or %: A wildcard character for any set of characters. _: A wildcard character for a single character.</p>
NOT LIKE	<p>The attribute value must not match the specified search pattern.</p> <p>Examples:</p> <ul style="list-style-type: none"> TEST_ATTRIBUTE NOT LIKE ~'17-*'-2015' The date must not be 17th of any month in 2015. TEST_ATTRIBUTE NOT LIKE ~'*-SEP-2015' The date must not be any day in September 2015. TEST_ATTRIBUTE NOT LIKE ~'*-SEP-*' The date must not be any day in September of any year. TEST_ATTRIBUTE NOT LIKE '01-SEP-2015@%' The date must not be September 1st, 2015. <p>* or %: A wildcard character for any set of characters. _: A wildcard character for a single character.</p>

Direction Relationship

This constraint form is used to identify linked objects within a particular relationship. For example, given a relationship between classes SystemRequirement (the primary class) and Test (the secondary class), you could search for system requirement objects that are linked to test objects. Alternatively, finding those that are not linked can help you identify work that is yet to be completed. The following “directions” are defined:

- PRIMARY_IN

- NOT_PRIMARY_IN
- SECONDARY_IN
- NOT_SECONDARY_IN

These operators are used to extract only those objects which have links (or not) in a named relationship, and can therefore be used to create 'compliance' lists (such as a list of tests which have or have not been linked to requirements)

Following are Direction Relationship examples (based on a relationship named Tested_By with SystemRequirements as the primary and Test as the secondary class).

- PRIMARY_IN Tested_By
Finds SystemRequirements that are linked to at least one Test object.
- NOT_SECONDARY_IN Tested_By
Finds Test objects that are not associated with any SystemRequirement objects

For SELECT statements involving requirements, there are two pre-defined relationships that may also be used. These are SOURCE and IMMEDIATE. The effect of using each of the relationship operators with each of the SOURCE and IMMEDIATE relationships is described in the following table.

Operator	IMMEDIATE	SOURCE
PRIMARY_IN	Requirements that have children (not the lowest level requirements)	Requirements that have no parents (the source requirements)
SECONDARY_IN	Requirements that have parents (derived requirements)	Requirements that have no children (the lowest level requirements)
NOT_PRIMARY_IN	Requirements that have no children (the lowest level requirements)	Requirements that have parents (derived requirements)
NOT_SECONDARY_IN	Requirements that have no parents (the source requirements)	Requirements that have children (not the lowest level requirements)

Group {in | not in} (collectionList)

This constraint form is used to identify objects with respect to their linkage to one or more collections. For example, you can define collections to help you manage prioritization. A parent collection, named Priorities could have child collections named Priority 1, Priority 2, and so on. You can use these collections to organize reports focused on specific priorities or to find items that have yet to be prioritized:

Following are collection constraint examples.

- GROUP IN ('Priority 1', 'Priority 2')
Finds objects linked to either Priority 1 or Priority 2 collections.
- GROUP NOT IN ('Priorities')
Finds objects not yet prioritized.

SpecialConstraint

This constraint form supports built-in attributes of classes based on the requirement class type. These classes include built-in text attributes named Query and Clarification, which are intended for use with questions and answers to do with the requirement itself. The SpecialConstraint keywords listed below take no additional operands:

- `HAVING_CLARIFICATION_TEXT`
- `HAVING_NO_CLARIFICATION_TEXT`
- `HAVING_QUERY_TEXT`
- `HAVING_NO_QUERY_TEXT`

Following is a SpecialConstraint example:

- `SELECT <Requirement ID>REQ_ID <Status> STATUS <Text>Text FROM CustomerRequirements WHERE HAVING_QUERY_TEXT`

Finds identifier, status, and text from objects of class CustomerRequirements with non-empty Query attribute.

Variables

Variables can be used when running scripts from the command line, using `doc_out`, to allow the same script to be used for different values. Variables are not supported in the script generator wizard except when used in conjunction with prompting (see ["Prompting" on page 392](#)).

For example:

```
SELECT <>TEXT FROM REQS WHERE REQUIREMENT_KEY = REQ_KEY_VALUE
```

The value of `REQ_KEY_VALUE` may be supplied from the command line for each execution of the script. The name of the variable must be given in upper case.

Prompting

Scripts can also contain specially formatted prompts that will be displayed when the script is run interactively to prompt users for information. The syntax for prompting in scripts is:

```
<#prompt#> anywhere in the script. For example: select <id>object_id from ECP where object_id = '<#enter id#>'
```

This prompting syntax also allows for prompted values to be used as variables in multiple places within a script. For example:

- `select <id>object_id from CR where object_id='<#enter id^var1#>'`
`xref`
- `select <id>object_id from SR where object_id='<#^var1#>'`

The value entered by the user for the object ID of the CR class will also be used in the where clause of the SR class select. The `^` indicates that the value should be stored in the variable following the `^` and that variable name can be used without a prompt elsewhere. If a second prompt `^` variable name is found with the same variable name, the variable's value will be changed.

ORDER BY Clause

The ORDER BY clause can be added to the SELECT statement to specify the order in which the records should be returned. The ORDER BY clause is added after the WHERE clause or after the class name if no WHERE clause is included. The reserved words ORDER BY must be followed by a comma separated list of attributes. Any number of attributes of a class can be used to qualify the order of extraction.

Sorting in Ascending Order

By default, the ORDER BY clause sorts in ascending order.

Examples:

- ```
SELECT <>TEST_SETUP FROM TEST
ORDER BY TEST_ID, TEST_DATE
```
- ```
SELECT <>TEST_SETUP FROM TEST
WHERE TEST_ID = '7'
ORDER BY TEST_DATE, REQUIRED_RESULT
```



NOTE When the ORDER BY attribute has a NULL value, it is placed at the end of the list (that is, it is considered to have the highest value).

Sorting in Descending Order

To sort in descending order, append **|DESC|** to the attribute name.

Examples:

- ```
SELECT <>TEST_SETUP FROM TEST
ORDER BY TEST_ID|DESC|, TEST_DATE|DESC|
```
- ```
SELECT <>TEST_SETUP FROM TEST
WHERE TEST_ID = '7'
ORDER BY TEST_DATE|DESC|, REQUIRED_RESULT|DESC|
```



NOTE When the ORDER BY attribute has a NULL value, it is placed at the top of the list (that is, it is considered to have the highest value).

Sorting Dewey Decimal Formatted Values

It is common for reports to be ordered by attributes that have a Dewey decimal format (e.g. 1.2.3.12). Often the PARAGRAPH_ID attribute will have this kind of format. A straightforward ASCII sort on these codes will not return a correct order, since it is performed on a character-by-character basis, rather than by the numbering.

A Dewey decimal code needs to have letters (upper or lower case) and numbers separated by a decimal point or a hyphen. The following examples are legal Dewey decimal codes:

- 1.2.5

- a.b
- 3
- d
- d-1-2

There is no restriction on the length of the code.

To perform a Dewey decimal ordering, precede the appropriate attribute with the @ symbol.

Example:

```
SELECT <PUID>PUID <Title>TITLE <Paragraph ID>PARAGRAPH_ID FROM REQ  
ORDER BY @PARAGRAPH_ID
```

Descending sorting can also be used for attributes which contain dewey decimal formatted values by adding **|DESC|**.

CALCULATE Statement

Metrics can be performed upon select statements in scripts run from doc_out. The available calculations are as follows:

- A **count** of records selected on any field
- The **total** of the values of records selected on numeric fields
- The **average** value of records selected on numeric fields
- The **minimum** value selected on numeric fields
- The **maximum** value selected on numeric fields
- **Normalization** of values selected by a simple arithmetic expression

The results of the count, total, average, minimum and maximum metrics are displayed at the bottom of the report. Normalization causes each record value in the body of the report to be changed according to the arithmetic expression.

NULL fields are handled in two ways:

- If only records with values in them are to be used (POPULATED), the NULL fields are ignored (this is the default)
- If all records are to be used regardless of their content (ALL), NULL fields are treated as having the value 0 (zero).

The format of the CALCULATE statement is as follows:

- The CALCULATE keyword appears first to indicate that metrics will be performed.
- A list of calculation types (COUNT, TOTAL, AVERAGE, MINIMIZE, MAXIMIZE or NORMALIZE) and the fields applicable (the fields should be separated by commas).
- Each calculation type keyword can be prefixed by an ALL or POPULATED flag. If none is supplied, the default of POPULATED is used.

For TOTAL, COUNT, AVERAGE, MINIMUM and MAXIMUM:

- The field name should be prefixed by a mandatory "tag" in the format [string] which defines a string to be used in the report to identify that particular value. Note that [] is valid.
- Each separate [tag] field entry in the list may be prefixed by the ALL or POPULATED flag.

For normalization:

- Each entry has the form "fieldname operator value", where operator is any of '+', '-', '*', '/' and value is a real or integer number. No tags are applicable for normalization.
- Each separate [tag] field entry in the list may be prefixed by the ALL or POPULATED flag.

For example:

```
SELECT <number>PARTS_AVAILABLE FROM REQ
CALCULATE COUNT [count]PARTS_AVAILABLE
TOTAL [total]PARTS_AVAILABLE
AVERAGE [average]PARTS_AVAILABLE
MINIMIZE [min]PARTS_AVAILABLE
MAXIMIZE [max]PARTS_AVAILABLE
```

To modify the values of the attribute PARTS_AVAILABLE in the report, you can use the NORMALIZE metric:

```
SELECT <id>REQUIREMENT_KEY <number>PARTS_AVAILABLE FROM REQ CALCULATE
NORMALIZE ALL PARTS_AVAILABLE + 5
```

XREF Statement

The XREF statement lets you show the linkage or traceability between objects. XREF links the SELECT statement, immediately following it with a previous SELECT statement.

The XREF statement must contain the reserved word XREF and the name of the relationship that defines the traceability. It may also contain the reserved words PRIMARY, SECONDARY, PRIMARY_HISTORY, SECONDARY_HISTORY and either FIRST, SECOND, THIRD, FOURTH, or a number.

If both SELECT statements select from the same class, then the XREF statement must be modified with either the PRIMARY or SECONDARY reserved words. Use PRIMARY if the second SELECT statement refers to the primary side of the relationship. Use SECONDARY if the second SELECT statement refers to the secondary side of the relationship.



NOTE The script generator wizard does not support the reserved words PRIMARY_HISTORY, SECONDARY_HISTORY, FIRST, SECOND, THIRD, and FOURTH, and the use of a number to refer to SELECT statements.

The XREF statement must appear between two SELECT statements, the latter of which must be for a class defined to be a member of the relationship named in the XREF statement. Also required is that at least one of the SELECT statements preceding the XREF statement must concern the other class named in the relationship.

For example, suppose a relationship has been defined called REQ_TEST that links the REQ class of type requirement (as the PRIMARY object in the relationship) to a class called TEST (the SECONDARY object), and traceability links have been created between objects in the classes. A list of requirements showing their related TESTs can be created using:

```
SELECT <ID>REQ_ID <>TEXT FROM REQ WHERE STATUS='CURRENT'  
XREF REQ_TEST  
SELECT <TEST ID>TEST_ID <>TEST_DESCRIPTION FROM TEST
```

This script produces a list of every requirement from the REQ class where the STATUS attribute has the value "Current", and if a requirement participates in the relationship REQ_TEST, its corresponding TESTs are extracted. Note that this form of the script extracts each of the requirements that match the condition, then the TESTs that are linked to them. If the condition was such that more than one requirement complied, and a TEST is linked to more than one requirement, it may appear more than once in the output.

To list only those requirements that are related to TESTs, append a condition as follows:

```
SELECT <ID>REQ_ID <>TEXT FROM REQ WHERE STATUS='CURRENT'  
AND PRIMARY_IN REQ_TEST  
XREF REQ_TEST  
SELECT <TEST ID>TEST_ID <>TEST_DESCRIPTION FROM TEST
```

The PRIMARY_IN operator has been used since REQ was defined as primary in the REQ_TEST relationship.

Using the NOT_PRIMARY_IN operator:

```
SELECT <ID>REQ_ID <>TEXT FROM REQ WHERE STATUS='CURRENT'  
AND NOT PRIMARY_IN REQ_TEST  
XREF REQ_TEST  
SELECT <TEST ID>TEST_ID <>TEST_DESCRIPTION FROM TEST
```

This produces a list containing only requirements, since any requirement not related to any TESTs, by definition will not cause any TESTs to be extracted.

The following script poses a problem:

```
SELECT <original>REQ_ID FROM REQ XREF REQ_TEST SELECT  
<test>TEST_DESCRIPTION FROM TEST XREF SOURCE SECONDARY SELECT <low  
child>REQUIREMENT_KEY FROM REQ XREF REQ_EVENT SELECT  
<events>EVENT_TEXT FROM EVENT
```

It is valid (providing the objects, attributes, and relationships have been defined), but the third XREF statement (XREF REQ_EVENT) implies the class named in the next SELECT statement (EVENT) must be linked in the relationship REQ_EVENT. Since the relationship links REQs to EVENTS and the next class is EVENT, they must be linked to REQs in a previous SELECT statement.

The script contains two instances of REQ in SELECT statements (SELECT statements 1 and 3). **By default, the first SELECT statement for a matching class is used.** So in the example the EVENTS are those linked to the first set of REQs (the original requirements).

There are four reserved words that allow you to choose where the linkage must exist in the event of duplicity of objects in the script:

- FIRST
- SECOND
- THIRD

- FOURTH



NOTE These reserved words are for compatibility with earlier versions of RM, but they are not supported in the script generator wizard.

The reserved words express the number of the SELECT statement to which the next SELECT statement is linked. One of these reserved words may appear as the final word in an XREF statement. It may be necessary to refer to a SELECT statement later in the script than the fourth one. This can be specified using a positive integer.

To change the previous script so that the EVENTS linked to the source REQUIREMENTS are displayed, append the reserved word THIRD or the number 3 to the final XREF statement.

```
SELECT <original>REQUIREMENT_KEY FROM REQ XREF REQ_TEST SELECT
<test>TEST_DESCRIPTION FROM TEST XREF SOURCE SECONDARY SELECT <low
child>REQUIREMENT_KEY FROM REQ XREF REQ_EVENT THIRD SELECT
<events>EVENT_TEXT FROM EVENT
```

The final XREF statement now means the class named in the next SELECT statement (EVENT) must be linked in the relationship REQ_EVENT to the objects extracted by the third SELECT statement. Since the relationship REQ_EVENT links REQs to EVENTS and both are represented in the SELECT statements, this is a valid script and produces the desired output.

PLUS Statement

The PLUS statement can be used to join multiple scripts into one script. The outcome of the extraction using the resultant script is multiple reports produced in one data extraction run.

For example:

```
SELECT <4.1_Title>DTP_TEXT <>TEXT FROM REQ WHERE
PRIMARY_IN IS_ALLOCATED TO HARDWARE
PLUS SELECT <4.2_Title>DTP_TEXT <>TEXT FROM REQ WHERE
PRIMARY_IN IS_ALLOCATED TO SOFTWARE
PLUS SELECT <4.3_Title>DTP_TEXT <>TEXT FROM REQ WHERE
PRIMARY_IN IS_ALLOCATED TO MANUAL_OPERATION
```

COMMENT Statement

You can use comments to provide documentation within scripts to be used from the command line. The script generator wizard does not support comments. Comments can be inserted into a script in several formats:

- Characters after ##, -- or \$! are ignored until the start of a new line.
- Multiple line comments can be enclosed within pairs of comment delimiters {}, /* */ or (* *).

For example:

```
/* Version 1.0
   Date: 14th May 2006*/
SELECT <key>REQUIREMENT_KEY ## extract RMs no.
FROM REQ-- for the req class
WHERE SOURCE_REQUIREMENTS = 'Y'#! of all original requirements
{Now find all derived requirements}
XREF SOURCE SECONDARY
(* and extract the RM nos *)
SELECT REQUIREMENT_KEY FROM REQ
```

Adding Rich Format Text to Query Prompts

Using Rich Text in a query prompt can provide extra information to the user. For example, the following is a standard query prompting for a Marketing Requirement ID:

The screenshot shows a web application interface with a blue header bar containing 'DRM DIMENSIONS RM', navigation links, and a user profile 'Welcome, Joseph Wilson'. Below the header is a breadcrumb trail: 'RMDEMO > RMDEMO > Marketing_Requirements > Selected Requirements'. The main content area is titled 'Selected Requirements' and contains the following text: 'The following parameters must be provided to run this report. Please provide a value for each of the parameters below.' Below this is a text input field with the label 'Enter Rqmt ID for MARKETING_REQUIREMENTS:'. At the bottom right of the form are a blue 'Run Report' button and a checkbox labeled 'Remember these parameters'.

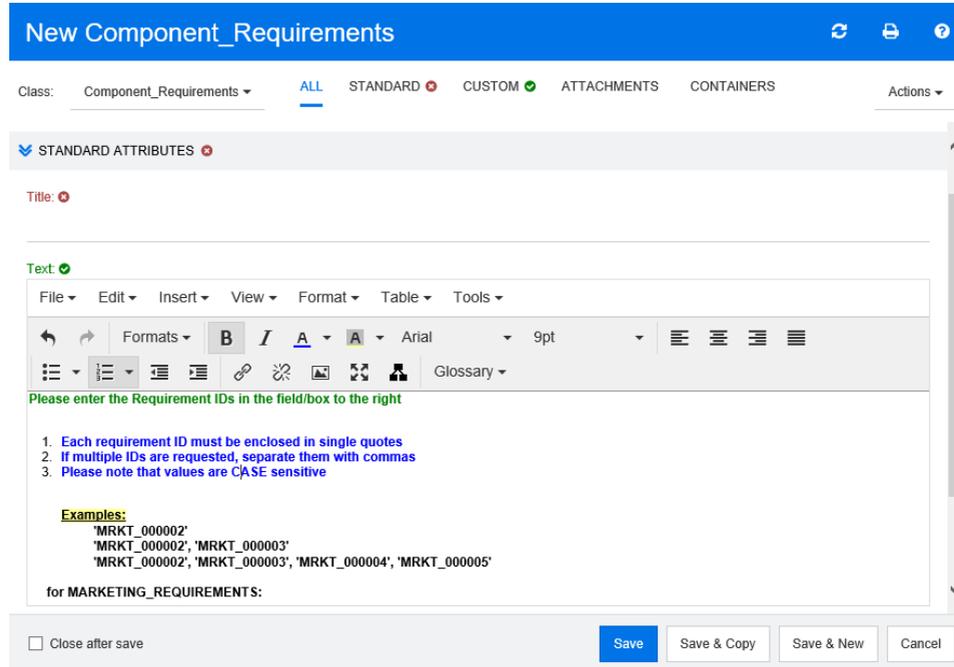
This is the layout we want to achieve:

The screenshot shows the same web application interface as above, but with rich text added to the prompt. The text in the main content area is: 'The following parameters must be provided to run this report. Please provide a value for each of the parameters below.' This is followed by green text: 'Please enter the Requirement IDs in the field box to the right'. Below this are three numbered instructions: '1. Each requirement ID must be enclosed in single quotes', '2. If multiple IDs are requested, separate them with commas', and '3. Please note that values are CASE sensitive'. An 'Examples:' section follows, listing several requirement IDs in single quotes, some with commas. Below the examples is the text 'for MARKETING_REQUIREMENTS:' and the input field. At the bottom right are the 'Run Report' button and the 'Remember these parameters' checkbox.

The following steps describe how to modify a query prompt to provide this extra information:

- 1 Select **Class Report** from the **New** menu.
- 2 Select the desired class ("Marketing Requirements" in this example).
- 3 Specify a query name.
- 4 Select the **Script** radio button.
- 5 Select the **Attribute Constraints** tab.
- 6 Click on the arrow for the **Rqmt ID** field and select **Enter at runtime**.
- 7 In the main window, select **Requirement** from the **New** menu.
- 8 Select a class with an HTML enabled attribute and click into such an attribute.
- 9 Enter the text you want to use with the query prompt.

- 10** From the **Tools** menu, select **Source code** to get the raw HTML code. Select all then copy this text/html.



- 11** Close the *HTML Source Editor* window and the *New Marketing_Requirements* window.
- 12** In the *Query By Class: Marketing_Requirements* window, click on the **View Script** button which is located at the left window corner at the bottom. The script looks like this:

```
select <Rqmt ID>PUID <Title>TITLE from Marketing_Requirements where PUID LIKE ~'<#Enter Rqmt ID#>' and STATUS IN ('Current') order by PUID calculate all count[Row Count:]PUID
```

- 13** Locate the prompt '<#Enter Rqmt ID#>' and delete the text between the two "#" characters so that only '<##>' remains.
- 14** Put the cursor between the two "#" characters and press the "Enter" key twice. Your script should look like this:

```
Script: select <Rqmt ID>PUID <Title>TITLE from Marketing_Requirements where PUID LIKE ~'<#>
#>' and STATUS IN ('Current') order by PUID calculate all count[Row Count:]PUID
```

- 15** Paste the HTML code into the blank line, so it looks like this:

```
Script: select <Rqmt ID>PUID <Title>TITLE from Marketing_Requirements where PUID LIKE ~'<#>
<div><strong><span style="color: #008000;">Please enter the Requirement IDs in the field/box to the
right</span></strong></div>
<div>inbsp;</div>
<ol>
<li><strong><span style="color: #0000ff;">Each requirement ID must be enclosed in single quotes</span></strong></li>
<li><strong><span style="color: #0000ff;">If multiple IDs are requested, separate them with
comma</span></strong></li>
```

- 16** Click on **Save and Run**.

Glossary

Accept	A command that accepts a proposed change. The current status of the proposed requirement becomes "accepted," and a copy of the requirement is created with the Current Status of "current."
accepted	Current Status of a change request that was accepted.
access rights	The set of tasks that can be performed on a resource by a user.
alias	A set of keywords defined as variants or synonyms of a main keyword. For example, aliases of the keyword "calibrate" might be "calibrated," "calibrating," or even the wild card string "cal*". Unlike pseudonyms, which exist only while a particular Dimensions RM tool is active, aliases exist for the duration of the instance or until they are deleted.
alphanumeric attribute	An attribute that represents one line of alphanumeric text, such as the title of an acceptance test. It can be up to 1000 characters in length.
alphabetic sort	A simple alphabetical sort. Contrast with <i>numeric sort</i> . Alphabetical sort ignores character case (e.g. abc is identical to ABC).
attribute	Information that is logically associated with a class of information to further specify the information content. See also <i>class attribute</i> , <i>evaluated attribute</i> , <i>implicit attribute</i> , <i>relationship attribute</i> , <i>user-defined attribute</i> .
attribute constraint	A rule that permits a link to be created only if some attribute of the primary or secondary object obeys a specific constraint. See also <i>primary object</i> .
attribute type	The nature or data type of an attribute: e.g. alphanumeric string, free text field, or date.
audit trail	An historical trace of the various versions of requirements that lets you reconstruct requirement evolution. The Visual Network tool lets you view the audit trail graphically.
auto link	A utility that lets you create or break links between objects of the primary and secondary class in the selected relationship.
baseline	A stable, unchangeable group of requirements. Baselining a collection ensures that the collection will never change.
baseline lock	A lock on a specific version of an item that indicates that the version is part of a baseline and thus cannot be modified.
batch update	A utility that lets you change attribute values for all requirements that match a set of attribute constraints for any one class defined in the instance schema.
category	A method for organizing objects so you can create views of requirements, scripts, and filters for a subset of users. A requirement can belong to only one category.

cardinality rule	A rule that specifies the maximum number of links that can lead to and from primary or secondary objects. For example, a cardinality of 2:3 means that no more than two links can lead to a secondary object, and no more than three to the primary object.
change request	A proposal to change one or more requirement attributes.
child collection	Object hierarchies are created from the top down, from parent to child, while collection hierarchies are created in the opposite direction, by grouping child collections to form a parent collection, and so on. A child collection may be directly linked to an object. When a collection is created, it is a child collection by default.
child object	Whenever an object is edited and replaced, a new object is produced. The original object is called the parent object, and the new object is its child object. If this process is repeated, a child can itself be a parent of another child.
class	A container for related types of information. After classes are defined, requirements are entered into the class.
class attribute	A property of a class, as defined by the instance administrator, that further breaks down the information in the class. By specifying attributes for a class, the instance administrator can define the exact nature of the information represented by the class. This allows Dimensions RM users to make complex searches on their instance information. Without defined attributes, classes model information at only a relatively high level of abstraction and lack internal detail. In such cases, the resulting diagram simply shows an overview of the abstract data types pertaining to the instance, together with their interdependencies.
class definition	The initial Dimensions RM information modeling procedure the instance administrator uses to configure Dimensions RM with respect to the information to be generated and traced within the instance. This is represented graphically as a class definition diagram.
class definition diagram	A graphical representation of the information classes that exist in an instance, along with the relationships between the classes.
Class Definition	A Dimensions RM tool that lets users with special privileges (such as instance administrators) define various classes of information, attributes of those classes, and the relationships between the classes. By specifying the instance structure in this way, a class definition both constrains and supports the systems engineer in the way that instances of classes, attributes and relationships can be created during the lifetime of the instance. Systems engineers and other ordinary users can use Class Definition to view the class definition diagram for the instance. See also class definition diagram .
CM Lock	Configuration Management Lock. A security feature that makes objects read-only and stops them from being updated. You can lock requirements, collections, and documents.
collection	A way to group requirements of any class. Once a collection is created, it can be associated with a requirement by linking the requirement to the collection. Each requirement can be linked to many different collections, and each collection can be linked to many different requirements. Parent collections contain child collections. Child collections contain requirements. Parent collections are not directly linked to any requirements, only linked indirectly through their child collections. See also baseline .

collection linkability	An occurrence of the association defined by a relationship. It connects two objects.
command line tools	Dimensions RM tools (doc_out) that let you to run scripts from the DOS prompt. Doc_out lets you run a Dimensions RM reporting script to generate output to a variety of formats. With doc_tool, you can prepare scripts before extraction for batch processing of reports.
compliance check	A process in which Dimensions RM searches the database and produces a report specifying which objects do not contain links across a defined relationship.
compliance report	A report that lists requirements that are or are not linked to objects in the other class in a relationship. A full compliance report lists all requirements in the primary and secondary class, whether or not they are linked to each other. A compliance-only report lists either all matching requirements in the primary class that have links to matching requirements in the secondary class, or all matching requirements in the secondary class that have links to matching requirements in the primary class. A non-compliance report lists either all matching requirements in the primary class that have no links to matching requirements in the secondary class, or all matching requirements in the secondary class that have no links to matching requirements in the primary class.
CSV import	A utility that lets you import data from a comma separated value file into the Dimensions RM instance database.
current	Current Status of a requirement that is the most recent or current version.
Current Status	A special implicit attribute that identifies the state of a requirement.
cyclic relationship	Relationship in which the relationship points from one class back to the same class.
database	In the Dimensions RM environment, an instance of Oracle. The databases that are displayed in the Dimensions RM tools are determined by the contents of the tnsnames.ora file (an Oracle file).
date attribute	A user-defined attribute type that stores values that are based on user-defined date formats.
Delete	A command that changes the Current Status of a requirement to "deleted," but leaves the requirement in the instance.
deleted	Current Status of a requirement that was deleted. A deleted requirement remains in the instance. The prior version of the requirement, if any, receives a status of "current."
derivation	The analysis process in which an object is changed or translated into a form suitable for lower-level analysis and design.
derived object	A lower-level object that is necessary for the implementation of a higher-level object. When an object changes form, it becomes a derived object. In general, a derived object is directed toward some sub-element and is more specific than the original object.
Dimensions RM	A suite of multi-user, configurable tools that support the capture, management, traceability and documentation of systems engineering information.

Dimensions RM instance administrator	The person responsible for maintaining the data that is accessible to a particular instance. This includes using the Class Definition tool to implement the information model and, in some cases, the Database Management Utility to manage instance information.
Dimensions RM third-party integrator	Person responsible for using the API functions to integrate third-party tools with Dimensions RM.
doc_out	A command line tool that lets you run a reporting script and generate the output to a variety of formats.
Doctool	A Dimensions RM tool that interprets a documentation script and generates an on-screen report.
document	In the Documents View perspective in RM Browser, a hierarchical arrangement of chapters and requirements that can be edited. You can create a document from within Documents View or open one that was imported by the RM Import tool. From Documents View, you can publish a document as a Microsoft Word document or Adobe PDF document.
Documents View	An RM Browser view that provides a document-like presentation of requirements, with a table of contents, chapters, and subchapters. Requirements are contained within the chapters and subchapters. Document View allows you to easily add, delete, move, and edit chapters and requirements. Microsoft Word documents that you imported through RM Import are displayed in Document View. You can easily add, delete, move, and edit chapters and requirements from the imported Word document in Document View. See also Requirements View , Traceability View .
ECP	Engineering Change Proposal. A class type. As you create a set of related proposed requirements, you can link them to an ECP object so that they are easily accessible for review as a group.
e-mail notification	A feature that lets you register interest in certain types of changes within the instance data and to receive electronic notices of those changes.
evaluated attribute	An attribute that takes its value from the external environment. Such an attribute can be specified as the default value for alphanumeric, numeric or date attributes. At run time, the specified script or command is executed and the resulting value is set for the attribute.
expanding	A process in which a single parent object is edited to produce one or more child objects.
export utility	A utility that can be used to back up an instance or database. The package can be created as a collection of files in a single directory or as a single file, ready for transfer to the destination site.
file attachment attribute	A user-defined attribute type that can hold a single file or multiple files. File attachments can be accessed through RM Browser.
filter	A query against a single class. Form filters are the simplest kind of filter, but they are limited in terms of the complexity of the selection criteria. Complex filters provide greater expressive power for the selection criteria. With complex filters, you can construct detailed logical expressions that use attribute values, ranges of attribute values, and membership in relationships as selection criteria. Contrast with script .

flowdown	A systematic process in which objects are decomposed into allocated and derived objects, and then assigned to low-level model components. This flowdown process generates a hierarchical structure of refined objects derived from the objects captured for the system.
focusing	A process in which two or more parent objects are edited to produce a single child object.
form	A structure that displays requirement information for classes and relationships. A form is created for each class and relationship. You can create new forms by customizing the form that Dimensions RM generates, and can designate any form to be used as the default form.
form view	A view that displays requirements one at a time. From the form view you can edit requirement attributes.
genealogical links	Links between parent objects and child objects, or between parent collections and child collections.
generic links	Links that must span a relationship.
grid view	A view that lets you view multiple requirements in a table-like list. The column headings represent attributes of the requirements.
group	A collection of individual users grouped into a functional category. Access rights can be assigned to a group and all members of the group. If users have been assigned to an instance through a group, they inherit the group access rights, unless they have been explicitly granted or denied access.
group attribute	A group attribute is like a list attribute in that it provides a predefined list of values for user selection. But unlike a simple list attribute, a group attribute is composed of a series of sub attributes. The choices available to the user depend upon the selections they made in the higher level, or parent, attributes within the group attribute.
immediate child	The object that was created when the original object was replaced, focused, or expanded. Immediate children are the next version of objects in the line of descent and may be current objects or objects with another status.
immediate parent	The object that was used to create the currently selected object. Parent objects never have a status of "current."
immediate relationship	A relationship that refers to the immediate predecessor or successor of an object. Contrast with <i>source relationship</i> .
implicit attribute	An attribute that is used to maintain the integrity of instance information. Implicit attributes include intrinsic information such as the persistent unique identifiers (PUIDs), object IDs, and modification times. You cannot modify implicit attributes. Implicit attributes are supplied for each class and relationship. Contrast with <i>user-defined attribute</i> .
import utility	A utility that can be used to restore an instance or database from backup.
instance	A Dimensions RM work area where information is created and maintained.
lifecycle	The phases of an instance from its initial requirements specification through its implementation.

link	An instance of a relationship. You can link two requirements together if a relationship between their corresponding classes is defined.
list attribute	A user-defined attribute type that provides a list of values from which the Dimensions RM user can make a selection. For example, if you require the Dimensions RM user to choose one of a given set of values for the attribute <i>test_result</i> , specify the attribute as a list attribute, and define <i>pass</i> , <i>fail</i> , and <i>untested</i> as the set of allowed values. See also group attribute , which functions like an interdependent group of list attributes.
lock manager	A Dimensions RM tool used to lock and unlock Dimensions RM database elements such as source documents, tools, objects, and collections.
lowest level child	A current object that is descended from the selected object. The objects contained in the lowest-level children list may skip generations of an object; that is, they need not be immediate children of the selected object.
mandatory attribute	An attribute for which users must specify values. Contrast with optional attribute .
NOT_PRIMARY_IN	A relationship operator that is used to identify requirements that can be at the origin of a link, but do not.
NOT_SECONDARY_IN	A relationship operator that is used to identify requirements that can be at the termination of a link, but do not.
numeric attribute	A user-defined attribute type that holds numeric values, such as reference numbers. The numbers can include decimal points.
numeric sort	A method of sorting that is used for alphanumeric attributes such as paragraph numbers in outlines. For example, with a numeric sort, the numbers (10, 20, 1, and 2) are sorted as (1, 2, 10, 20) instead of (1, 10, 2, 20). Contrast with alphabetic sort .
object	Synonymous with requirement .
Object Editor	A Dimensions RM dialog used to modify attributes and edit, focus, and expand class information.
OLE	Object Linking and Embedding. A technology for transferring and sharing information among applications.
optional attribute	An attribute for which you can use the default values or leave blank. Contrast with mandatory attribute .
ORACLE_HOME	The logical pathname of the file system or network location of your Oracle installation.
parent collection	A collection that links child collections. Parent collections cannot be linked directly to an object.

parent object	An original object that produces a new object when the original object is edited. The original object is called the immediate parent object, and the new object is its immediate child object. If this process is repeated, a child object can itself be a parent object of another child object. In this way, the original parent object can spawn multiple levels of descendants, including both immediate child objects and lowest-level child objects. One or more parent objects can produce one or more child objects.
pending change request	A change request that has not yet been accepted or rejected. A pending change request has a Current Status of "proposed."
polling	A feature of RM Browser that lets you solicit feedback about a requirement from selected users. Polls are typically used to decide whether a specific requirement should be accepted, or to reach consensus concerning the content of a requirement.
primary class	The first class in a direct relationship between two classes. For example, in the relationship <i>Is_Testing_By</i> that connects class <i>Code_Module</i> and class <i>Acceptance_Tests</i> , <i>Code_Module</i> is the primary class, <i>Is_Testing_By</i> is the relationship, and <i>Acceptance_Tests</i> is the secondary class. The direction of the relationship arrow is always from the primary to the secondary class in the class definition diagram. This direction and positioning on the diagram defines the direction of the relationship. Contrast with secondary class .
PRIMARY_IN	A relationship operator that is used to identify requirements that are at the origin of a link.
primary object	An instance of a primary class to which objects are linked.
project	See "instance" on page 405 .
proposed	Current Status of a requirement for which a change request has been made to either change the current requirement or create a new requirement.
pseudonym	Text pattern used to locate objects to be linked to a collection. For example, pseudonyms of the keyword "calibrate" might be "calibrated," "calibrating," or even the wildcarded string "cal*". Unlike aliases, which exist for the duration of the instance or until they are deleted, pseudonyms exist only during the linking process. See also alias .
PUID	Persistent Unique Identifier. An intrinsic attribute.
query	A filter or script, expressed in terms of the instance schema, that you use to retrieve selected requirements.
Quick Search	A feature of the Requirements View in RM Browser that lets you quickly create a query to see the content of any category.
Reject	A command that rejects a proposed change. The Current Status of the proposed requirement becomes "rejected," and a copy of the requirement is created with the Current Status of "current."
rejected	Current Status of a change request that has been rejected.
relationship	An association between two classes. It is also an entity in its own right, in terms of having its own attributes and associated user access rights. See also link .

relationship attribute	A property of a relationship, such as its cardinality and its inheritance characteristics. Relationship attributes, defined by the instance administrator, can control how traceability is established across different relationships. Instance administrators can specify that links be created between two objects according to the value of one or more of the class attributes. For example, it can be specified that links can be created from a change request object to a requirement object only if the value of the change request object's attribute APPROVAL_STATUS is APPROVED. See also cardinality rule .
relationship rule	Circumstances under which links between objects will be permitted. See also cardinality rule .
Remove	A command that physically removes a requirement from an instance. Only requirements with a status of "current" can be removed.
Replace	A command that creates a new version of a requirement with the changes you made. The Current Status of the original requirement is changed from current to replaced, a parent-child link is created from the original requirement to the new requirement, and the current status of the new requirement is set to current.
replaced	Current Status of a requirement that has been replaced by a newer version.
resource category	A grouping of resources into a class of items. For example, a unique document name falls into the category of Documents. Resource categories are important when assigning default permissions because defaults are assigned to entire class of resources rather than an individual resource. Resource categories are also important when assigning appropriate transaction for a class of resources. Certain transactions are appropriate only for certain categories of resources.
requirement	An instance of a class. A description of a set of conditions applicable to a product or process; this description must be capable of being validated for success. A requirement object is satisfied by a product or process if a test reveals that the described conditions are met by the product or process. Synonymous with object.
Requirements View	An RM Browser view that lets you view and modify requirements that are organized by category. From this view, you can run an existing filter, run an existing script, run a quick search to create a new query, and add queries that you access frequently to a favorites folder. See also Documents View , Traceability View .
RM Browser	A Dimensions RM tool that provides Web access to a core set of Dimensions RM functions.
RM Import	A Dimensions RM tool that lets you preview a Microsoft Word document as a draft document, change the description of chapters, reorganize the chapters, change the values of attributes, move attributes between chapters, and so on. When satisfied with the draft document, you can import the document into Dimensions RM as a document that can be viewed and modified in the Document View of RM Browser.
RM Import Designer	A Dimensions RM tool that lets administrators design templates that users select when importing Word documents from RM Import. Templates define how to identify classes, attributes, chapters, requirements, and categories.
RM Manage	A Dimensions RM tool that lets instance administrators define users and groups, administer instance security, configure the instance database, organize data, and control user access and data routing.
RTM_HOME	A logical name for the file system location of Dimensions RM programs and data.

schema diagram	See class definition diagram .
script	A query against one or more classes. Scripts are the most comprehensive way to perform searches. They can be used to combine the selection criteria capabilities provided by complex filters, with complex link traversal, parameterization, basic calculations, and output formats. Contrast with filter .
script generator wizard	A Dimensions RM wizard that provides a graphical interface allowing the user to specify the contents of a given report.
secondary class	An object class that is the destination of the relationship arrow from a primary class in a class definition diagram. The relationship arrow points to the secondary class. Contrast with primary class .
SECONDARY_IN	A relationship operator that is used to identify requirements that are at the termination of a link.
snapshot	In the Document View of RM Browser, a read-only baseline of a document.
source document	A document, typically provided by the customer, which is input to the system being developed. A source document can also be written in Dimensions RM by using an empty document and inserting objects.
source relationship	A relationship that refers to the original object in a chain of versions. Contrast with immediate relationship .
suspect link	A link that becomes questionable after one of the requirements in the link changes. The change could render other requirements questionable, or "suspect."
tablespace	A logical storage unit. Your instance data is physically stored in one or more data files associated with a tablespace. Initially, only one file is associated with the tablespace, but you can add more files as you need them. The size of a tablespace is determined by the size of the data file or combined data files that make up the tablespace.
template	A set of rules defined by an administrator in RM Import Designer that determines how a document will be imported into Dimensions RM using the RM Import tool.
text attribute	A user-defined attribute type that holds up to 64 KB of alphanumeric, ASCII text that can span more than one line. It is suitable for long descriptions, such as the description of an acceptance test.
transactions	Actions associated with a category of resources that represent what can be done with that resource. For example, an update transaction is associated with a class definition. A user that has the update transaction for a particular class definition can change characteristics of that class definition and store them in the database.
traceability	The process of making explicit links between requirements and other entities. Traceability lets you trace the evolution of an instance.
Traceability View	An RM Browser view that provides a way to select the relationships you want to trace, with requirements limited to selected baselines, documents, collections, or categories; browse through the requirements that are part of the relationships; and then print traceability reports that display the information in a visual format that is easy to analyze. See also Documents View , Requirements View

type	A definition of the basic properties of a set of instances of a class, relationship, or attribute.
Undelete	A command that changes a the Current Status of a requirement from "deleted" to "current."
Update	A command that overwrites the content of the requirement. No history of the change is maintained. This is only recommended if previous versions of a requirement must be deleted. All other attributes, including Current Status, remain intact.
user	An individual responsible for performing basic information management tasks, such as capturing objects, including generic and CASE tool data in the Dimensions RM database, creating traceability links among requirements and other data, engineering and categorizing objects, and producing reports. An individual Dimensions RM user.
user attribute	A user-defined attribute type that provides a list of user names from which the Dimensions RM user can make a selection. A user attribute can contain all users, members of one or several groups or individual users.
user-defined attribute	An attribute that you can create for use in a specific class. See also alphanumeric attribute , date attribute , file attachment attribute , group attribute , list attribute , numeric attribute , text attribute , user attribute . Contrast with implicit attribute .

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