



# Dimensions® RM 12.6.2

## RM Browser User's Guide

Copyright © 2001–2019 Serena Software, Inc., a Micro Focus company. All rights reserved.

This document, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. Except as permitted by such license, no part of this publication may be reproduced, photocopied, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of Serena. Any reproduction of such software product user documentation, regardless of whether the documentation is reproduced in whole or in part, must be accompanied by this copyright statement in its entirety, without modification.

This document contains proprietary and confidential information, and no reproduction or dissemination of any information contained herein is allowed without the express permission of Serena Software.

The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Serena. Serena assumes no responsibility or liability for any errors or inaccuracies that may appear in this document.

Third party programs included with the Dimensions product are subject to a restricted use license and can only be used in conjunction with Dimensions.

### **Trademarks**

Serena, TeamTrack, StarTool, PVCS, Comparex, Dimensions, Prototype Composer, Mariner, and ChangeMan are registered trademarks of Serena Software, Inc. The Serena logo and Version Manager are trademarks of Serena Software, Inc. All other products or company names are used for identification purposes only, and may be trademarks of their respective owners.

### **U.S. Government Rights**

Any Software product acquired by Licensee under this Agreement for or on behalf of the U.S. Government, its agencies and instrumentalities is "commercial software" as defined by the FAR. Use, duplication, and disclosure by the U.S. Government is subject to the restrictions set forth in the license under which the Software was acquired. The manufacturer is Serena Software, Inc., 2345 NW Amberbrook Drive, Suite 200, Hillsboro, OR 97006.

Publication date: February 2019

# Table of Contents

---

## Chapter 1

<b>Preface</b> . . . . .	<b>13</b>
Contacting Technical Support . . . . .	13
<b>RM Browser Basics</b> . . . . .	<b>15</b>
Overview . . . . .	16
Common Terms . . . . .	17
Main Pages of the RM Browser Interface . . . . .	20
General Navigation and Controls in RM Browser . . . . .	21
Welcome Menu . . . . .	21
Menu Bar . . . . .	22
RM Instance Bread Crumb . . . . .	22
Categories Pane . . . . .	24
Recent Items . . . . .	25
Actions Pane . . . . .	26
Favorites . . . . .	26
Attribute Types . . . . .	27
Editable Grid, Grid, and Form Views . . . . .	28
Editable Grid View . . . . .	29
Grid View . . . . .	31
Form View . . . . .	31
Selecting Multiple Requirements . . . . .	32
Common Dialog Controls . . . . .	32
Category Drop-Down List . . . . .	32
Attributes to Display List . . . . .	33
Sorting Order List . . . . .	33
HTML Text Formatting Toolbar . . . . .	34
Find & Select User Dialog . . . . .	41
Attribute Constraints Tab . . . . .	42
Relationship Constraints Tab . . . . .	45
Display Options Tab . . . . .	48
Accessing Dimensions RM . . . . .	52
Logging Out . . . . .	53
Switching to Another RM Instance . . . . .	54
Changing Your Password . . . . .	54
Getting Help . . . . .	55
Enabling and Disabling E-Mail Notifications . . . . .	55
Glossary . . . . .	55
Graph Editor . . . . .	56
Opening the Graph Editor . . . . .	56
The Graph Editor Dialog . . . . .	57
File Menu . . . . .	57
Importing Visio Files . . . . .	58

Additional Information . . . . .	58
Opening the Full Interface. . . . .	58
Viewing Version, System, and Contact Information . . . . .	58
Sample Databases . . . . .	59
The QLARIUS_RM Sample Database . . . . .	59
The RMDEMO Sample Database . . . . .	60
Using Spell Check in RM Browser . . . . .	60
Configuring Internet Explorer . . . . .	60
Configuring Edge. . . . .	61
Configuring Firefox . . . . .	62
Configuring Chrome. . . . .	63

## Chapter 2

<b>Configuring User Settings and Instance Settings . . . . .</b>	<b>65</b>
User Settings Versus Instance Settings . . . . .	66
Configuring User Settings and Instance Settings . . . . .	66
General Settings . . . . .	66
Quick Search Settings . . . . .	70
Document Settings . . . . .	71
Report Settings. . . . .	74
Link Browser Settings . . . . .	74
Split View Settings . . . . .	75
Branch/Sync View Settings. . . . .	76
Customizing My Work Page . . . . .	76

## Chapter 3

<b>Working with Requirements . . . . .</b>	<b>79</b>
Requirement Basics . . . . .	80
Finding Requirements with Quick Search . . . . .	80
Printing Requirements . . . . .	85
Explaining Update and Delete Functions. . . . .	89
Using the Actions Box . . . . .	90
Viewing Information about a Class . . . . .	90
About Requirement Versions. . . . .	91
About Requirement Locks . . . . .	91
Workflows . . . . .	92
Copying the URL of a Requirement to the Clipboard. . . . .	94
Working with Requirements and Change Requests. . . . .	95
Creating a New Requirement . . . . .	95
Mass Creating Requirements. . . . .	97
Proposing a New Requirement . . . . .	98
Editing a Requirement . . . . .	99
Copying a Requirement . . . . .	101
Using the Expand Feature . . . . .	102
Deleting a Requirement . . . . .	102
Undeleting a Requirement . . . . .	102
Removing a Requirement Version . . . . .	103
Printing a Requirement . . . . .	103
Changing the Class of a Requirement . . . . .	103
Viewing the Requirements in a Category, Document, Report, Collection, or	

Baseline . . . . .	104
Submitting a Change Request. . . . .	104
Reviewing a Change Request/Proposed Requirement. . . . .	105
Working with Links. . . . .	106
Linking an Existing Requirement . . . . .	107
Linking Existing Requirements through Quick Search. . . . .	108
Creating a new Requirement and linking to it . . . . .	110
Proposing a new Requirement and linking to it . . . . .	111
Deleting or Removing Links . . . . .	111
Restoring a deleted Link. . . . .	111
Clearing a Suspect Link . . . . .	112
Link Properties . . . . .	112
Suspect Links . . . . .	113
Using the Suspect History . . . . .	115
Inherited Links . . . . .	116
Using Link Browser . . . . .	117
Working with Containers. . . . .	121
Adding a Requirement to an Existing Container. . . . .	121
Removing a Requirement from a Container . . . . .	122
Opening a Container . . . . .	122
Inherited Containers . . . . .	122
Container Properties . . . . .	123
Adding Requirements to an Existing Collection . . . . .	123
Working with File Attachments . . . . .	124
Working with Group Attributes . . . . .	125
Viewing Requirement History . . . . .	127
Viewing History Differences . . . . .	128
Changing the Attributes in the History Section . . . . .	129
Changing Requirement Versions in Documents . . . . .	130
Using Pedigree View . . . . .	131
Merging Requirement Changes . . . . .	133
Merge Status . . . . .	134
Viewing Prior Versions of the Requirement . . . . .	135
Merging Changes . . . . .	135
Branching and Merging Requirements . . . . .	135
About Branching and Merging . . . . .	136
Creating a New Project . . . . .	137
Creating a New Product . . . . .	138
Editing a Project . . . . .	139
Editing a Product. . . . .	139
Branching a Single Requirement . . . . .	139
Branching Multiple Requirements . . . . .	140
Merging a Single Requirement . . . . .	141
Merging Multiple Requirements . . . . .	142
Polling . . . . .	142
Creating a Poll . . . . .	143
Modifying a Poll. . . . .	144
Closing a Poll . . . . .	145

Casting a Vote . . . . .	145
Viewing Polling Results. . . . .	145
Adding Active Polls to My Work Dashboard . . . . .	146
Participating in Discussions . . . . .	146
Adding a Comment from the Menu Bar . . . . .	147
Adding a Comment from a Discussion . . . . .	147
Changing the Discussion View. . . . .	147

## Chapter 4

<b>Working with Documents . . . . .</b>	<b>149</b>
About Documents . . . . .	150
Document Basics . . . . .	151
Navigation Pane . . . . .	151
Detail Pane. . . . .	152
Opening Documents or Snapshots . . . . .	157
Working with Limited Permissions . . . . .	158
Working with Document Changes . . . . .	158
Finding and Replacing Character Strings . . . . .	158
Moving a Document or Snapshot to a different Category . . . . .	160
Copying the URL of a Document to the Clipboard . . . . .	160
Working with Documents . . . . .	162
Creating a New Document . . . . .	162
Deleting a Document . . . . .	164
Saving a Copy of a Document Under a New Name. . . . .	165
Document Settings . . . . .	165
Referencing Elements in a Document. . . . .	171
Merging Document Changes . . . . .	172
Working with Chapters and Requirements. . . . .	175
Creating a New Chapter . . . . .	175
Editing a Chapter . . . . .	177
Editing a Chapter in Entire Document View Mode . . . . .	178
Deleting a Chapter . . . . .	178
Formatting Chapters . . . . .	179
Adding Requirements to a Document. . . . .	180
Deleting a Requirement from a Document . . . . .	181
Moving Chapters and Requirements. . . . .	181
Proposing Changes to a Chapter . . . . .	182
Converting Chapters into Requirements . . . . .	183
Assigning an ECP to a Document. . . . .	183
Change which Requirement Version Is Included in a Document. . . . .	184
Merging Chapter Changes . . . . .	185
Working with Comments. . . . .	188
Adding a Comment to Text. . . . .	189
Working with Snapshots . . . . .	190
Creating a Snapshot of a Document . . . . .	190
Working with Snapshots of an Open Document. . . . .	191
Working with Snapshots of a Closed Document. . . . .	191
Comparing Documents and Snapshots . . . . .	191
Working with the Requirement Difference Summary . . . . .	192

Publishing the Document Differences Report . . . . .	193
Viewing a Snapshot or Document . . . . .	193
Publishing Documents . . . . .	193
Publish as a Microsoft Word Document. . . . .	193
Publish as a Roundtrip Document . . . . .	196
Publish as an Adobe PDF Document. . . . .	197
Publish as a Microsoft Excel Spreadsheet . . . . .	197
Publish as a ReqIFZ Document . . . . .	198
Copying the Publish URL of a Document to the Clipboard . . . . .	199
Using Workflows with Documents . . . . .	199
Assigning a Document to a Workflow . . . . .	199
Executing a Transition on a Document . . . . .	200
Viewing Information about a Document . . . . .	200

## Chapter 5

<b>Working with the Home View . . . . .</b>	<b>201</b>
About the Home View. . . . .	202
Dashboard Tab . . . . .	202
Using Dashboards . . . . .	203
Using Dashboard Widgets. . . . .	204
Creating a Dashboard . . . . .	204
Adding a Standard Report to the Dashboard. . . . .	206
Adding a Graphical Report to the Dashboard . . . . .	206
Using Reports with Runtime Parameters. . . . .	207
Adding a Website to the Dashboard. . . . .	207
Copying a Dashboard. . . . .	208
Renaming a Dashboard . . . . .	208
Deleting a Dashboard . . . . .	208
Exporting a Dashboard. . . . .	209
Documents Tab . . . . .	209
Requirements Tab . . . . .	210
Reports Tab . . . . .	210
Collections Tab . . . . .	212
Baselines Tab . . . . .	212
Glossary Tab . . . . .	213
Adding a new Glossary Entry . . . . .	213
Editing a Glossary Entry . . . . .	213
Copying a Glossary Entry . . . . .	214
Deleting a Glossary Entry . . . . .	214
Viewing Extended Information . . . . .	214
Working with Products and Projects . . . . .	215
Copying Category Content . . . . .	215

## Chapter 6

<b>Working with Reports . . . . .</b>	<b>217</b>
Running Reports . . . . .	218
Relationship Reports . . . . .	218
Editing a Report. . . . .	219
Creating a Class Report . . . . .	221
Creating a Relationship Report . . . . .	222

Creating a Traceability Report . . . . .	224
Working in the Traceability Work Page . . . . .	226
Understanding the Traceability Tree . . . . .	227
Customizing the Traceability Tree . . . . .	228
Creating a Graphical Report . . . . .	229
Moving and Copying Reports to a Different Category . . . . .	232
Renaming Reports . . . . .	233
Deleting Reports . . . . .	233
Copying the URL of a Report to the Clipboard . . . . .	233

## Chapter 7

<b>Working with Collections . . . . .</b>	<b>237</b>
About Collections . . . . .	238
Collection Basics . . . . .	238
Opening a Collection to the Collection Work Page . . . . .	238
Creating a New Collection. . . . .	238
Deleting a Collection . . . . .	239
Managing Requirements in a Collection . . . . .	239
Refreshing the Contents of a Collection . . . . .	240
Updating Collection Properties . . . . .	241
Baselining a Collection . . . . .	241
Comparing Collections . . . . .	243
Using Workflows with Collections . . . . .	243
Assigning a Collection to a Workflow . . . . .	243
Executing a Transition on a Collection . . . . .	244
Viewing Information about a Collection . . . . .	244
Moving Containers to a Different Category . . . . .	244
Copying the URL of a Collection to the Clipboard . . . . .	245

## Chapter 8

<b>Importing Requirements . . . . .</b>	<b>247</b>
Importing Requirements from Microsoft Word Documents. . . . .	248
Should I Use RM Browser or RM Import? . . . . .	248
Formatting Requirements for Import . . . . .	248
Formatting an Entire Word Document for Import. . . . .	250
Importing a Word File . . . . .	251
Category Import Formats. . . . .	252
Date Import Formats . . . . .	252
Importing a Roundtrip Document. . . . .	253
Importing Requirements from an XML File . . . . .	253
Category Import Formats. . . . .	255
Date Import Formats . . . . .	255
Importing Requirements from a CSV File . . . . .	255
Category Import Formats. . . . .	259
Date Import Formats . . . . .	260
Importing Test Case and Test Run Requirements. . . . .	260
Importing Requirements from a ReqIF File . . . . .	261
Importing Requirements from IBM Rational DOORS. . . . .	261
Importing Baselines from IBM Rational DOORS. . . . .	264
Importing Previously Exported Requirements . . . . .	265



*Chapter 9*

<b>Test Case Management</b> . . . . .	<b>267</b>
Overview . . . . .	268
Creating a Test Case . . . . .	268
Creating a Test Run . . . . .	268
Mass Creating Test Runs. . . . .	269
Test Step Functions . . . . .	269

*Chapter 10*

<b>Agile</b> . . . . .	<b>271</b>
Before you start. . . . .	272
Agile Basics. . . . .	272
About Agile. . . . .	272
Comparing Requirements Management and Agile Approaches. . . . .	273
Accessing Agile . . . . .	273
About Products . . . . .	274
About Releases . . . . .	274
About Stories . . . . .	274
About Sprints . . . . .	274
About Features . . . . .	275
About Epics . . . . .	275
About Badges . . . . .	275
About Capacity . . . . .	275
Tool Tips . . . . .	276
Display Options . . . . .	276
Showing Additional Story Attributes . . . . .	276
Agile Tabs. . . . .	277
Overview Tab . . . . .	277
Product Backlog Tab . . . . .	278
Product Storyboard Tab . . . . .	279
Sprint Planning Tab . . . . .	280
Sprint Storyboard Tab . . . . .	281
Using Agile . . . . .	282
Using Products . . . . .	282
Using Releases . . . . .	283
Using Epics. . . . .	284
Using Features . . . . .	285
Using Stories . . . . .	286
Using Sprints . . . . .	287

*Chapter 11*

<b>Administration.</b> . . . .	<b>289</b>
About Administration . . . . .	290
Managing Users. . . . .	290
Creating a New User . . . . .	290
Copying an Existing User . . . . .	291
Editing a User. . . . .	291
Assigning a User to one or several Groups . . . . .	292
Un-Assigning a User from one or several Groups. . . . .	292
Deleting a User. . . . .	293
Managing Groups. . . . .	293

Assigning Users to a Group . . . . .	293
Un-Assigning Users from a Group . . . . .	293
Managing Categories . . . . .	294
Adding a Category . . . . .	294
Deleting a Category . . . . .	294
Renaming a Category . . . . .	295
Activating/Deactivating a Category . . . . .	295
Moving a Category . . . . .	295
Managing Access Rights . . . . .	296
Moving Requirements Between Categories . . . . .	298
Managing Document Locks . . . . .	299
Managing Requirement Locks . . . . .	299
Managing List Attribute Values . . . . .	299
Adding List Values . . . . .	300
Deleting List Values . . . . .	300
Ordering List Values . . . . .	301
Changing a List Value on Existing Data . . . . .	301
Limiting List Values to Categories . . . . .	302
Configuring Calculated Attributes . . . . .	303
Adding a Calculated Attribute . . . . .	303
Editing a Calculated Attribute . . . . .	304
Deleting a Calculated Attribute . . . . .	304
About Formulas . . . . .	304
Configuring Instance Settings . . . . .	306
Configuring Agile . . . . .	306
Products . . . . .	307
Releases . . . . .	307
Sprints . . . . .	307
Epics . . . . .	308
Features . . . . .	308
Stories . . . . .	308
Clearing Agile Mappings . . . . .	309

## Chapter 12

<b>Script Syntax . . . . .</b>	<b>311</b>
Overview . . . . .	312
SELECT Statement . . . . .	312
DTPtag . . . . .	313
DTP_TEXT Display Item . . . . .	314
RTM_KEYWORD Display Item . . . . .	314
WHERE Clause . . . . .	314
ORDER BY Clause . . . . .	323
CALCULATE Statement . . . . .	324
XREF Statement . . . . .	325
PLUS Statement . . . . .	327
COMMENT Statement . . . . .	327
Adding Rich Format Text to Query Prompts . . . . .	329

<b>Glossary . . . . .</b>	<b>333</b>
<b>Index. . . . .</b>	<b>343</b>



# 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

License and copyright information for third-party software included in this release can be found as part of the software download available at:

<http://support.serena.com/Download/Default.aspx>

# Chapter 1

## RM Browser Basics

---

Overview	16
Common Terms	17
Main Pages of the RM Browser Interface	20
General Navigation and Controls in RM Browser	21
Editable Grid, Grid, and Form Views	28
Common Dialog Controls	32
Accessing Dimensions RM	52
Switching to Another RM Instance	54
Changing Your Password	54
Getting Help	55
Enabling and Disabling E-Mail Notifications	55
Glossary	55
Graph Editor	56
Opening the Full Interface	58
Viewing Version, System, and Contact Information	58
Sample Databases	59
Using Spell Check in RM Browser	60

# 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 Serena® 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 333](#).

## 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 150](#).

## 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 217](#) and ["Script Syntax" on page 311](#).

## 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 to enter or select data and are represented by a text box, list, or other control (see chapter ["Common Dialog Controls" on page 32](#)). 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 99](#)).


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"> <li>■ <b>Yes:</b> Enabled</li> <li>■ <b>No:</b> Disabled</li> </ul> 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 <a href="#">"Suspect Links" on page 113</a> 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".

# 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, or to open and/or review a Document, Report, Collection, or Baseline. 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, Reports, Collections, Baselines**, and, if defined, the **Glossary**; all are defined 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.
- **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.

**My Work:** Historically, this page was used to display recently modified objects, comments, etc. These basic reports have been moved to the "My Work" Dashboard on the "Home View". The continued maintenance/use of the "My Work" page is left to the discretion of the RM Administrator.

**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 24](#)
- ["Recent Items" on page 25](#)
- ["Actions Pane" on page 26](#)
- ["Favorites" on page 26](#)
- ["Attribute Types" on page 27](#)

### Welcome Menu

 Welcome, joe ▾

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 54](#).

- **Help:** This opens the RM Browser help. See ["Getting Help" on page 55](#).
- **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 55](#).
- **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 58](#).
- **Log Out:** This ends your RM Browser session and displays the **Log In** page. See ["Logging Out" on page 53](#).

## 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 201](#).
- **New:** This menu opens the dialogs that create new items, such as requirements, reports, documents, collections, and baselines.
- **My Work:** This button is only available, if it has been enabled by your administrator. Clicking this button opens the **My Work** page, which displays items you have recently worked on, and/or the results of various queries defined for this purpose. To configure the **My Work** page, see chapter ["Customizing My Work Page" on page 76](#).
- **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 85](#).
- **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 271](#).
- **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 247](#).
- **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 289](#).

## 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:**

RMDEMO ▾ ➤ 📁 RMDEMO\Quality\Safety

- 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 54](#).  
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.

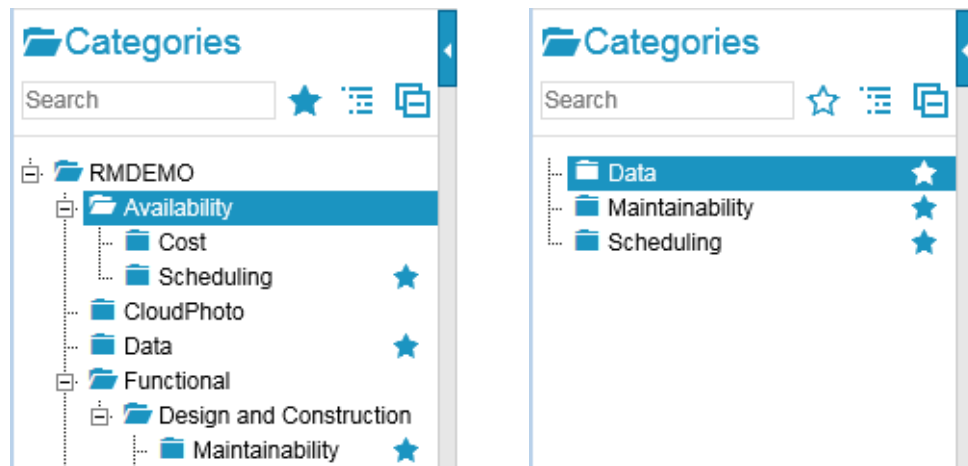
**Extended Bread Crumb:**

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 54](#).  
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.

**To view the requirements in a category and/or sub-categories, do the following:**

- 1 Select the desired categories in the Category pane.
- 2 Click **View Requirements** from the Category listing on the Actions pane.
- 3 This will switch the view to **Requirements**, with the category selection displayed.




**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**.

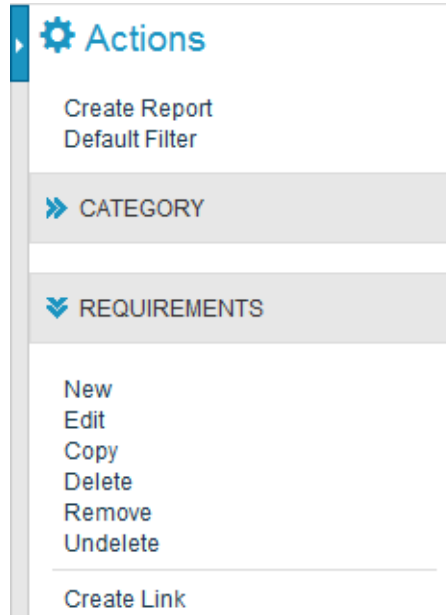
The **Recent** list can be comprised of any or all of: documents, snapshots, requirements, reports, collections, or baselines.

**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 66](#)).

## 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
<b>Alphanumeric</b>	A single line of text up to 1000 characters.
<b>Text</b>	<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 <a href="#">"HTML Text Formatting Toolbar"</a> on page 34.</p>
<b>Date</b>	Allows to select either date or date and time. The date format is defined by the administrator.
<b>List</b>	<p>A list of values configured by the administrator.</p> <p>If selection of multiple values is allowed, use these modifier keys:</p> <p><b>Click:</b> Makes a list value as selected value. All other selected values will be unselected.</p> <p><b>Ctrl+Click:</b> Add or remove a list value from the selected values.</p> <p><b>Shift+Click:</b> Adds all values between the previous selected value and the clicked value to the selected values.</p>
<b>Group</b>	<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><b>Example:</b> 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.          To add a new (empty) row, click .          To add a new row with the values of the selected row, click .          To remove a row, click .</p> <div>  <p><b>TIPS</b></p> <ul style="list-style-type: none"> <li>■ To have all values added, choose <b>(Select all)</b> from the drop down list; if all are not selected, multi-select has not been activated for this group.</li> <li>■ To query for an empty value, choose <b>(None)</b> from the drop down list.</li> <li>■ 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.</li> </ul> </div>

Attribute Type	Description
<b>User</b>	<p>A list of user names, which can be configured by user group or individual 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><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ The Administrator configured the user list to show only users of the Administrators group.</li> <li>■ 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.</li> </ul> <p>Next to the user attribute, you find the  button, which opens the <b>Find &amp; Select User</b> dialog. For further info, see chapter <a href="#">"Find &amp; Select User Dialog"</a> on page 41.</p>
<b>Numeric</b>	Accepts only numeric values.
<b>Calculated</b>	A read-only numeric attribute which is calculated when an attribute specified in the formula is changed.
<b>File Attachment</b>	<p>The file attachment attribute holds one file. File attachments are added, viewed, replaced, or deleted by clicking links.</p> <p>To add a file attachment, click <b>Attach</b>.</p> <p>To replace a file attachment, click <b>Replace</b>.</p> <p>To delete a file attachment, click <b>Delete</b>.</p> <p>To view a file attachment, click the file name.</p> <p>By default, file attachment attributes reside in the <b>File Attachments</b> section of a requirement.</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 29](#)
- **Grid:**    ["Grid View" on page 31](#)
- **Form:**    ["Form View" on page 31](#)



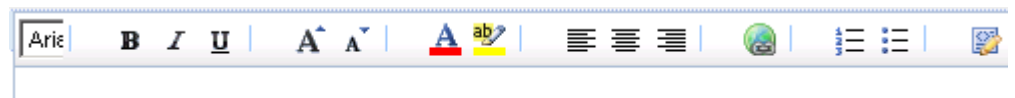
**NOTE** If the query includes more than one class, the Form view is not available.

## Editable Grid View

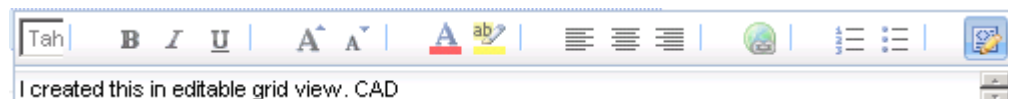
Marketing_Requirements (29)			
Load All   Page 1 of 1   Total number of pages/requirements - 1/29			
<input type="checkbox"/>	Category	Rqmt ID	Title
<input type="checkbox"/>	RMDEMO	MRKT_000003	Runs on "standard" home PC
<input type="checkbox"/>	RMDEMO	MRKT_000004	Annotate photos with text
<input type="checkbox"/>	RMDEMO	MRKT_000020	Provide photo special effects
<input type="checkbox"/>	RMDEMO	MRKT_000021	Border layouts provided

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 in the cell when you double-click the cell for editing. It has two modes. To toggle between them, click the **Source Edit** () button.
  - **Format:** In this mode you can apply formatting to the text, but you cannot edit the text.



- **Source Edit:** In this mode you can edit the text, but you cannot apply formatting to the text.



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 (8)				
	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 99](#)).

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 8 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  
 POLLS  
 CONTAINERS

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 99](#)).

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

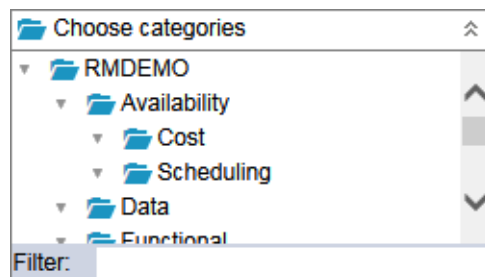
- If the requirements are shown in sections (e.g. in Quick Search when searching over several/all classes), **Ctrl+A** only selects the requirements in the active section.
- When using Quick Search in Split View mode, multi-selection is only allowed for the referenced class.

## 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 32](#)
- ["Attributes to Display List" on page 33](#)
- ["Sorting Order List" on page 33](#)
- ["HTML Text Formatting Toolbar" on page 34](#)
- ["Find & Select User Dialog" on page 41](#)
- ["Attribute Constraints Tab" on page 42](#)
- ["Relationship Constraints Tab" on page 45](#)
- ["Display Options Tab" on page 48](#)

### 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 50](#).

## 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.

**Sorting order:**

**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.

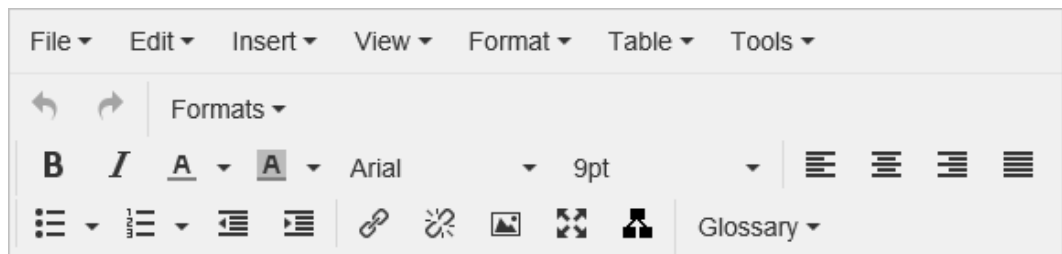


**NOTE** If you choose an attribute with the *Date* data type, the results are sorted in date order regardless of whether you chose **Alphabetic** or **Numeric**.

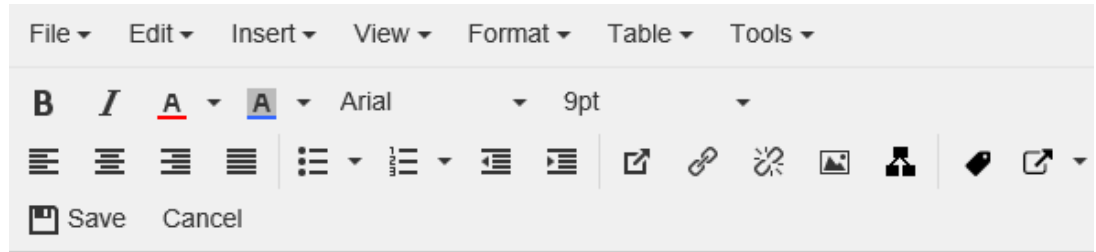
#### To specify the sort direction:

- 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:

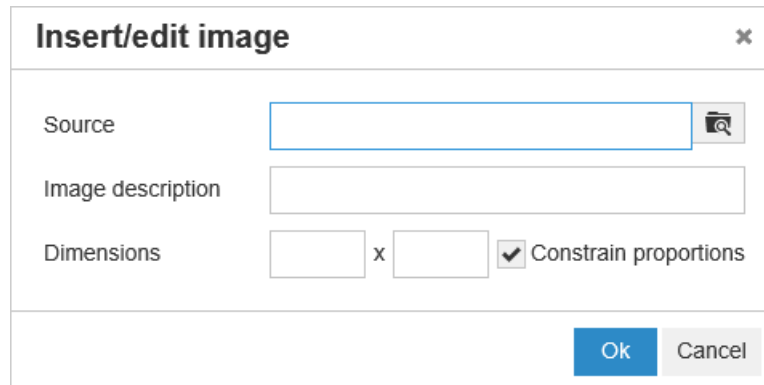
- Undo and Redo
- Select text formats
- Apply bold and italic formatting.
- Select text color and background color.
- Select the font family and size.
- Align the text.
- Apply list formatting.
- Apply indentation formatting.
- **Open link:** Click to open a selected link. Note that this button is only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

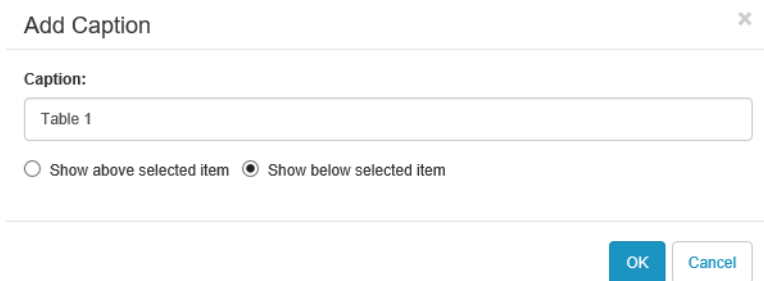
-  **Insert/edit image:** To insert a graphic into the attribute, place the cursor where you want to insert the image. To edit the HTML parameters of an existing image, select the image element. Then click the **Insert/edit image** button. The **Insert/edit image** dialog opens. Complete the fields as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



The **Insert/edit image** dialog box contains the following fields and controls:


- Source:** A text input field with a file selection icon on the right.
- Image description:** A text input field.
- Dimensions:** Two text input fields for width and height, separated by an 'x'.
- Constrain proportions:** A checked checkbox.
- Buttons:** **Ok** and **Cancel** buttons at the bottom right.

-  **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 56](#).
-  **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**.



The **Add Caption** dialog box contains the following fields and controls:

- Caption:** A text input field containing the text "Table 1".
- Position:** Two radio buttons: **Show above selected item** (unselected) and **Show below selected item** (selected).
- Buttons:** **OK** and **Cancel** buttons at the bottom right.

-  **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**.

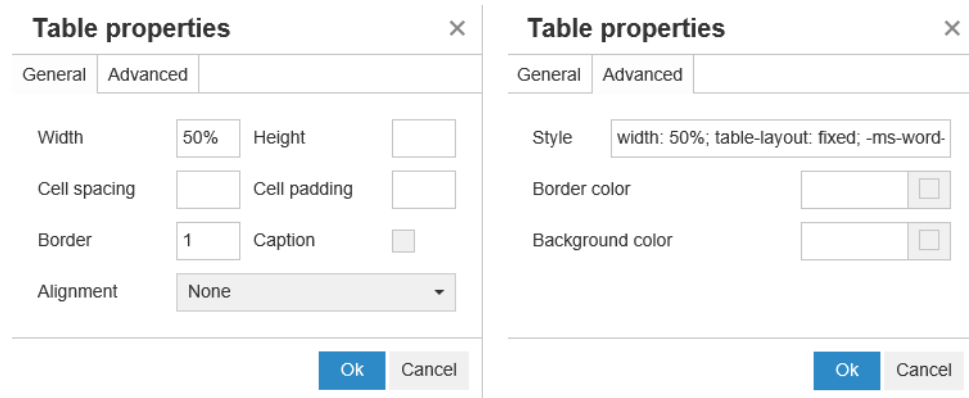
- **Reference Type:**
  - **Chapter/Requirement:** The **Select** box shows all chapters and requirements of the current document.
  - **Figure:** The **Select** box shows all images with a caption.
  - **Table:** The **Select** box shows all tables with a caption.
- **Select:** Depending on your choice 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.
- **Reference Name:** This is the text used for the reference link. By default, it is the title for chapters or requirements, or the caption for images and tables. Modify it as you see fit.
- **Refresh:** Updates the selected cross reference link.
- **Glossary menu:** The **Glossary** menu is only available if your administrator created the Glossary class as described in the *Administrator's Guide*. It contains the following menu entries:
  - **Add entry:** Opens the **New Term** dialog, which allows to add a new term to the glossary.
  - **Scan text:** Scans the text for matching glossary entries. For each matching word, a tooltip provides the explanation of that word. To easily recognize a match, the word is shown in white text and cyan background color.
- **Save:** Saves your modifications. **Save** is only available in Entire Document View.

- **Cancel:** Discards your modifications. **Cancel** is only available in Entire Document View.

### Table Properties

To open the table properties, execute these steps:

- 1 Select the table.
- 2 Click  in the popup toolbar. This opens the **Table Properties** dialog.



- **Width:** Specifies the width of the table. The width can be specified in % (e.g. 50%) or pixels (e.g. 75).
- **Height:** Specifies the height of the table. The height can be specified in % (e.g. 50%) or pixels (e.g. 75).
- **Cell spacing:** Defines the distance in pixels between two cells or the cell and the table border.
- **Cell padding:** Defines the distance in pixels between the cell content and the cell border.
- **Border:** Defines the width in pixels of the table border. A value of 0 means no border.
- **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.

The image shows two versions of the 'Row properties' dialog box. The left version is the 'General' tab, which includes 'Row type' (a dropdown menu currently showing 'Body'), 'Alignment' (a dropdown menu currently showing 'None'), and 'Height' (a text input field). The right version is the 'Advanced' tab, which includes a 'Style' text input field, and two color selection controls: 'Border color' and 'Background color', each consisting of a text input field and a small grey square button for color selection. Both dialogs have 'Ok' and 'Cancel' buttons at the bottom right.

- **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).
  - **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.

The image shows two versions of the 'Cell properties' dialog box. The left version is the 'General' tab, which includes input fields for 'Width' and 'Height', and dropdown menus for 'Cell type', 'Scope', 'H Align', and 'V Align'. The right version is the 'Advanced' tab, which includes a 'Style' input field and color pickers for 'Border color' and 'Background color'. Both dialogs have 'Ok' and 'Cancel' buttons at the bottom right.

- **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 User Dialog

Find&Select User ✕

User ID ▲	First Name	Last Name
Filter by ID...	Filter by First Name...	Filter by Last Name...
ADMINISTRATION	Samuel	Gray
BUSINESS_ANALYST	Eric T.	O'Brien
DEV	Jordan	Cooper
DEV_MANAGER	Erica	Morgan
DEVELOPMENT	Susan	Smith
ENGINEERING	Daniel	Hughes
EPHOTO	Ryan	Forbes
EPHOTO_DEV	Martin	Dane
EPHOTO_INFO	Carter	Benton
EPHOTO_LEAD	Eve	Byron
EPHOTO_PO	Don	Myers
JOE	Joseph	Wilson
MANAGEMENT	Alexis	Grosby
MARKETING	Luck	McMallon
PRODUCT MANAGER	Henry	Miller

OK
Cancel

The **Find & Select User** dialog provides a list of all users with their full names. 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.

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



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

## 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:

When querying a group attribute, all values of a group attribute must match for a requirement to be listed in the result. If a group attribute has several rows, a requirement must match all rows selected. For further information about group attributes see chapters ["Finding Requirements with Group Attributes" on page 82](#) and ["Working with Group Attributes" on page 125](#).

## 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.
not =	The attribute does not equal the value you specify. The wildcard characters *, %, and _ are supported.
<	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.
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 date format specified in the attribute definition.

**To use the date and time control:**

- 1 Click the calendar icon . The date and time control opens.



- 2 Do one of the following:

- Select a month, year, day, and time, and then click **close**.



**NOTE** To change a unit of time (that is, an hour, minute, or second), select the unit of time, and then click the up or down arrow button.

- Click **now** to specify the current date and time.

The date attribute field is populated with the date and time you specified.

- 3 To clear the date attribute field, click the calendar icon, and click **clear**.

## 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.

Collection restraints describe collection memberships to use 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
- 2 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
- 3 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
- 4 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
- 5 *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**

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

Alphabetic  
Numeric

Rqmt ID

☐ Remember these options

View Script Preview Run Cancel

**Traceability Report: Marketing\_Requirements** ?

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

**Choose a class:**

Approval  
 Chapter  
 Component\_Requirements  
 Defects  
 Design  
 Discussions  
 ECPs  
 Glossary  
**Marketing\_Requirements**  
 Product  
 Product\_Requirements  
 Project  
 Tests

**ATTRIBUTES TO DISPLAY**

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

Suspect  
Rqmt ID  
<DEFAULT\_TITLE>

☐ Add row count

**SORTING ORDER**

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

Alphabetic  
Numeric

Rqmt ID

☐ 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 33.

- 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 33](#).
- 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.
<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 <b>Grid/Editable Grid Requirement Layout</b> 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 <b>Grid/Editable Grid Requirement Layout</b> 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 <a href="#">"Test Case Management" on page 267</a> ) this requirement links to. In result lists (i.e. Quick Search, reports or documents in <b>Grid/Editable Grid Requirement Layout</b> 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 <b>Grid/Editable Grid Requirement Layout</b> mode), you can open a list of linked requirements by clicking the arrow or number in the <b>Links In</b> 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 <b>Grid/Editable Grid Requirement Layout</b> mode), you can open a list of linked requirements by clicking the arrow or number in the <b>Links Out</b> 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"> <li>■ <b>Yes:</b> Enabled</li> <li>■ <b>No:</b> Disabled</li> </ul> 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 <b>Proposed</b> . 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 <a href="#">"Reviewing a Change Request/Proposed Requirement" on page 105</a> .

Attribute Name	Script Name	Description
<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.
<Snapshots>	RTM_SNAPSHOTS	The names of the document snapshots referencing the requirement.

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 311](#). 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)



### 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.

## 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:

ORCL : [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 52.

## 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 213](#);
- on HTML attributes in requirements and document chapters, see chapter ["HTML Text Formatting Toolbar" on page 34](#) and
- in documents, clicking the  icon scans for glossary entries, see chapter ["Detail Pane" on page 152](#).


## 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:**

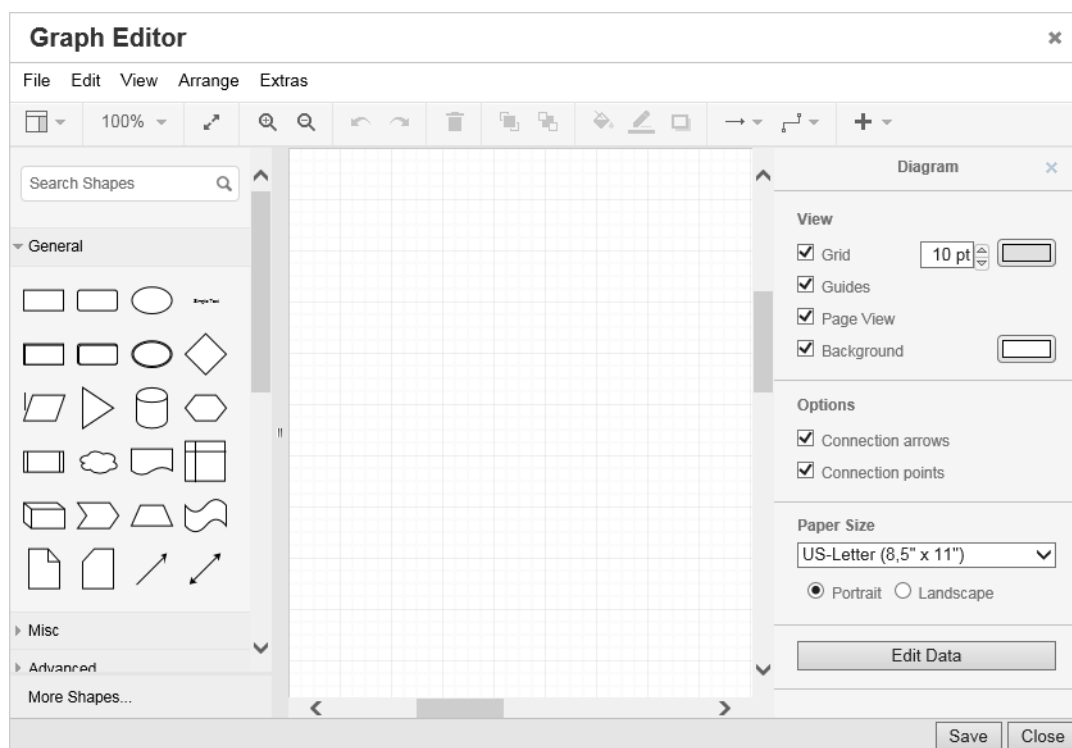
- 1 Open the chapter editor.
- 2 Click into the chapter description box.
- 3 Click .



## 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:** Allows import of Microsoft ® Visio files in vsdx format. For further information about importing Microsoft ® Visio files, see chapter ["Importing Visio Files" on page 58](#).
- **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 Visio Files

The MS Visio file import allows to import files in **VSDX** format only; other formats (e.g. VSD) are not supported.

**To import MS Visio files, do the following:**

- 1 On the **File** menu, point to **Import**, then select **.vsdx**.
- 2 Click **Browse....** This opens the **Choose File to Upload** dialog.
- 3 Select the file you wish to import and click **Open**.
- 4 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>.

## 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
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 61](#).

### 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 62](#).

**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 63](#).

**To configure Chrome 63, execute these steps:**

- 1** Click , then select **Settings** from the menu.
- 2** Click **Advanced**.
- 3** Scroll down until you reach the **Languages** section.
- 4** Expand the **Spell check** section.
- 5** Click the switch for the desired language (spell check is enabled when the switch is on the right).

### *Installing additional Dictionaries*

**To add a dictionary to Chrome 63, execute these steps:**

- 1** Click , then select **Settings** from the menu.
- 2** Browse to the end of the page and click **Advanced**.
- 3** Scroll down until you reach the **Languages** section.
- 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** Expand the **Spell check** section.
- 9** Click the switch for the desired language (spell check is enabled when the switch is on the right).





# Chapter 2

## Configuring User Settings and Instance Settings

User Settings Versus Instance Settings	66
Configuring User Settings and Instance Settings	66
Customizing My Work Page	76

## 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

### *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**.

### ***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**.

### ***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 98](#).

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 **General**.
- 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 **General**.
- 3 Select **Enable Propose Change for Non-Current Objects**.

### ***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 295.

### ***Container: Automatic Refresh***

You can choose whether all containers and collections based on queries and scripts should be refreshed by default when they are opened. This may affect performance. If collections based on queries significantly slow performance, you can manually refresh their content as needed as well. For further information, see chapter "[Refreshing the Contents of a Collection](#)" on page 240.

#### **To automatically refresh containers based on queries:**

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

### ***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.

### 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 **General**.
- 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**.

### 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 306.

### **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 **General**.
- 3 At the **Attachment** option, select the box labeled **Disable Automatic Opening**.
- 4 Click **OK**.

### **Text Field**

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

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

The following options are available:

- **Auto Height:** The default behavior
- **Fixed Height:** 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.

## **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 33](#).
- 4 To specify the sort order, see chapter ["Sorting Order List" on page 33](#).
- 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 75](#).

## **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 299](#)).

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 185](#).

## 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 167](#) and ["Formatting Chapters" on page 179](#).

### 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 152](#)). 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.

## 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. #feedd 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 33](#). 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 33](#).
- 4 To specify the sort order, see chapter ["Sorting Order List" on page 33](#).
- 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

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 **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 33](#).
- 4 To specify the sort order, see chapter ["Sorting Order List" on page 33](#).
- 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**.

## Customizing My Work Page



**IMPORTANT!** By default, the My Work page has been disabled. All My Work page views have been transferred to the Dashboard as "My Work" reports. For further information about using the dashboard, see chapter ["Using Dashboards" on page 203](#).

**The instructions of the following section can only be executed if the RM Administrator has enabled the My Work page.**

You can specify up to seven expandable sections to appear on the My Work page. Each section displays the results of a query.



**NOTE** You must have "read" access to run the default scripts and filters that are provided on your My Work page. You must be granted "read" access to all scripts to access the default scripts and filters, because it is not possible to grant access to these scripts and filters specifically. You must also be in a user group that has access to the categories where the scripts exist.

The following prebuilt sections are available.



**NOTE** The **Recent Comments**, **Recently Changed Requirements**, and **Recent Polls** sections are displayed by default.

- **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 timeframe.
- **Recently Changed Requirements** — Shows requirements that have been modified or created by any user within the specified timeframe.
- **Recent Polls** — Shows polls that meet the specified conditions within the specified timeframe.

You can also create custom sections based on the scripts of your choice.

#### To customize the My Work page:

- 1 From the My Work page, click **Customize** in the **Actions** menu. The Customize dialog box opens.
- 2 Select the check box next to each predefined query that you want to include. Clear the check box next to each predefined query that you do not want to include.
- 3 Select a timeframe for each predefined query that you want to include. The default timeframe for these queries is **in the last 14 days**.
- 4 Select the category or categories from which requirements should be included in the query results.

In the **Categories** lists in the predefined queries, click a category to select it. To select all categories that belong to a parent category, select the parent category, press Shift and then click the parent category. To select more than one category, press CTRL and click each category. To deselect a category, press CTRL and click the selected category. If you click a category without pressing CTRL, all other selections are removed.

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 you select more than one category, **(n selected)** is displayed in the list box. If you select only one category, **Category Name** is displayed in the list box.

- 5 For the **Recent Polls** predefined query, select whether the poll state should be active polls, closed polls, or any poll; whether the participants should be you or anyone; and whether the poll was started by you or anyone.
- 6 For each custom section you want to include, do the following:
  - a Type the section title that you want to appear on your My Work page.
  - b Select the category from which you want to select scripts. The number of scripts that exist in each category is displayed in parentheses after the category name in the **Category** list.
  - c Select the script you want to associate with the section.
- 7 For each custom section that you want to remove, select **Choose script** or **Choose category, then script**.
- 8 Click **Save**.

## Chapter 3

---


# Working with Requirements

Requirement Basics	80
Working with Requirements and Change Requests	95
Working with Links	106
Working with Containers	121
Working with File Attachments	124
Working with Group Attributes	125
Viewing Requirement History	127
Merging Requirement Changes	133
Branching and Merging Requirements	135
Polling	142
Participating in Discussions	146

# 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 70](#).



- **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 135.
- 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
  - **System Attributes**
  - **Containers**
- 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 32.



**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 one requirement: TEST\_000003, which contains these values in the **Operating System** attribute:

- Desktop-Windows-7
- Desktop-Windows-XP
- Desktop-Windows-Vista





**NOTE** Quick Search would still find the requirement if it had extra values.

### 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 34 requirements, which 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 49 requirements with the **Operating System** attribute does not have all 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 16 requirements, which 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 103](#).

**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

**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 (\*.xls)
  - 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 267) 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 267) 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 260.

### 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 - <SUBREPORT>  
 4 - <LAYOUT>  
 5 - <COLUMN name="PUID" attrid="26" classid="1">PUID</COLUMN>  
 6 - <COLUMN name="TEXT" attrid="31" classid="1">Baseline 1</COLUMN>  
 7 - <COLUMN name="PUID" attrid="26" classid="1">PUID</COLUMN>  
 8 - <COLUMN name="TEXT" attrid="31" classid="1">Baseline 2  
 Modifications</COLUMN>  
 </LAYOUT>  
 </SCHEMA>  
 <CLASS name="MARKETING\_REQUIREMENTS" id="1">  
 <ATTRIBUTE name="PUID" id="26" type="puid" mandatory="false" editable="false"  
 unique="false" visible="true">  
 <FORMAT>MRKT\_<#></FORMAT>  
 <DISPLAYNAME>Rqmt ID</DISPLAYNAME>  
 </ATTRIBUTE>  
 <ATTRIBUTE name="TEXT" id="31" type="text" mandatory="true" editable="true"  
 unique="false" visible="true">  
 <DEFAULTVALUE>Dummy Text</DEFAULTVALUE>  
 <DISPLAYNAME>Text</DISPLAYNAME>  
 </ATTRIBUTE>  
 </CLASS>  
 </SCHEMA>  
 <requirement class="MARKETING\_REQUIREMENTS" id="1" version="1"  
 puid="MRKT\_000001">  
 <attribute id="PUID">MRKT\_000001</attribute>  
 <attribute id="TEXT">  
 This system shall enable the user to browse an on-line photo album. It  
 shall look and feel just like an electronic photo album.  
 </attribute>  
 </requirement>  
 <LINK name="Marketing\_Requirements\_CHANGE">  
 <requirement class="MARKETING\_REQUIREMENTS" id="8" version="1"  
 puid="MRKT\_000001">  
 <attribute id="PUID">MRKT\_000001</attribute>  
 <attribute id="TEXT">  
 shall look and feel just like an electronic photo album.  
 </attribute>  
 </requirement>  
 </LINK>  
 </requirement>  
 <requirement class="MARKETING\_REQUIREMENTS" id="42" version="1"  
 puid="MRKT\_000001">  
 <attribute id="PUID">MRKT\_000001</attribute>  
 <attribute id="TEXT">  
 The ePhoto system shall enable the user to browse an on-line photo  
 album. It shall look and feel just like an electronic photo album, just  
 like the one on the coffee table.  
 </attribute>  
 </requirement>  
 </LINK>  
 </requirement>  
 <requirement class="MARKETING\_REQUIREMENTS" id="2" version="1"  
 puid="MRKT\_000002">  
 <attribute id="PUID">MRKT\_000002</attribute>  
 <attribute id="TEXT">  
 shall look and feel just like an electronic photo album, just  
 like the one on the coffee table.  
 </attribute>  
 </requirement>  
 </LINK>  
 </requirement>

10

```

</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. <b>NOTE:</b> 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.



Key	Description
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.
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.

## 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 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 <b>Link Requirements</b> dialog. For further information, see chapter <a href="#">"Linking an Existing Requirement" on page 107</a> .
Create New & Link	Opens the <b>New &amp; Link</b> dialog to create a new requirement and link it with the existing requirement.
Browse Links	Opens the <b>Link Browser</b> dialog. For further information, see chapter <a href="#">"Using Link Browser" on page 117</a> .
Add Comment	Puts the requirement into <b>Add a Comment</b> mode (same as clicking <b>Start a new discussion</b> in the <b>Comments</b> section). For further information about comments, see chapter <a href="#">"Participating in Discussions" on page 146</a> .
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 <a href="#">"Submitting a Change Request" on page 104</a> .
Add to Containers	Opens the <b>Add to Containers</b> dialog to add the current requirement to a container. For further information about containers see chapter <a href="#">"Working with Containers" on page 121</a> .
Show direct URL	Opens the Requirement Link dialog which shows the link to the current 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 <b>Print</b> 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 <a href="#">"Viewing Information about a Class" on page 90</a> .
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, click **Get Help for this Class**.  
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 127](#).

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.

## 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 133](#).

This configuration is set through the Instance Settings dialog, which is available only to administrators. For further information, see chapter ["Concurrent Editing" on page 66](#).

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 299). 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 Change History** section.



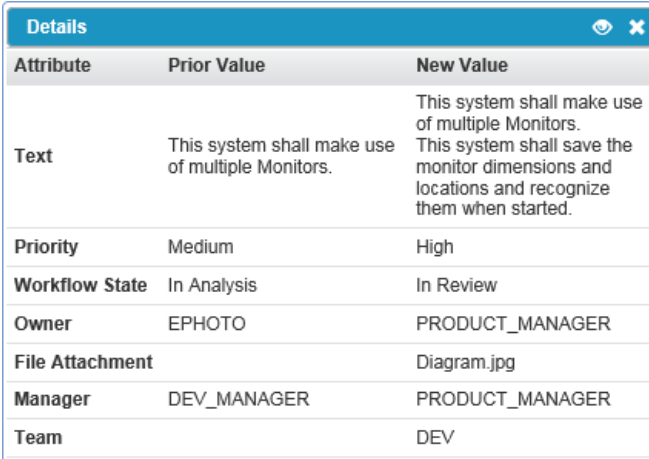
**Figure 3-1. State Change History**

**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.



Attribute	Prior Value	New Value
Text	This system shall make use of multiple Monitors.	This system shall make use of multiple Monitors. This system shall save the monitor dimensions and locations and recognize them when started.
Priority	Medium	High
Workflow State	In Analysis	In Review
Owner	EPHOTO	PRODUCT_MANAGER
File Attachment		Diagram.jpg
Manager	DEV_MANAGER	PRODUCT_MANAGER
Team		DEV

**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 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 99](#).
- 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 80](#).
- 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 99](#).
- 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 99](#).
- 2 Expand the **History** section of the Edit Attributes dialog.

» LINKS			
» HISTORY			
Pedigree		Properties Differences	
	TIME MODIFIED	MODIFIED BY	CURRENT STATUS
1	18-MAY-2006@08:59:35	Ryan Forbes	Replaced (Baselined)
2	30-SEP-2015@01:41:48	Ryan Forbes	Current
» POLLS			

- 3 Right-click the link  icon next to the version that you want.
- 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.

## 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 98](#).



**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 282](#)). To use an existing product with agile, see chapter ["Manual Product Assignment" on page 283](#).

- 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 125](#).
- **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 34](#).

- 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 238](#), 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 99](#).
  - **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 80](#).
- 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 99](#)).
- 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 201](#).
- 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 99](#)).
- 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 Select **Propose New** from the Requirements set of the Actions pane. The *Propose New Requirement* 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.

- 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 125](#).
- **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 34](#).

- 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 **Reason for change:** Enter the reason you want to create a new requirement.
- 7 **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.

- 8 **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.
- 9 **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.
- 10 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 116](#) and ["Inherited Containers" on page 122](#).

## 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 28](#).

**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 125](#).
- **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 34](#).

- 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 124](#).
- 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 146](#).
- 6 **Container:** To add/remove the requirement to/from a collection, expand the Container section. See chapter ["Working with Containers" on page 121](#).
- 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 106](#).



**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 142](#).

- 11 **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.
- 12 **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.
- 13 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 95](#)).



**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.
  - **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.



**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 172](#).

## 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 131](#)).

### 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 99](#).
- 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 98](#).

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 a triangle icon .



- 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 98](#).

- 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 116](#) and ["Inherited Containers" on page 122](#).

## 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 172](#).

- 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:


	<b>Browse Links:</b> Opens the Link Browser dialog. For details, see chapter <a href="#">"Using Link Browser" on page 117</a> .
	<b>Suspect History:</b> Opens the Suspect History dialog. For details, see chapter <a href="#">"Using the Suspect History" on page 115</a> .

	<b>Expand:</b> Expands all link sections. This function is not available when using Quick View.
	<b>Collapse:</b> Collapses all link sections. This function is not available when using Quick View.
	<b>Quick View:</b> 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.
	<b>Extended View:</b> 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.
	<b>Clear all suspicious links:</b> Clears all suspicious links. For details, see chapter <a href="#">"Clearing Suspect Links" on page 115</a> .
	<b>Properties:</b> Opens the <i>Link Properties</i> dialog. For details see chapter <a href="#">"Link Properties" on page 112</a> .
	<b>Link Existing:</b> 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.
	<b>Create New &amp; Link:</b> 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.
	<b>Propose New &amp; Link:</b> 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.
	<b>Delete Link:</b> 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.
	<b>Remove Link:</b> 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.  <b>CAUTION!</b> You cannot restore a removed link.
	<b>Undelete Link:</b> 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 <a href="#">"Link Properties" on page 112</a> .
	<b>Raise Suspicion:</b> Makes a linked required 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 <a href="#">"Suspect Links" on page 113</a> .
	<b>Resolve Suspicion:</b> 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 <a href="#">"Suspect Links" on page 113</a> .

## 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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 6 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 48](#).
- 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 32](#).
- 12 Click on **Add Link**.

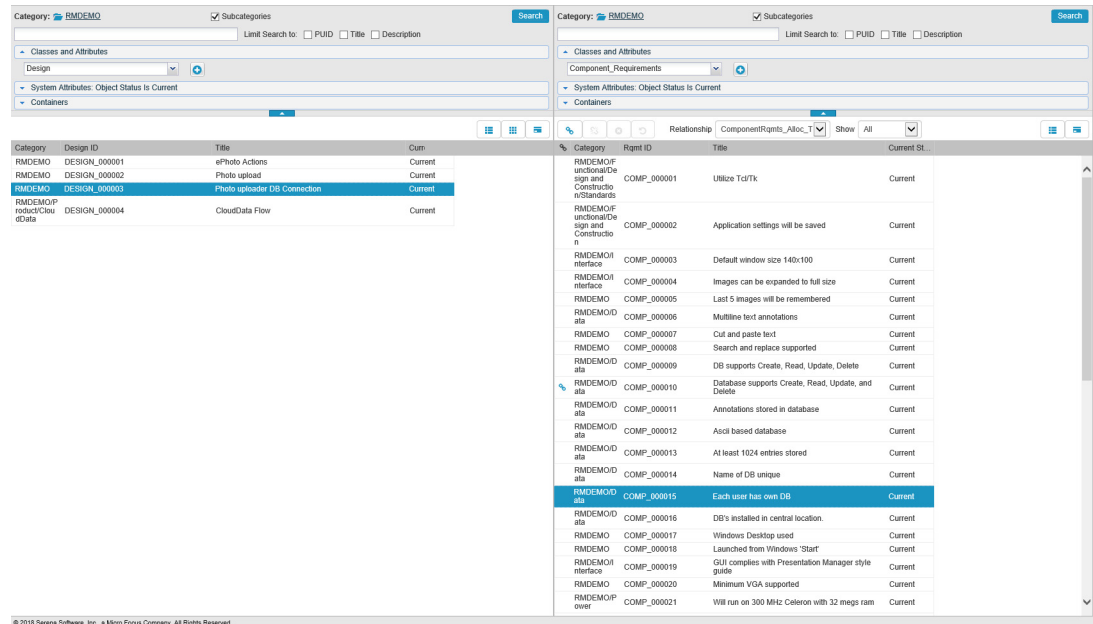
## Linking Existing Requirements through Quick Search

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 85](#).

**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.



**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.

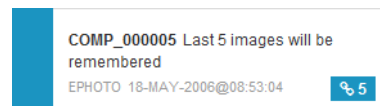


**Matrix View:** Shows requirement links in a table as rows and columns.



**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 112](#).

#### 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 113](#).

### 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 33](#).
- **Sorting Order:** To specify the sort order, see chapter ["Sorting Order List" on page 33](#).
- **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.



## Suspect Links

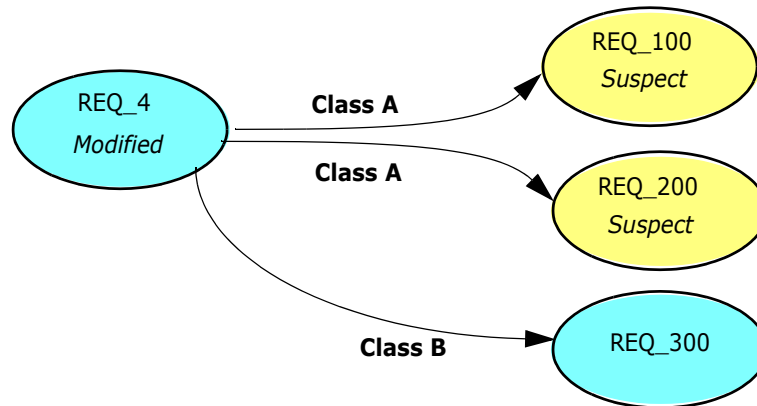
After relationships exist between requirements, it is possible for changes in one requirement to affect other requirements. If you are working in a team, you need to know whether a change to a related requirement has possibly rendered other requirements questionable, or "suspect."

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.

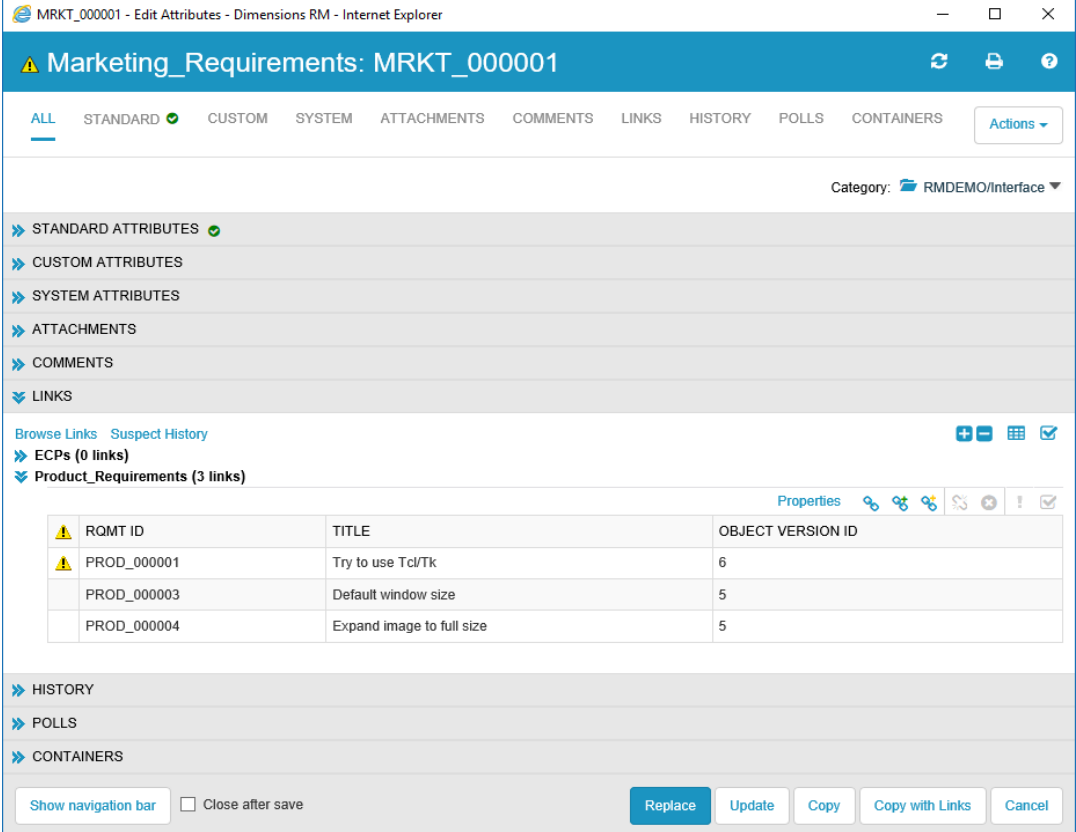


### Identifying Suspect Links

#### 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 115.



MRKT\_000001 - Edit Attributes - Dimensions RM - Internet Explorer

Marketing\_Requirements: MRKT\_000001

ALL STANDARD CUSTOM SYSTEM ATTACHMENTS COMMENTS LINKS HISTORY POLLS CONTAINERS Actions

Category: RMDemo/Interface

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
PROD_000001	Try to use Tcl/Tk	6
PROD_000003	Default window size	5
PROD_000004	Expand image to full size	5

HISTORY  
POLLS  
CONTAINERS

Show navigation bar ☐ Close after save


Replace Update Copy Copy with Links Cancel

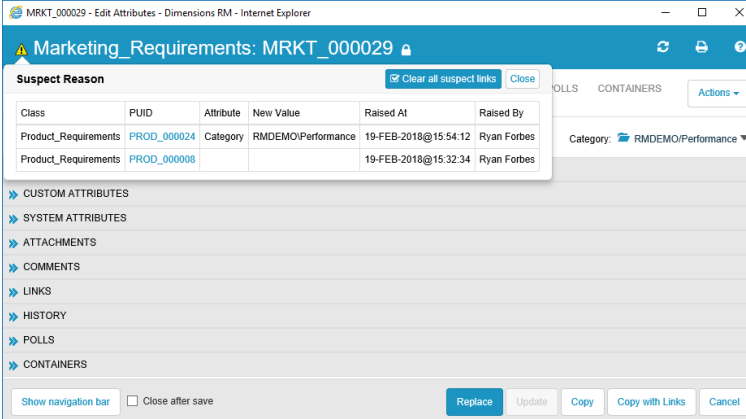
- 3 Expand the **Links** section.
- 4 Look at each suspect requirement and examine whether the change affects the requirement.
- 5 Change the requirement if the change affects it, or clear the suspect link if it does not affect the requirement.



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







Class	PUID	Attribute	New Value	Raised At	Raised By
Product_Requirements	PROD_000024	Category	RMDemo/Performance	19-FEB-2018@15:54:12	Ryan Forbes
Product_Requirements	PROD_000008			19-FEB-2018@15:32:34	Ryan Forbes

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 115.
  - 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.

## Using the Suspect History

Whenever a suspect link is cleared, 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.
Cleared Version	Shows either "Current" or the object ID of the requirement you are editing. To show only the history for the linked requirements of the version you are editing, select <b>Show only this version</b> .
Cleared At	Shows the date and time the suspect was cleared.
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.
Reason	Describes why the suspect status was cleared. <ul style="list-style-type: none"><li>■ <b>Manual:</b> The user shown under <b>Cleared By</b> cleared the suspect status manually.</li><li>■ <b>Replaced:</b> The user shown under <b>Cleared By</b> cleared the suspect status by replacing the requirement with a new version.</li></ul>

## 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\_000042

Product: [cPhoto] CloudPhoto  
Category: RMDEMO/Product/CloudPhoto

STANDARD ATTRIBUTES  
CUSTOM ATTRIBUTES  
SYSTEM ATTRIBUTES  
ATTACHMENTS  
COMMENTS  
LINKS


Browse Links Suspect History  
ECPs (0 links)  
Product\_Requirements (1 link)

RQMT ID	TITLE	OBJECT VERSION ID
PROD_000031	Search facilities	3

HISTORY  
POLLS  
CONTAINERS  
USED IN PROJECT

☐ Close after save

Replace Update Copy Copy with Links Cancel

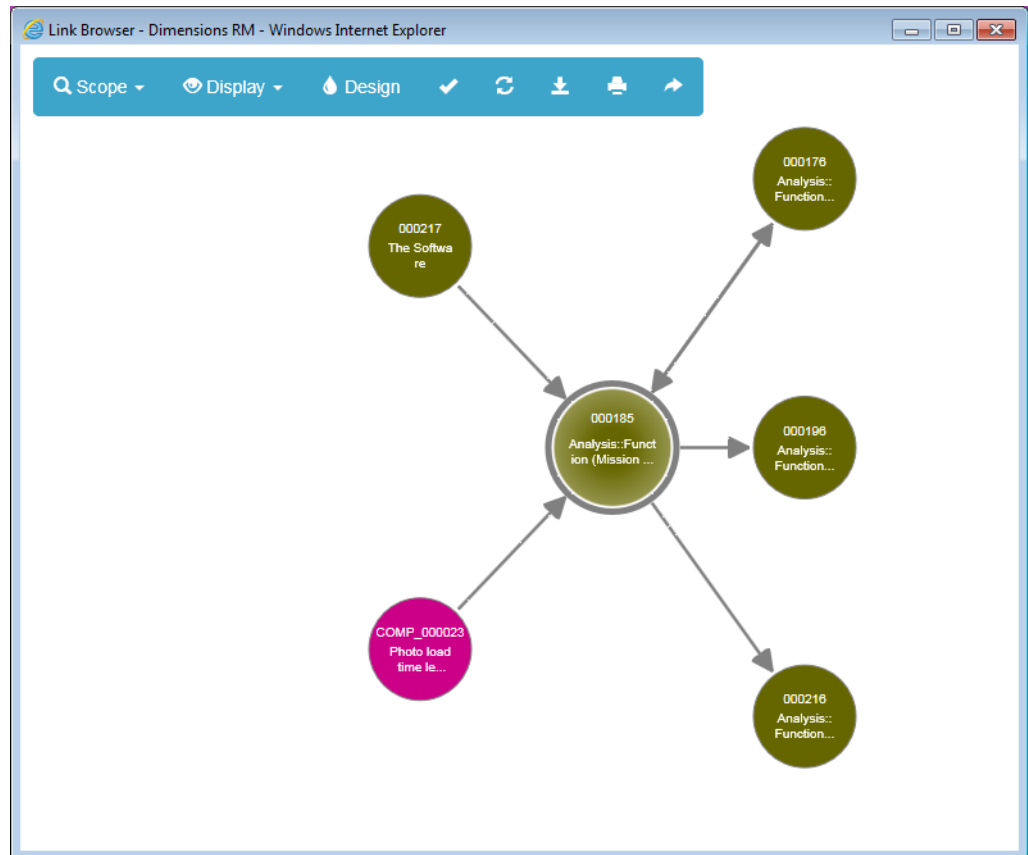
- 2 Expand the **Links** section.
- 3 Open a class which has links.
- 4 Inherited links are marked by .



**NOTE** When making a proposal, also the collections of the original requirement are inherited. For further information, see chapter "[Inherited Containers](#)" on page 122.

## 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 74.



**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.



**Download:** 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.




**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 238](#).

The **Container** section offers these functions:

	<b>Properties:</b> Opens the <i>Container Properties</i> dialog. For details see chapter <a href="#">"Container Properties" on page 123</a> .
	<b>Add to Containers:</b> 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.
	<b>Remove from Containers:</b> 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.
	<b>Open Container:</b> 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.

	<b>Ascending order:</b> The entries are sorted by the values of the marked column in ascending order (0...9, A...Z).
	<b>Descending order:</b> 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 106](#).




**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

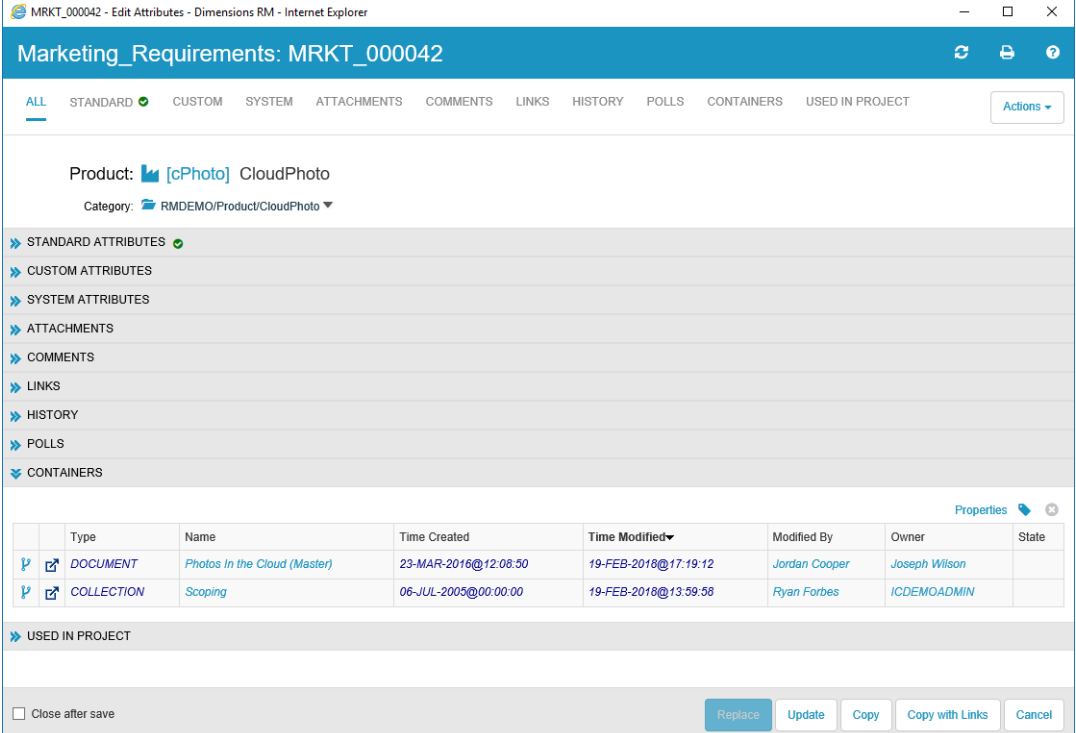
- 1 Open the *Edit Attributes* dialog for a requirement.
- 2 Expand the **Container** section.
- 3 Click  next to the container you want to open.

## 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\_000042

Product:  [cPhoto] CloudPhoto  
Category:  RMDEMO/Product/CloudPhoto

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


Type	Name	Time Created	Time Modified	Modified By	Owner	State
 DOCUMENT	Photos In the Cloud (Master)	23-MAR-2016@12:08:50	19-FEB-2018@17:19:12	Jordan Cooper	Joseph Wilson	
 COLLECTION	Scoping	06-JUL-2005@00:00:00	19-FEB-2018@13:59:58	Ryan Forbes	ICDEMOADMIN	

USED IN PROJECT

☐ Close after save

Replace Update Copy Copy with Links Cancel

- 2 Expand the **Container** section.

- 3 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 116](#).



## Container Properties

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


### To add columns:

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

### To specify column order:

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

### To remove columns:

- 1 Select one or more columns in the right-hand list.
- 2 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 ["Baselining a Collection" on page 241](#).

### To add requirements to an existing collection:

- 1 Select one or several requirements in a work pane.
- 2 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**.

## 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 **File Attachments** section on the **Edit Attributes** dialog box. Each file attachment attribute holds only one file attachment.



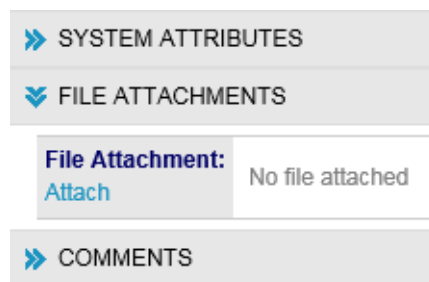
**TIP** To attach multiple files to a single file attachment attribute, store the files in a single zip file and attach the zip file to the attribute.



**NOTE** Before file attachment lines appear in the **File 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 **File Attachments** section on the **Edit Attributes** dialog box.



- 3 Do any of the following:
  - **Attach:** Click this link 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**.
  - **Replace:** Click this link 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**.
  - **Delete:** Click this link to detach the file from the requirement.

- **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 95).



**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.

TEST\_000001 - Edit Attributes - Dimensions RM - Internet Explorer

Tests: TEST\_000001

ALL STANDARD CUSTOM SYSTEM LINKS HISTORY CONTAINERS

Category: RMDemo

STANDARD ATTRIBUTES

CUSTOM ATTRIBUTES

Attachment: Designer: Engineer 1

Estimated DevTime: 0 Execution Date:

Execution Status: Passed

Operating System:

Platform	Family	Version
Desktop	Windows	XP
Desktop	Windows	7

Planned Execution Date: 08/28/2001

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



**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	
		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			

Clicking  (preceding a history entry), opens the history details dialog between the current and the selected item.

Details  		
Attribute	Prior Value	New Value
Text	This system shall make use of multiple Monitors.	This system shall make use of multiple Monitors. This system shall save the monitor dimensions and locations and recognize them when started.
Priority	Medium	High
Workflow State	Proposed	In Review
Owner	DEV_MANAGER	PRODUCT_MANAGER
File Attachment		Diagram.jpg
Manager	DEV_MANAGER	PRODUCT_MANAGER
Team		DEV

**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	
	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 - Dimensions RM - Internet Explorer

History Differences for Component\_Requirements: COMP\_000020

Category: RMDEMO

**STANDARD ATTRIBUTES**

Rqmt ID: COMP\_000020 Title: Minimum VGA supported

Text: It is suggested that a minimum configuration for the users screen is 256 color VGA - this actually comes from using Tcl/Tk. For best results SVGA is recommended.

**CUSTOM ATTRIBUTES**

**SYSTEM ATTRIBUTES**

Created By: ~~Ryan Forbes~~ Carter Benton Current Status: ~~Current~~ Replaced

Initial Created By: Carter Benton Modified By: Ryan Forbes

Object ID: 9824 Object Version ID: 24

Requirement Link: [http://supportvmbblank.8080/htmBrowser/?d=RTM&p=RMDEMO&f=2&c=7&id=COMP\\_000020](http://supportvmbblank.8080/htmBrowser/?d=RTM&p=RMDEMO&f=2&c=7&id=COMP_000020) Suspect: No

Time Created: 30-SEP-2015@01:41:48 08-NOV-2004@23:54:46 Time Modified: 30-SEP-2015@01:41:48 18-MAY-2006@08:59:35

**FILE ATTACHMENTS**

File Attachment: No file attached

**LINKS**

Design (0 links)

Product\_Requirements (1 link)

Tests (1 link)

OK

Note the following points:

- 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 33](#).
- 4 To specify the sort order, see chapter ["Sorting Order List" on page 33](#).

## 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	
	TIME MODIFIED	MODIFIED BY	CURRENT STATUS
  	18-MAY-2006@09:17:06	EPHOTO	Replaced
  	25-NOV-2014@08:23:23	EPHOTO	Replaced
	30-SEP-2015@01:54:24	EPHOTO	Current
Polls			

- 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 requirement in these document(s):

<input type="checkbox"/>	Name	Time Created	Time Modified	Modified By
<input checked="" type="checkbox"/>	ePhoto Tablet Requirements	02-AUG-2016@12:47:32	02-AUG-2016@12:49:01	JOE

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

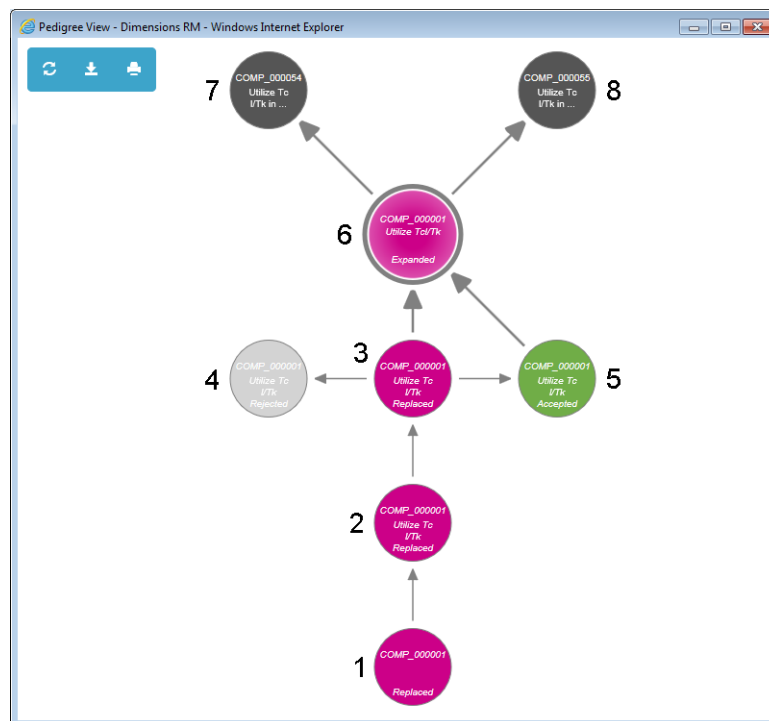
Pedigree View is a graphical representation of the history of a requirement.

**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.

**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 102](#).

**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 91](#).

This configuration is set in the **Instance Settings** dialog. See ["Configuring Instance Settings" on page 306](#).

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"> <li>Accept the change the second user made</li> <li>Accept the change the first user made</li> <li>Accept the original value</li> <li>Combine the changes manually by editing the value directly in the main part of the dialog box</li> </ul>

The following scenario summarizes the actions that lead to requirement merging.

- Two users edit a requirement at the same time.
- The first user clicks **Replace** on the **Edit Attributes** dialog box. The requirement is replaced and the **Edit Attributes** dialog box closes.
- The second user clicks **Replace** on the **Edit Attributes** dialog box.
- 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.
- 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 135 and "Merging Changes" on page 135.

## 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.

Merge Attributes - Dimensions RM - Internet Explorer

Component\_Requirements: COMP\_000024

● Edit attributes ○ Add a comment ○ Propose a change Get Help for this Class

**Changed Attributes**

ATTRIBUTE	CHANGES BY MARY	CHANGES BY JOE	MERGE STATUS
Text	None	This effort shall be undertaken using the Tcl/Tk scripting language. This ensures rapid prototyping and high portability. Tcl/Tk currently runs on: Windows 3.11, Windows 95, Windows NT-, <a href="#">Windows XP</a> and various UNIX flavors.	Automatic
Verification Level	<a href="#">Module</a>	<a href="#">Component</a>	Conflict
Verification Method	<a href="#">Inspection</a>	<a href="#">Analysis</a>	Conflict

**CUSTOM ATTRIBUTES**

Component Manager: [Ryan Forbes](#)

Dev Effort: 20

Test Effort: 2

Verification Level:

Show navigation bar ☐ 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.

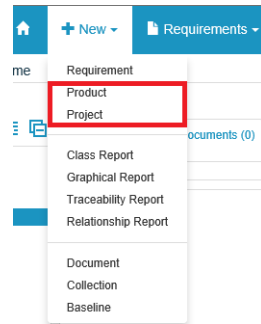
**To merge changes:**

- 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

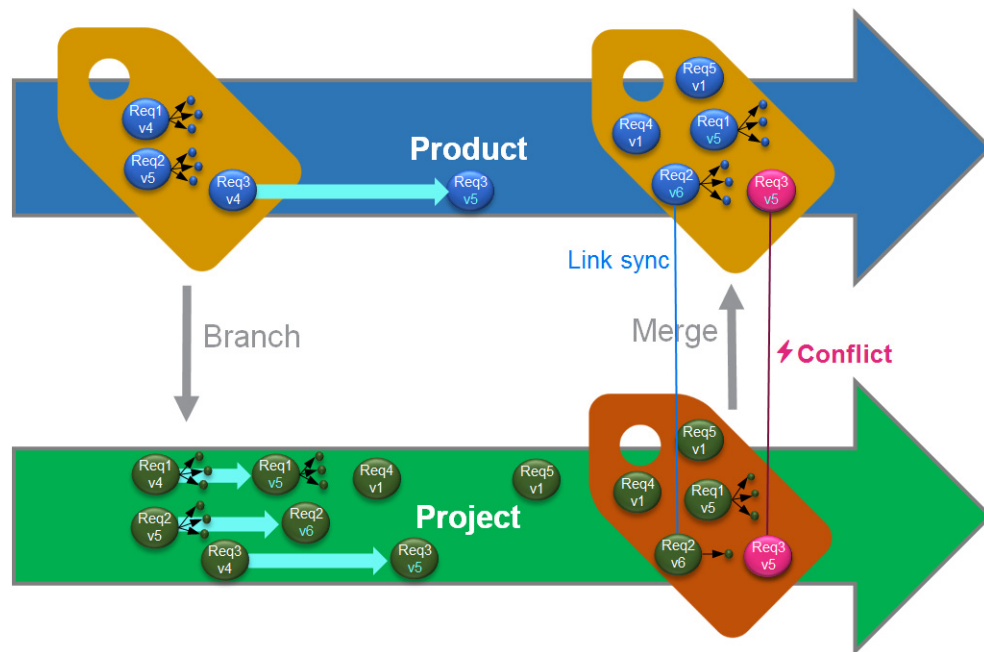
If your administrator created the Product and Project classes, you can use the branching and merging functionality for requirements. Note that the classes are not necessarily named "Product" and "Project". However, for simplicity, this guide uses the names "Product" and "Project". To verify if the Product 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.
- 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 121](#).
- 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 99](#).
  - **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.
- 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 121](#).
- 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 99](#).
  - **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 28](#).

**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 137](#).

## 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 28](#).

**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 138](#).

## 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 70](#)).

- 1 Open the requirement for editing (see chapter ["Editing a Requirement" on page 99](#)).
- 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

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 142).

### 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 80.
- 6 Click **Search**.
- 7 Select the requirements you wish to branch.
- 8 Click **Provide**.

- 9 On the success message, 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 99](#)).
- 2 Expand the **Used in Project** section.
  - **Product**: Select the *Project* 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 141](#).

### *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 80](#).
- 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 141](#).

## 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.

## 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\_000017**

**GENERAL** PARTICIPANTS

**Title:** Documentation

**Question:** What documentation should be included in this package?




**Answers:**

- Getting Started Guide
- Online Help
- Tutorial

**Response deadline:** No deadline

Start Cancel

- 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>

ADMINISTRATION

BUSINESS\_ANALYST

DEV

DEV\_MANAGER

DEVELOPMENT

↑

↓

**Users:**

JOE

MARY

→

←

**Members of group All Users:**  
 ADMINISTRATION; BUSINESS\_ANALYST; DEV; DEV\_MANAGER; DEVELOPMENT; ENGINEERING;  
 EPHOTO; EPHOTO\_INFO; JOE; MANAGEMENT; MARKETING; MARY; PRODUCT\_MANAGER;  
 PROJECT\_MANAGER; QA; RTMADMIN; SALES; SUPPORT; TECH\_PUBS; TEST; TEST\_MANAGER;  
 TRAINING

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

You can start a discussion by adding a comment to a requirement or you can reply to comments that are already part of a discussion. There are two ways you can view discussions: date view and subject view.



**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.

## Adding a Comment from the Menu Bar

**To add a comment from the menu bar:**

- 1 Selecting the desired requirement in a work pane, e.g. Quick Search.
- 2 In the **Requirements** set of the **Actions** pane, click **Add Comment**. This opens the **Add a Comment** dialog.
- 3 Type a title for the comment in the **Subject** box.
- 4 Type the comment in the **Comment** box. There is no practical limit to the number of characters.
- 5 Select your role from the **Role** list to indicate your perspective in creating the comment. An administrator can configure this dialog box to omit the **Role** menu.
- 6 Click **Add** or **Add & Close**.

## Adding a Comment from a Discussion

**To add a comment from within a discussion:**

- 1 In the Add a Comment dialog box or in the Edit Attributes dialog box for a requirement, do one of the following:
- 2 Click **Start a new discussion** at the top of the **Comments** section.
  - Click **Reply** at the bottom of a comment.

The **Add a comment** action becomes active, and the dialog box expands to include a comments section.
- 3 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 Type the comment in the **Comment** box. There is no practical limit to the number of characters.
- 5 Select your role from the **Role** list to indicate your perspective in creating the comment. An administrator can configure this dialog box to omit the **Role** menu.
- 6 Click **Add** or **Add & Close**.

## Changing the Discussion View

**To change the discussion view:**

Click **Group by Subject** or **Group by Date** at the top right portion of the **Comments** section.



## Chapter 4

---

# Working with Documents

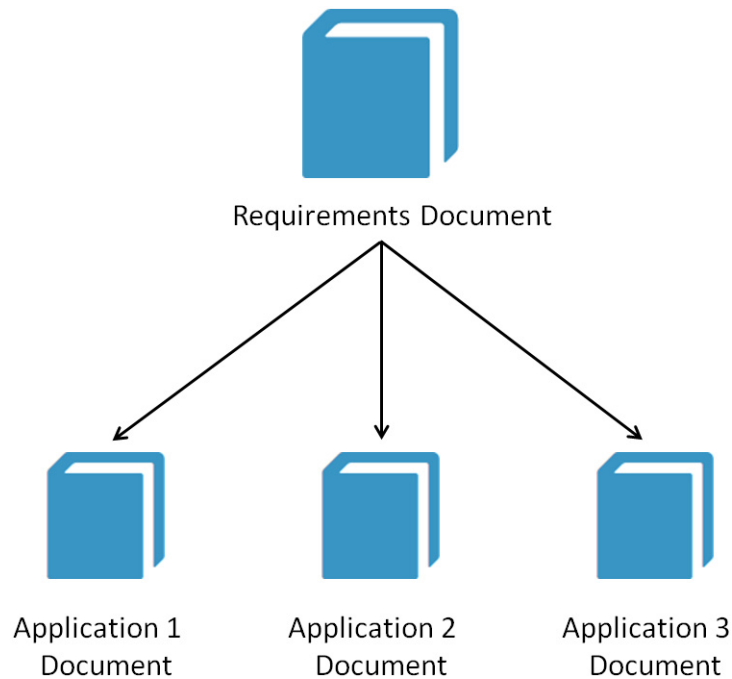
About Documents	150
Document Basics	151
Working with Documents	162
Working with Chapters and Requirements	175
Working with Comments	188
Working with Snapshots	190
Publishing Documents	193
Using Workflows with Documents	199

## 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.

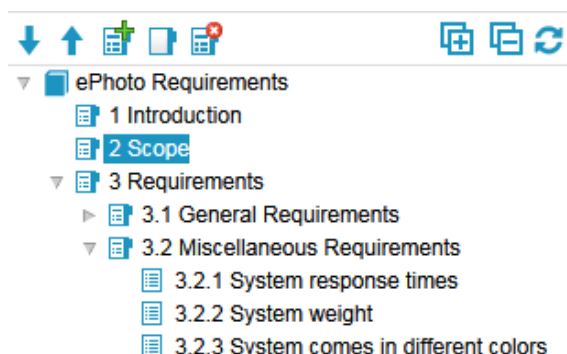
### Master and Child Documents

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 172](#).
-  **Format chapter:** This button invokes the Format Chapter dialog where you can configure how the chapter is displayed in the Details pane and when published. See ["Working with Snapshots" on page 190](#).
-  **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 178](#).
-  **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 is 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:




-  **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 55](#).
-  **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 155](#).
-  **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 155](#).
-  **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 158](#).
-  **Print:** This button invokes your system's Print dialog to print the current contents of the Details pane. See ["Printing" on page 157](#).
-  **Edit:** This button invokes the Edit Chapter dialog or the Edit Document dialog, depending on what is currently selected in the Navigation pane. See ["Editing a Chapter" on page 177](#) and ["Editing Document Attributes" on page 166](#).
-  **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.

For further information on document changes, see chapter ["Working with Document Changes" on page 158](#).

## Paragraph Layout



 **3.2 Miscellaneous Requirements**

Requirements
Layout: Editable Grid | Grid | Paragraph

**3.2.1 System response times**

Rqmt ID: MRKT\_000029 Priority: High Time Modified: 30-SEP-2015@1:54:24

The system response time shall not be greater than 3 seconds for 80 percent of the transactions.

**3.2.2 System weight**

Rqmt ID: MRKT\_000030 Priority: High Time Modified: 30-SEP-2015@1:54:24

The system shall weigh less than 8 pounds.

**3.2.3 System comes in different colors**

Rqmt ID: MRKT\_000031 Priority: High Time Modified: 30-SEP-2015@1:54:24

The system shall be available in a variety of colors.

Paragraph Layout provides all functions from the list on [page 152](#).

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: <a href="#">Editable Grid</a>   <a href="#">Grid</a>   <a href="#">Paragraph</a>
	#▲	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 152](#) 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


<div><input type="checkbox"/></div> <div></div> <div>#</div>	Rqmt ID	<div></div> <div>Title</div>	<div></div> <div>Text</div>	Priority	<div></div> <div>Time M...</div>
<div><input type="checkbox"/></div> <div></div> <div>3.2.1</div>	MRKT_000029	<div></div> <div>System response times</div>	The system response time shall not be greater than 3 seconds for 80 percent of the transactions.	High	30-Sep-2015@01:54:24
<div><input type="checkbox"/></div> <div></div> <div>3.2.2</div>	MRKT_000030	<div></div> <div>System weight</div>	The system shall weigh less than 8 pounds.	High	30-Sep-2015@01:54:24
<div><input type="checkbox"/></div> <div></div> <div>3.2.3</div>	MRKT_000031	<div></div> <div>System comes in different colors</div>	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 152](#) 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


 FILE ATTACHMENTS

 COMMENTS

 LINKS

 HISTORY

 POLLS

 CONTAINER

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 104](#).
- **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 99](#).
- **Print:** This button invokes your system's Print dialog to print the current contents of the Details pane. See ["Printing" on page 157](#).



**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 73](#)) or by clicking  or  in the Detail Pane (see chapter ["Detail Pane" on page 152](#)).

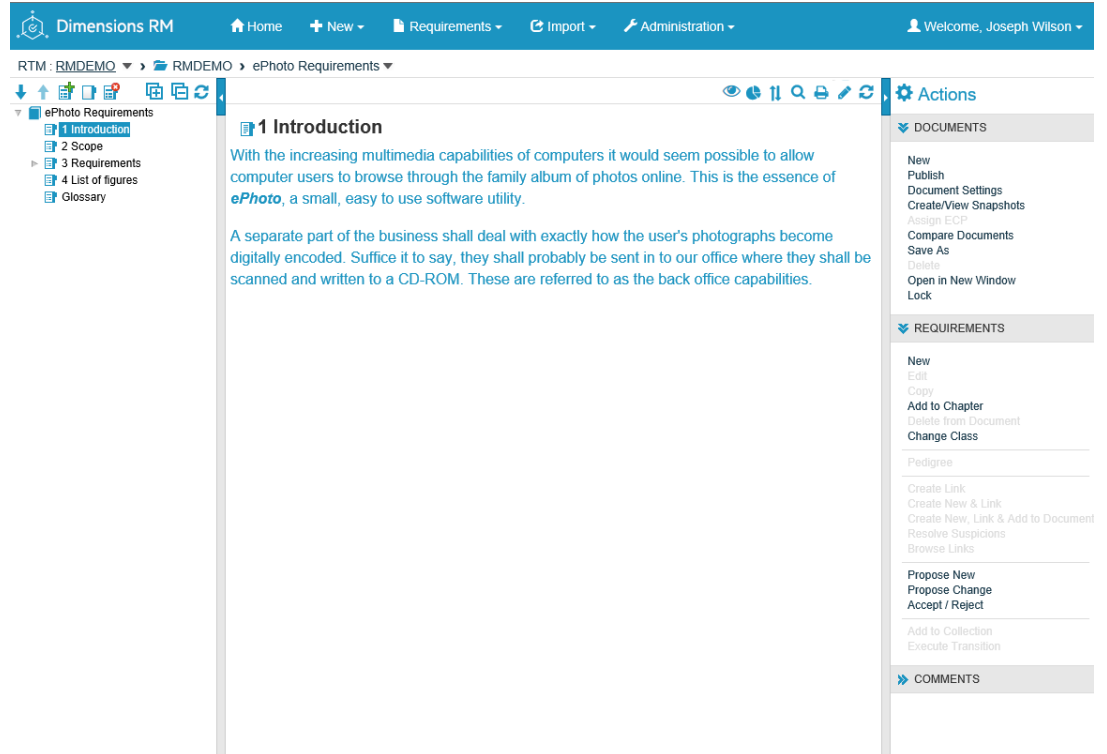


Figure 4-1. Document View Mode: Chapter

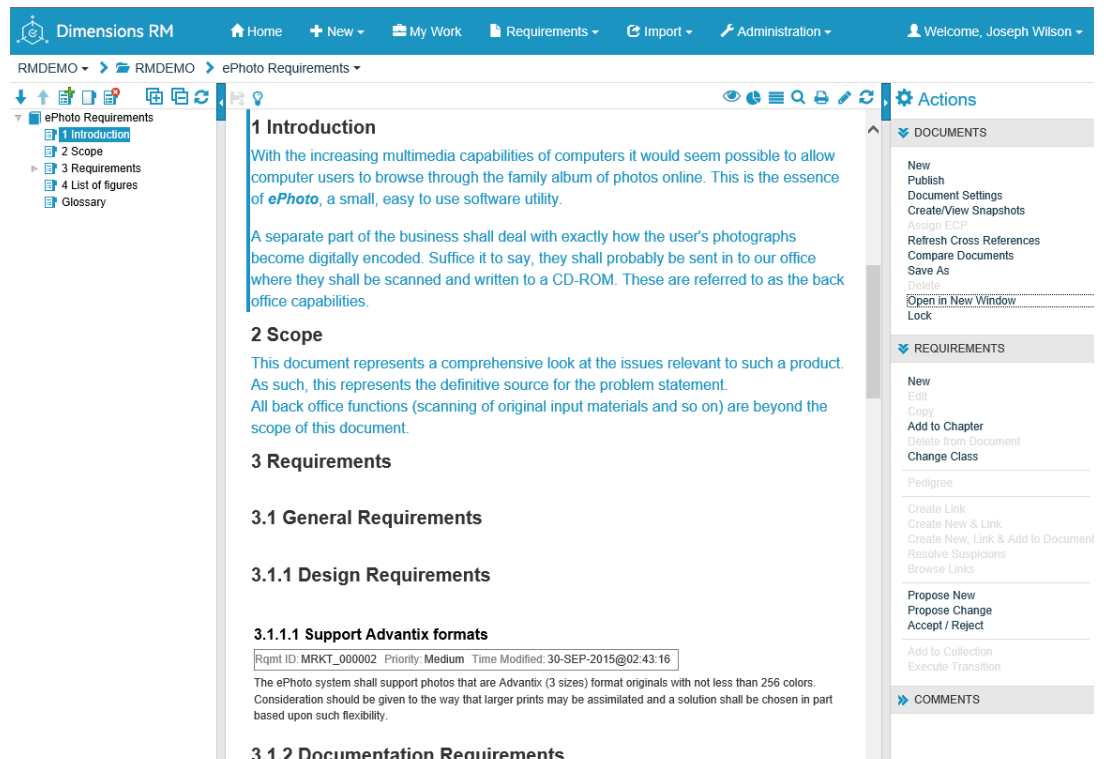


Figure 4-2. Document View Mode: Entire Document

## 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:

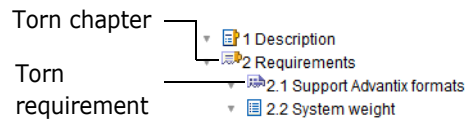
- 1 Click **Open in New Window** from the Documents group in the Actions pane. The document or snapshot opens in a new browser window.

## 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 a user opens a document that has been modified since the last visit, a message shows up that the document has changed. The user 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. To filter the contents of the table, enter text into one or several boxes on the first line of the table. The modified chapter can be opened by clicking the related entry in the table. Also note that the modified chapters 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

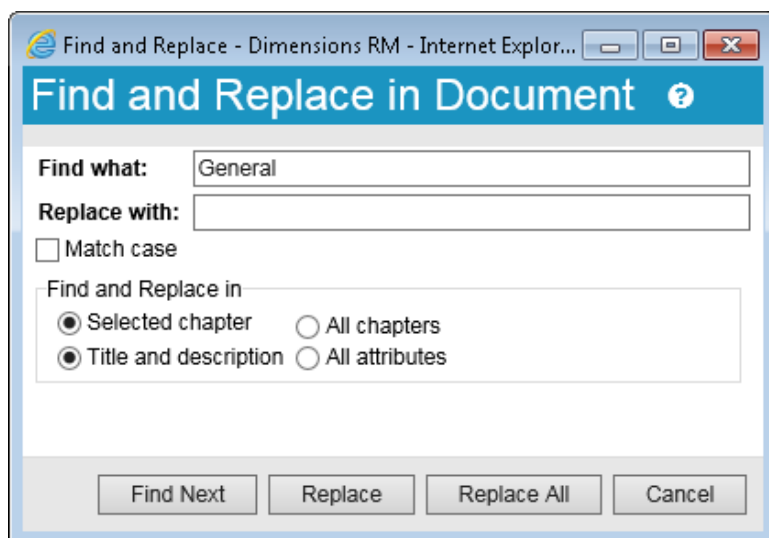


#### NOTE

- The **Find and Replace** menu item is disabled while you are comparing a document and its snapshot (see ["Comparing Documents and Snapshots" on page 191](#)).
- 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.

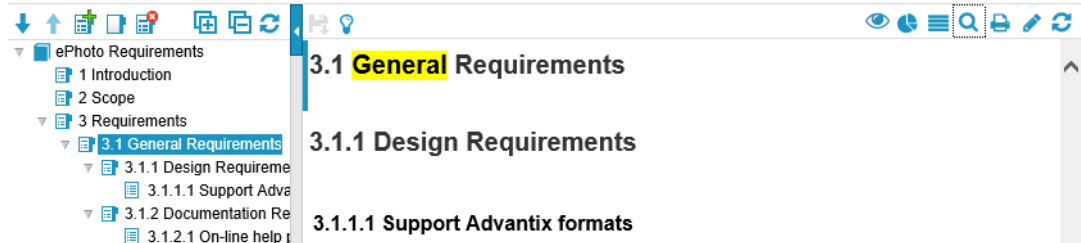
#### To find and replace character strings:

- 1 Open the document to the Document work page, if it is not already open. See ["Open the Home View by clicking ." on page 157](#).
- 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 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 201](#).
- 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 209](#)).
- 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 201](#).
- 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 157](#).
- 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 Open Document dialog. The text may be truncated in the Description column of

this dialog; however, it is shown in its entirety in the tooltip that appears when you hover your mouse over the description.



#### 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 **Publish Title:** Select to use the string in the **Name** field as the document's title when publishing to Word.
- 5 **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 184](#).

- 6 **ECP Controlled:** Enable this checkbox 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 172](#).

- 7 **Master Document:** Select this option to make the document a master document.
- 8 **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 34](#)). It is updated when a document is opened or reloaded.
- 9 **Category:** Select the category to which to add the new document. A document can belong to any category to which you have access.
- 10 **Create Options:** Select one of the following:
  - **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.

- **Chapters Only:** Creates the document based upon the chapter structure of an existing document that you select from the Template list.
- **Chapters and Requirements:** Creates the document based upon the chapter structure and requirements of an existing document that you select from the Template list.
- **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.
- **As Child:** Shows a list of master documents to which this newly created child document should relate to.
- **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.

- 11 **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 172](#).

- 12 **Foreword tab:** Click in the **Foreword** field. The HTML Toolbar appears. Enter any information that would precede the table of contents.



**NOTE** The **Foreword** tab is enabled only if you choose **Blank** from Create Options.

- 13 **System Attributes tab:** As needed, modify the system attributes for the document, such as the **Owner** and **Approval Status**.

- 14 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 157](#).
- 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.


- **Edit Document:** Allows you to change document name and description, the foreword and other settings which define the document. For further information, see chapter ["Editing Document Attributes" on page 166](#).
- **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 167](#).

- **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 169](#).
- **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 170](#).
- **Dependencies:** Shows the dependencies between a master document and a child document. For further information, see chapter ["Document Dependencies" on page 171](#).

### **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 157](#).
- 2 Click  at the top of the Detail 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.
  - **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 184](#).

- **ECP Controlled:** Enable this checkbox 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 172](#).

- **Foreword:** Edit the foreword of the document.



**TIP** When you click in the field, formatting controls will appear.

- **Approval Status:** Select **approved** or **unapproved**.

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 157](#).
- 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"

EDIT DOCUMENT   **FORMAT DOCUMENT**   DISPLAY OPTIONS   RESTRICT CLASSES   DEPENDENCIES

---

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 Requirement Template

---

Document Numbering  
☐ Separate chapters and requirements numbering  
 Format string:

---

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 To change the **Requirement Layout**, select the **Grid** or **Paragraph** layout option.



**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.

- 5 To change which attribute labels are shown in the Detail pane and in the published document, select or deselect the check boxes for **<Default Title>** and **<Default Description>**.
- 6 **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.
- 7 To use a custom template to publish the document, select a template from the **Publish Requirement Templates** 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.

- 8 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



String	Example Results
^##	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  <b>NOTE</b> 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.

- 9 Click **OK**.



**TIP** Click the **Refresh** button to see changes to numbering take effect on the work page.

## Document Tree Options

On the **Format Document** tab of the **Document Settings** dialog, 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.

## 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 157](#).

- 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"

EDIT DOCUMENT   FORMAT DOCUMENT   **DISPLAY OPTIONS**   RESTRICT CLASSES   DEPENDENCIES

Choose a class:

- Approval
- Component\_Requirements
- Defects
- Design
- ECPs
- Marketing\_Requirements**
- Product
- Product\_Requirements
- Project
- Tests

**ATTRIBUTES TO DISPLAY**

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

Rqmt ID  
Title  
Text  
Priority  
Time Modified

**ATTRIBUTES TO DISPLAY IN THE TREE**

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

Title

**ATTRIBUTES TO DISPLAY IN THE TOOLTIP**

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

**OPTIONS**

Separator: .   Display Length for Text attributes: 50

Edit chapter attributes...   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 33](#).
- 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 33](#).
- 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 33](#).



**NOTE** Optionally, change 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.

- 8 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 157](#).

- 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 157](#).
- 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 34.



**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"> <li>■ Accept the change the second user made</li> <li>■ Accept the change the first user made</li> <li>■ Accept the original value</li> <li>■ Combine the changes manually by editing the value directly in the main part of the dialog</li> </ul>

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 174](#) and ["Merging the Changes" on page 175](#).

## 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.

Merge Attributes - Dimensions RM - Internet Explorer

Component\_Requirements: COMP\_000024

● Edit attributes ○ Add a comment ○ Propose a change [Get Help for this Class](#)

**Changed Attributes**

ATTRIBUTE	CHANGES BY MARY	CHANGES BY JOE	MERGE STATUS
Text	None	This effort shall be undertaken using the Tcl/Tk scripting language. This ensures rapid prototyping and high portability. Tcl/Tk currently runs on: Windows 3.11, Windows 95, Windows NT-, <a href="#">Windows XP</a> and various UNIX flavors.	Automatic
Verification Level	Module	Component	Conflict
Verification Method	Inspection	Analysis	Conflict

**CUSTOM ATTRIBUTES**

Component Manager:

Dev Effort:

Test Effort:

Verification Level:  System  
Subsystem  
Component  
Module

Show navigation bar ☐ Close after save

Mary made the first change when she changed "Requirements" to "Requirement Document" in the *Name* attribute. 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 to the left of the *Name* attribute box in the main part of the dialog box.

The second change involves a conflict. In the second change, Mary 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 you can populate the chapter based on the requirements returned by a query. In the case of a query, it can be a one time operation or the chapter can be linked to the query and be 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 157](#).

- 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 populate the content of the chapter based on a specific query, select the **Based on Query** option. You can then select the query to use as the basis of the chapter's content. This may be a class report, relationship report, or traceability report.



**NOTE** If the query returns multiple versions or non-current versions of a requirement, they will be included in the document. Prior to RM 11.2.2, only the Current version would be included.

- Optionally choose the **Update chapter when script is updated** checkbox to dynamically refresh the content in the chapter when the query is updated.



**NOTE**

- If the query 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 query specifies a specific object version number, that version of the requirement will remain in the document regardless of changes to its status.

- 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.



- 8 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 query.

### 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 157](#).
- 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 from the master document.

- 4 Edit the title and description as desired. For information on formatting text, see ["HTML Text Formatting Toolbar" on page 34](#).
- 5 To populate the content of the chapter based on a specific query, select the **Based on Query** option. You can then select the query to use as the basis of the chapter's content. This may be a class report, relationship report, or traceability report.



**NOTE** If the query returns multiple versions or non-current versions of a requirement, they will be included in the document. Prior to RM 11.2.2, only the Current version would be included.

- 6 Optionally choose the **Update chapter when script is updated** checkbox to dynamically refresh the content in the chapter when the query is updated.



### NOTE

- If the query 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 query specifies a specific object version number, that version of the requirement will remain in the document regardless of changes to its status.

- 7 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 177](#) 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 157](#).
- 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 157](#).
- 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.

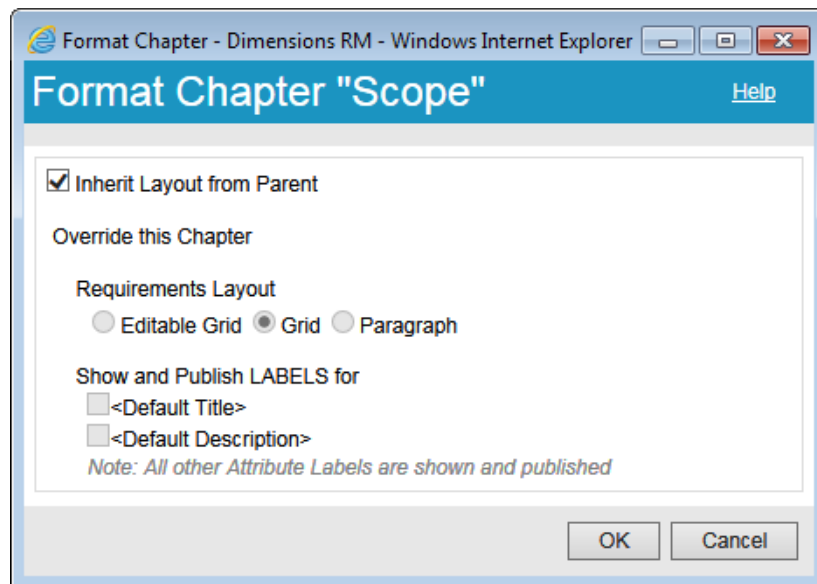
**NOTE**

- 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.

## Formatting Chapters

To specify the layout you want for a chapter:

- 1 Click the **Format chapter** () button. The **Format Chapter** dialog opens.



- 2 **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.
- 3 To change the **Requirement Layout**, select the **Grid** or **Paragraph** layout option.



**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.

- 4 To change which attribute labels are shown in the Detail pane and in the published document, select or deselect the check boxes for **<Default Title>** and **<Default Description>**.
- 5 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 157](#).
- 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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 7 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 48](#).
- 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 32](#).



### 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 184](#).

## 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 99](#).
- 7 Click **Close**.



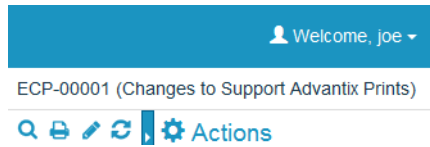
### NOTE

- 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.



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 166](#).

#### To assign an ECP:

- 1 Open the document to the Document work page, if it is not already open. See ["Opening Documents" on page 157](#).
- 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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 6 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 48](#).
- 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.

Links				
History				
<a href="#">Properties</a> <a href="#">Differences</a>				
	TIME MODIFIED	OBJECT ID	MODIFIED BY	CURRENT STATUS
	18-MAY-2006@09:17:06	33	EPHOTO	Replaced
	25-NOV-2014@08:23:23	51	EPHOTO	Current (Baselined)
Polls				

The version in use by the document will not have an Exchange (  ) icon (nor will rejected versions).

- 3 Click the Exchange (  ) icon of the version you want to use in the document. A dialog appears asking you to confirm this change.
- 4 Click **OK**.

## 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.

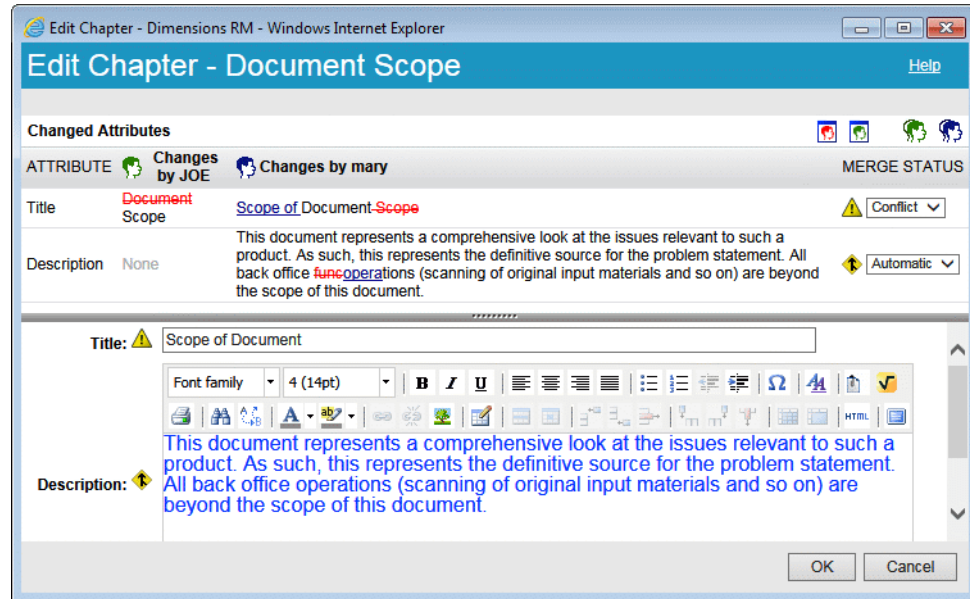
Change Type	Description
Automatic	When the change made by the first user is the same as the change made by the second user or when the change made by the first user is distinct from any change made by the second user, automatic merging can occur because a review of the change is not strictly necessary. 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"><li>■ Accept the change the second user made</li><li>■ Accept the change the first user made</li><li>■ Accept the original value</li><li>■ Combine the changes manually by editing the value directly in the main part of the dialog box.</li></ul>


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 187](#) and ["Merging the Changes" on page 187](#).

## 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.





Joe made the first change when he changed the *Title* attribute from "Document Scope" to "Scope." This change involves a conflict, because Mary changed the *Title* attribute from "Document 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. You can access them either through the **Comments** group of the **Actions** pane, or, for a requirement, through the **Comments** section in the Edit dialog for that requirement (see chapter ["Participating in Discussions" on page 146](#)).






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.

**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.


**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 Text

Comments can be added to any word in a chapter or Requirement. After the comment is added, that word 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**.

# 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 157](#).
- 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 **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.

- 8 Click the **OK** button in the **Create Snapshot** dialog.
- 9 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.
  - **Modify:** The Modify Snapshot dialog opens. Modify the **Name** and **Description** fields as needed, and click the **OK** button.
  - **Save As:** Copies the current document into a new document.
  - **Delete:** Click **OK** on the resulting confirmation dialog. The snapshot is deleted.



**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 191](#).

## Working with Snapshots of a Closed Document

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 170](#) 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 157](#).

- 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.
  - 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 192](#).

## 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 169](#).

- 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 193. 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 196](#).

#### 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 157](#).
- 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 170](#). 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 169](#).

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 157](#).
- 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 157](#).
- 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 170](#). 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 157](#).
- 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 (\*.xls)**.
- 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 169](#)) 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 157](#).
- 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 157](#).
- 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 157](#)).
- 2 Double-click the root chapter. This opens the **Document Settings** dialog.
- 3 Ensure that the **Edit Document** 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 199](#)).

**To execute a transition, do the following:**

- 1 Open the document (see chapter ["Opening Documents or Snapshots" on page 157](#)).
- 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 157](#)).
- 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 99](#) (start with point 2 of the list) and ["Workflows" on page 92](#).



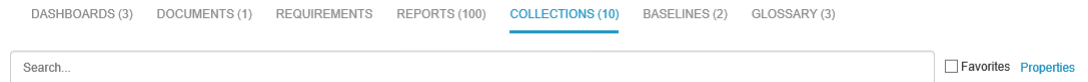
## Chapter 5

---

# Working with the Home View


About the Home View	202
Dashboard Tab	202
Documents Tab	209
Requirements Tab	210
Reports Tab	210
Collections Tab	212
Baselines Tab	212
Glossary Tab	213
Working with Products and Projects	215
Copying Category Content	215

## About the Home View



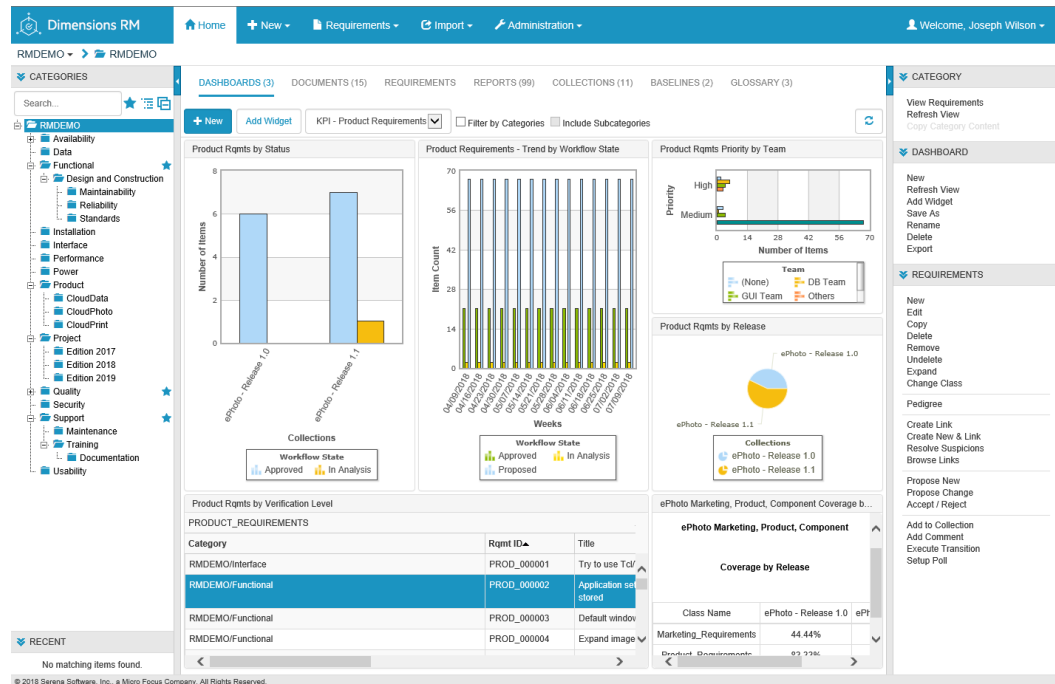
From the Home View users may run dashboards, or access documents, requirements, reports, collections, baselines or glossary entries. It includes the following elements:

- **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 dashboard reports use the requirements of the category selected in the Category 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 32](#).

### Limiting Report Data

- **Filter by Categories:** If selected, the dashboard only shows data matching the category in the **Categories** tree. If unselected, the dashboard shows all data.



**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 which match its category constraint.





- **Include Subcategories:** If selected, the dashboard shows data from the selected category and its subcategories.



**NOTE** You can select the **Include Subcategories** check box only, if **Filter by Categories** is selected.

## 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 206](#), ["Adding a Graphical Report to the Dashboard" on page 206](#), or ["Adding a Website to the Dashboard" on page 207](#).
-  **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 217](#).

### 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 204](#).
- 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 207](#).
- 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 229](#).

### 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 204](#).
- 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 207](#).
- 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 204](#).
- 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.

**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 (1)	REQUIREMENTS (71)	REPORTS (100)	COLLECTIONS (10)	BASELINES (2)	GLOSSARY (3)
Search...						
<input type="checkbox"/> Favorites <a href="#">Properties</a> <a href="#">Hide Snapshots</a> <a href="#">Show Dependent Documents</a>						
Name	Time Created	Time Modified	Modified By	Owner	State	
ePhoto Requirements	18-MAY-2006@00:00:00	10-JUL-2018@03:49:22	Ryan Forbes	Ryan Forbes	Draft	ePhoto Requirements 0.1 10-JUL-2018

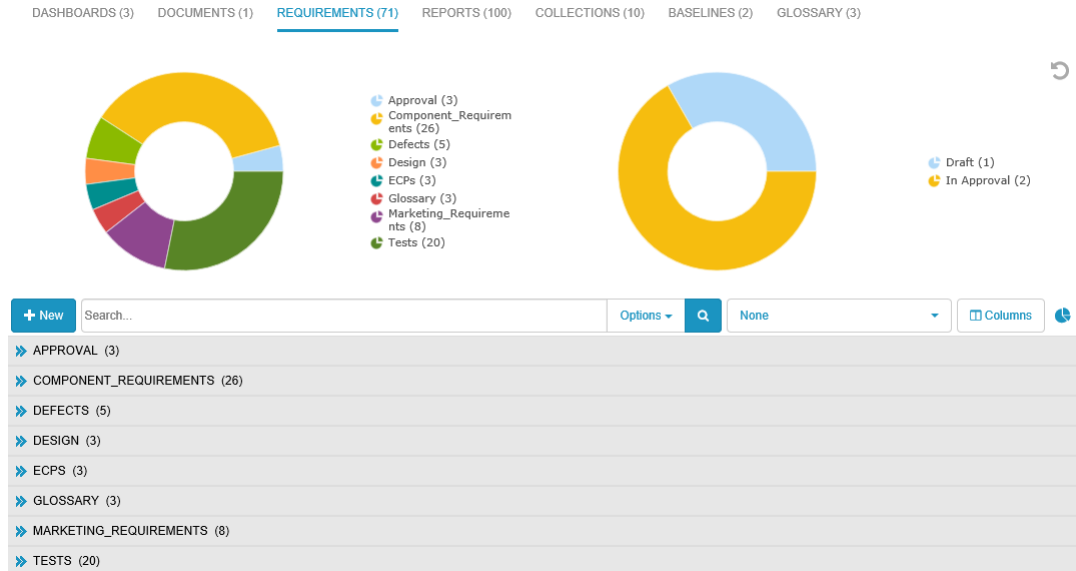
This is an alphabetical listing of the RM documents in the currently selected category or categories, as filtered by the **Search** field.

**Show Dependent Documents/Hide Dependent Documents:** This toggles the display of the child documents column, which displays any child documents of the currently selected master document. Showing dependent documents hides the snapshot display.

**Show Snapshots/Hide Snapshots:** This toggles the display of the snapshots column, which displays any snapshots of the currently selected document. Showing snapshots hides the dependent documents display.

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 149](#).

## 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 70.

If you want to search by specific attributes, use Quick Search (see chapter "[Finding Requirements with Quick Search](#)" on page 80).

## Reports Tab

DASHBOARDS (3) DOCUMENTS (1) REQUIREMENTS <b>REPORTS (100)</b> COLLECTIONS (10) BASELINES (2) GLOSSARY (3)			
Search...			<input type="checkbox"/> Favorites <input checked="" type="checkbox"/> Public Reports <input checked="" type="checkbox"/> My Reports
Class Reports		Relationship Reports	Traceability Reports
Name ▲	Class	Name ▲	Name ▲
Build 1 Marketing Rqmts	Marketing_Require...	All Current Component Requirements	Component Requirement Defects
Component Rqmts select by Category	Component_Require...	All Current Data Comp Requirements	Component Requirement Tests
Current Marketing Rqmts	Marketing_Require...	All Current Discussions	Component Requirements Design
		All Current Marketing Rqmts	ePhoto Component Requirement Defects
		All Current Product Rqmts	ePhoto Marketing Requirements Trace

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.

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 217](#).

## 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

DASHBOARDS (3)

DOCUMENTS (1)

REQUIREMENTS

REPORTS (100)

COLLECTIONS (10)

BASELINES (2)

GLOSSARY (3)

Search...

☐ Favorites [Properties](#)

Name ▲	Time Created	Time Modified	Modified By	Owner	State
Engineering Hot List	02-MAY-2003@00:15:47	19-FEB-2018@13:58:51	<a href="#">Carter Benton</a>	<a href="#">Carter Benton</a>	
ePhoto - Release 1.0	25-NOV-2014@08:11:32	19-FEB-2018@13:59:15	<a href="#">Ryan Forbes</a>	<a href="#">Ryan Forbes</a>	

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 32](#).

# Baselines Tab

DASHBOARDS (3)

DOCUMENTS (1)

REQUIREMENTS

REPORTS (100)

COLLECTIONS (10)

BASELINES (2)

GLOSSARY (3)

Search...

☐ Favorites

[Properties](#)

Name ▲	Time Created	Time Modified	Modified By	Owner	State
Baseline of Engineering Hot List	17-MAY-2006@00:00:00	17-MAY-2006@00:00:00	<a href="#">Ryan Forbes</a>	<a href="#">Ryan Forbes</a>	
Specification Baseline - Release 1.0	26-NOV-2014@04:53:03	26-NOV-2014@04:53:03	<a href="#">Ryan Forbes</a>	<a href="#">Ryan Forbes</a>	

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 32](#).

# Glossary Tab

The **Glossary** tab is only available if your administrator created the Glossary class as described in the *Administrator's Guide*.

DASHBOARDS (3) DOCUMENTS (1) REQUIREMENTS REPORTS (100) COLLECTIONS (10) BASELINES (2) GLOSSARY (3)

+ New
Filter...
ACT

A
Advantix

C
CD-ROM

T
Tcl/Tk

CD-ROM

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.

Synonyms
None

Delete
Edit

## 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 a Glossary Entry

If parts of a glossary entry are identical, you may choose to copy an entry and then edit it rather than manually copying parts over to the new entry.

**To copy a glossary entry, do the following:**

- 1 Select the glossary entry in the list.
- 2 Click **Copy** in the **Glossary** set of the **Actions** pane. This changes the detail section of the **Glossary** tab to the edit form.
- 3 In the **Term** box, specify the word or phrase for which you want to define the description in the glossary.
- 4 Make your desired changes to **Description** or **Synonym**.
- 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** in the **Glossary** set of the **Actions** pane.

## Deleting a Glossary Entry

**To delete a glossary entry, do the following:**

- 1 Select the glossary entry in the list.
- 2 Click **Delete** in the **Glossary** set of the **Actions** pane. This opens the **Delete Entry** dialog.
- 3 Click **OK** to delete the glossary entry.

## 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.

# 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

Running Reports	218
Editing a Report	219
Creating a Class Report	221
Creating a Relationship Report	222
Creating a Traceability Report	224
Creating a Graphical Report	229
Working in the Traceability Work Page	226
Moving and Copying Reports to a Different Category	232
Renaming Reports	233
Deleting Reports	233
Copying the URL of a Report to the Clipboard	233

# Running Reports

## To run a report:

- 1 Double-click the desired report in the Reports tab of the Home View.
- 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 32](#).

## 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.
- **Editable Grid:**    ["Editable Grid View" on page 29](#)
- **Grid:**    ["Grid View" on page 31](#)
- **Form:**    ["Form View" on page 31](#)
- **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 222](#).

- **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.

**You can delete the link between two requirements by executing the following steps:**

- a Run the report.
- b Click the square where both requirements intersect. This opens the **Delete Link** dialog.
- c Click **OK** to delete the link.

## 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"> <li>■ All matching requirements in the primary class that have links to matching requirements in the secondary class</li> <li>■ All matching requirements in the secondary class that have links to matching requirements in the primary class</li> </ul>
Non-Compliance only	The reports lists either: <ul style="list-style-type: none"> <li>■ All matching requirements in the primary class that have no links to matching requirements in the secondary class</li> <li>■ All matching requirements in the secondary class that have no links to matching requirements in the primary class</li> </ul>

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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 6 Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 48](#).

- 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.

## 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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 5 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 48](#).

- 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 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 42)
  - **Container - Source** and **Container - Target** (see "[Relationship Constraints Tab](#)" on page 45)
- 6 **Display Options**: As needed, specify how to display the results. See "[Display Options Tab](#)" on page 48.
- 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 42](#) and ["Relationship Constraints Tab" on page 45](#).

**7 Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 48](#).



**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:

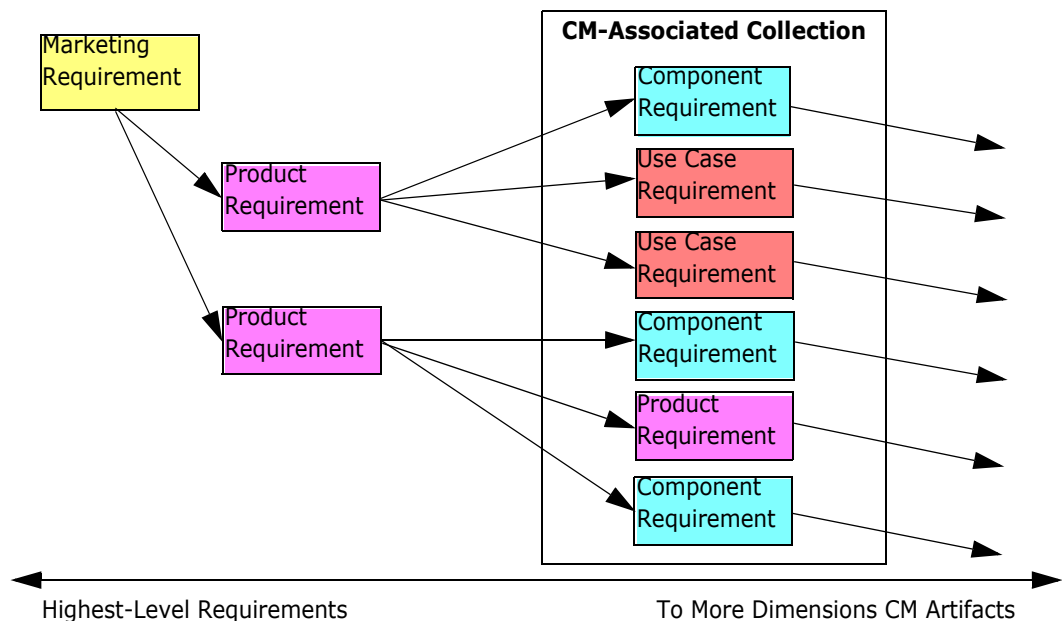
- **Public Report:** Select this box to make the report public, otherwise the report is private.
- **Visible for:** This option is only available if **Public Report** is selected.  
If selected, you can choose which groups can access the report.  
If unselected, only the user who created the report can 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 <a href="#">"Understanding the Traceability Tree" on page 227</a> .
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 228](#).
- 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 228](#).
- 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.



**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 33](#).
- 5 **Attributes to Display in the Tooltip:** To specify which attributes to show in the tooltip, see chapter ["Attributes to Display List" on page 33](#).
- 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 (:).

# 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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 7 **Display Options:** Select a style in the **Report Style** list and attributes in the **Row** and **Column** boxes in the *Chart Content* area. For Pie reports, only the **Row** box is available.



**NOTE** Note that the **Row** and **Column** boxes do not include these attributes:

- Multi Line attributes
- HTML enabled attributes
- Date attributes

- 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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 7 **Display Options:** Select a style in the **Report Style** list.

- 8 Select attributes in the **1st Field** and **2nd Field** boxes in the *Chart Content* area.



**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>)

- 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 89](#).




**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.


## 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.



# 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.

# 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 <b>&amp;hideTitleBar=true</b> to the URL.	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&amp;db=ORCL&amp;proj=RMDemo&amp;reportID=1141&amp;hideTitleBar=true</code>
Show Trace Report in Outline View	To view a trace report in Outline View, add <b>&amp;outlineView=1</b> to the URL.	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&amp;db=ORCL&amp;proj=RMDemo&amp;reportID=1141&amp;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 <b>&amp;&lt;Parameter Name&gt;=&lt;value&gt;</b> to the URL.  When providing run-time parameters, the value must be URL encoded (e.g. Café translates to Caf%C3%A9).	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&amp;db=ORCL&amp;proj=RMDemo&amp;reportID=3522&amp;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   symbol, e.g. <b>&amp;TRP__VERIFICATION_LEVEL_1=System Module</b> .	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=report&amp;db=ORCL&amp;proj=RMDemo&amp;reportID=3522&amp;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=RMDEM0&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

About Collections	238
Collection Basics	238
Baselining a Collection	241
Comparing Collections	243
Using Workflows with Collections	243
Moving Containers to a Different Category	244
Copying the URL of a Collection to the Clipboard	245

# 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.

## 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:
  - **Transfer to child:** 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 from parent:** When you edit the instance object and create a new child object, the links from the primary (parent) object are deleted.

- **Transfer to parent on deletion of child:** 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.
  - **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.



**TIP** 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.

- 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 201](#).
- 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 123](#).

**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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 6 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 48](#).
- 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 32](#).
- 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 68](#).

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 201](#).



- 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 rename 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 201](#).
- 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 238](#) for information on defining collection rules.

## Baselining a Collection

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 111.](#))
- 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.

#### To baseline a collection:

- 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.

## Comparing Collections

### To compare the contents of two collections:

- 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 201](#).
- 2 Select the **Collections** tab.
- 3 Select the desired collection.
- 4 Click **Compare** from the **Collections** set of the **Actions** pane. This opens the **Compare Containers** dialog.
- 5 **Select Container:** Click ... to select the container to compare.
- 6 **Description:** Select this checkbox 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

If configured by your administrator, you can use Workflows with collections and baselines.

### Assigning a Collection to a Workflow

#### To assign a collection to a workflow, do the following:

- 1 Open the collection (see chapter ["Opening a Collection to the Collection Work Page" on page 238](#)).

- 2 Click **Edit Properties** in the **Collections** 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 cannot be changed. Thus, verify that you selected the correct workflow.

- 4 Click **OK**.

## Executing a Transition on a Collection

In order to use a workflow with a collection, a Workflow must be assigned to that container (see chapter ["Assigning a Collection to a Workflow" on page 243](#)).

**To execute a transition, do the following:**

- 1 Open the collection (see chapter ["Opening a Collection to the Collection Work Page" on page 238](#)).
- 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

If a collection 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 238](#)).
- 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 99](#) (start with point 2 of the list) and ["Workflows" on page 92](#).

## Moving Containers to a Different Category

When you create a container, you can assign it to a category. The following procedure describes how to change the category assignment of an existing container.

## Moving Containers by Drag & Drop

- 1 Open the Home View by clicking .
- 2 Select the desired tab: **Documents**, **Collections**, or **Baselines**.
- 3 If you want to move a snapshot, click **Show Snapshots**.
- 4 Drag the object and drop it at the desired category in the **Categories** tree.

## Copying the URL of a Collection to the Clipboard

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

### Copying the URL of a Collection to the Clipboard

**To copy the URL of a collection:**

- 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 <b>&amp;editableGrid=true</b> to the URL.	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=collection&amp;db=ORCL&amp;proj=RMDEMO&amp;collectionId=5&amp;editableGrid=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 <b>&amp;hideTitleBar=true</b> to the URL.	<code>http://myserver:8080/rtmBrowser/cgi-bin/rtmBrowser.exe?goto=collection&amp;db=ORCL&amp;proj=RMDEMO&amp;collectionId=5&amp;hideTitleBar=true</code>

## Chapter 8

---

# Importing Requirements

Importing Requirements from Microsoft Word Documents	248
Importing a Roundtrip Document	253
Importing Requirements from an XML File	253
Importing Requirements from a CSV File	255
Importing Test Case and Test Run Requirements	260
Importing Requirements from IBM Rational DOORS	261
Importing Baselines from IBM Rational DOORS	264
Importing Previously Exported Requirements	265

# 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)

## 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:

<b>TITLE</b>	Runs on "standard" home PC		
<b>Priority</b>	<b>Paragraph Title</b>	<b>Document ID</b>	
1	Feature 3	Marketing Rqmts	
<b>Category</b>	RMDEMO/Power	<b>Delivery Phase</b>	Build1 TBD
<b>Text</b>	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:

<b>Class Name</b>	Marketing_Requirements		
<b>Rqmt ID</b>	<b>Title</b>	<b>Text</b>	
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:

<b>Class Name</b>	<b>Rqmt ID</b>	<b>Title</b>	<b>Text</b>
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.
Marketing_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 252](#)).
- 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 248](#)).

- 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

For clarity, the modes of import (**Table[s] only** and **Entire Document**) are described separately in the following sections. However, these modes begin the same way, that portion is described only once, below.

### To initiate the import of a Word document:

- In RM Browser, select **Word document** from the **Import** menu. The MS Word Import dialog opens.
- File Name:** Click the **Browse** button to navigate to and select the Word file, and then click the **Open** button.
- Choose whether to **Create**, **Update**, or **Replace** content from the Word document.
  - Create** will create new requirements in Dimensions RM.
  - Update** will update existing versions of requirements with new content from the Word document, *without* creating new versions. Only existing requirements that have new values in the Word document will be updated.
  - 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.
- Proceed to the relevant import mode section below:
  - ["Table\[s\] only Import Mode" on page 251](#)
  - ["Entire Document Import Mode" on page 252](#)

### Table[s] only Import Mode

Continued from ["Importing a Word File" on page 251](#).

- Select **Table[s] only** from the drop-down list.
- Class Identifier:** Specify the attribute name you used to identify the class. For example, Class Name.

- 3 Click the **Import** button. A second MS Word Import dialog opens. This one includes a information about the requirements that were created and a summary of the import results. Click the **Close** button to dismiss the results.
- 4 Click the **Close** button on the remaining MS Word Import dialog.
- 5 Click the **Close** button on the MS Word Import - Dimension RM dialog.

### ***Entire Document Import Mode***

Continued from ["Importing a Word File" on page 251](#).

- 1 Select **Entire Document** from the drop-down list.
- 2 **Class Identifier:** Specify the attribute name you used to identify the class. For example, Class Name.
- 3 **Document Name:** Specify a name for the RM document that is to be created or revised.
- 4 Click the **Import** button. A second MS Word Import dialog opens. This one includes a information about the requirements that were created and a summary of the import results. Click the **Close** button to dismiss the results.
- 5 Click the **Close** button on the remaining MS Word Import dialog.

### ***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 253](#).

## **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 196](#)), 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 **MS Word Import** dialog.
- 2 **File Name:** Click **Browse...** to navigate to and select the Roundtrip Word file, and then click the **Open**.
- 3 Choose whether to **Update**, or **Replace** content from the Word document.
  - **Update** will update existing versions of requirements with new content from the Word document, *without* creating new versions. Only existing requirements that have new values in the Word document will be updated.
  - **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.

- 4 From the Import mode box, select **Roundtrip**.
- 5 Click **Import**. This opens a second MS Word Import dialog, which includes information about the requirements that were created and a summary of the import results.
- 6 Click the **Close** button to dismiss the results.
- 7 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.

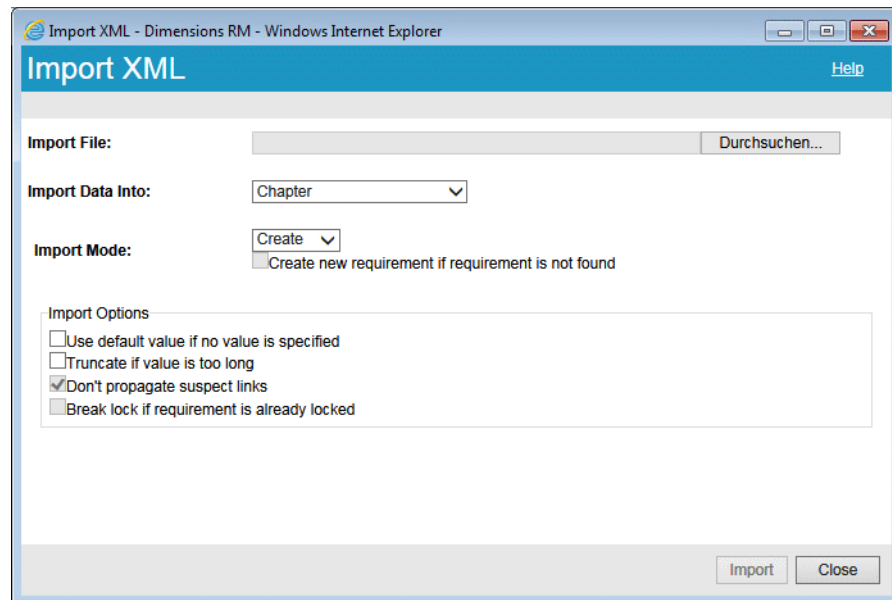
For example:

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.
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. <b>NOTE:</b> This option is not available for the <b>Create</b> 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. <b>NOTE 1:</b> This option does not remove CM locks. <b>NOTE 2:</b> This option is not available for the <b>Create</b> 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 267), 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 260.

- 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 **Field Separator** list choose **Comma** or **Semi-colon**, depending on what separator is used in the CSV file.
- 6 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.
- 7 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**.



- 8 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
<b>Create</b>	<ul style="list-style-type: none"> <li>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.</li> <li>First select the requirements class from the <b>RM Class</b> field. Then, select the column from the <b>CSV Column List</b> field and the corresponding attribute from the <b>RM Attribute</b> list. Click the right arrow button to add the mapped pair to the <b>Mapped List</b> field.</li> </ul>
<b>Update</b>	<ul style="list-style-type: none"> <li>You must first define criteria to locate the requirements to update, under <b>Mapping Should Be Used to Locate Objects</b>. 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 <b>RM Class</b> field. Then, choose the CSV column to match from the <b>CSV Column List</b> field and the corresponding attribute from the <b>RM Attribute</b> list. Click the right arrow button to add the matched pair to the <b>Mapped List</b> field.</li> <li>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 <b>CSV Column List</b> field and the corresponding attribute from the <b>RM Attribute List</b> field, then click the right arrow button to add the mapped pair to the <b>Mapped List</b> field.</li> <li>You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the <b>Ignore rows matching multiple objects</b> 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.</li> <li>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 <b>Mapping to Be Used to Populate Data</b>.</li> </ul>
<b>Replace</b>	See the above information on Update.

Import Mode	Mapping Guidelines
<b>Delete</b>	<ul style="list-style-type: none"> <li>■ 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 <b>RM Class</b> field. Then, select the CSV column from the <b>CSV Column List</b> field and the corresponding RM attribute from the <b>RM Attribute List</b> 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> <li>■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the <b>Ignore rows matching multiple objects</b> 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.</li> </ul>
<b>Undelete</b>	<ul style="list-style-type: none"> <li>■ 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 <b>RM Class</b> field. Then, select the CSV column from the <b>CSV Column List</b> field and the corresponding RM attribute from the <b>RM Attribute List</b> field. Click the right arrow to add the mapped pair to the <b>Mapped List</b> field. Any attributes with values that match the value of the corresponding CSV column will be undeleted.</li> <li>■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the <b>Ignore rows matching multiple objects</b> 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.</li> </ul>
<b>Remove</b>	<ul style="list-style-type: none"> <li>■ 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 <b>RM Class</b> field. Then, select the CSV column from the <b>CSV Column List</b> field and the corresponding RM attribute from the <b>RM Attribute List</b> 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> <li>■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the <b>Ignore rows matching multiple objects</b> 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.</li> </ul>

Import Mode	Mapping Guidelines
<b>Link</b>	<ul style="list-style-type: none"> <li>■ 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.</li> <li>■ First choose the type of relationship from the <b>RM Relation</b> field.</li> <li>■ To define the criteria for the first requirement, match columns from the <b>CSV Column List</b> field under <b>Primary Class</b> to attributes in the <b>RM Attribute List</b> field. Select the values and click the right arrow button to add the mapped pair to the <b>Mapped List</b> field.</li> <li>■ To define the criteria for the second requirement, match columns from the <b>CSV Column List</b> field under <b>Secondary Class</b> to attributes in the <b>RM Attribute List</b> field. Select the values and click the right arrow button to add the mapped pair to the <b>Mapped List</b> field.</li> <li>■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the <b>Ignore rows matching multiple objects</b> 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.</li> </ul>
<b>Unlink</b>	<ul style="list-style-type: none"> <li>■ 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.</li> <li>■ First choose the type of relationship from the <b>RM Relation</b> field.</li> <li>■ To define the criteria for the first requirement, match columns from the <b>CSV Column List</b> field under <b>Primary Class</b> to attributes in the <b>RM Attribute List</b> field. Select the values and click the right arrow button to add the mapped pair to the <b>Mapped List</b> field.</li> <li>■ To define the criteria for the second requirement, match columns from the <b>CSV Column List</b> field under <b>Secondary Class</b> to attributes in the <b>RM Attribute List</b> field. Select the values and click the right arrow button to add the mapped pair to the <b>Mapped List</b> field.</li> <li>■ You can optionally choose to only include rows from the CSV file that uniquely match one object in Dimensions RM. Select the <b>Ignore rows matching multiple objects</b> 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.</li> </ul>

- 9 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 267](#)) are imported through CSV import (see chapter ["Importing Requirements from a CSV File" on page 255](#)). 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 **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.
- 12** Click **Next**. This opens the *RM Attribute Mapping* page. Here, you can map ReqIF attributes to RM attributes.
- 13** **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*.


- 14** **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.

- 15 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 261](#).

### 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 262](#).



# 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 69](#).

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 248](#)
  - ["Importing Requirements from an XML File" on page 253](#)
  - ["Importing Requirements from a CSV File" on page 255](#)



## Chapter 9

---

# Test Case Management

Overview	268
Creating a Test Case	268
Creating a Test Run	268
Mass Creating Test Runs	269
Test Step Functions	269

## 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.




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 85](#).
- 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 97](#).



## 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 <b>New Test_Cases</b> window.
Cancel	Only available in expanded Test Steps mode. Cancels your changes and returns to the <b>New Test_Cases</b> window.

# Chapter 10

---

## Agile

Before you start	272
Agile Basics	272
Display Options	276
Showing Additional Story Attributes	276
Agile Tabs	277
Using Agile	282

## 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 69](#)).
- 3 Configure Agile (see chapter ["Configuring Agile" on page 306](#)).

## 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 69](#).

### Agile Features

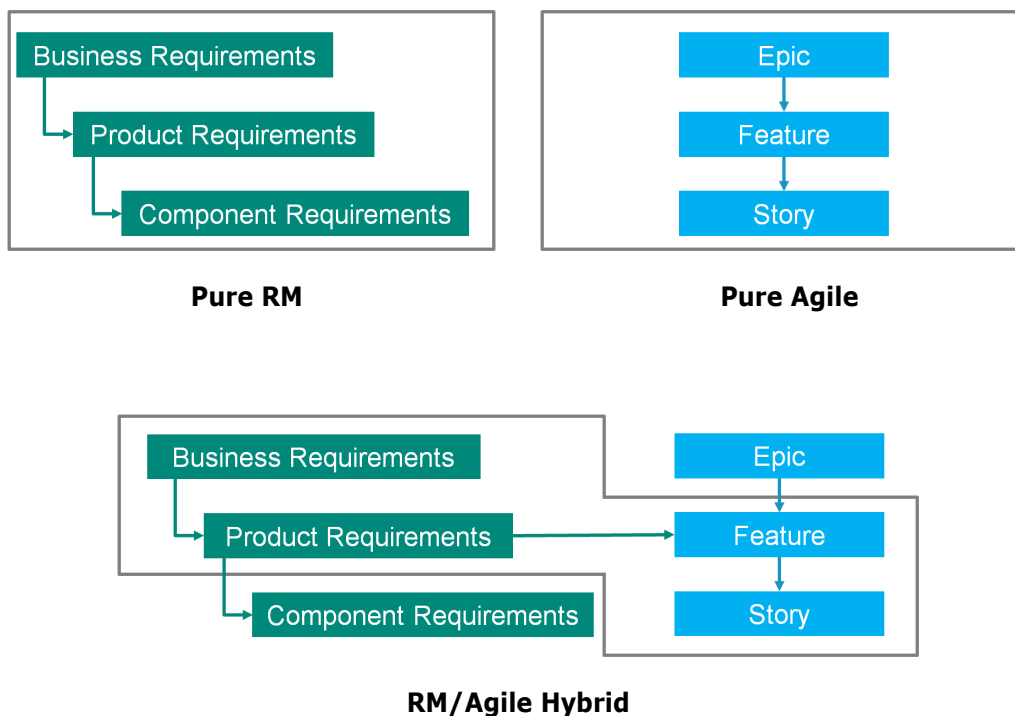
Agile in Dimensions RM allows:

- **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 282](#)). This opens the following tabs for the selected product:

- [Overview Tab](#)
- [Product Backlog Tab](#)
- [Product Storyboard Tab](#)
- [Sprint Planning Tab](#)
- [Sprint Storyboard 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 275](#). 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 275](#).



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 275](#). 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 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.


## 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
<b>Show my stories only</b>	Shows only the stories, which are assigned to the current user.
<b>Show full descriptions</b>	Shows the full description of all stories and features underneath the title.
<b>Hide "assigned to" badge</b>	Hides the badge of the user or group to which a story is assigned.
<b>Hide "effort" badge</b>	Hides the effort badge of a story.
<b>Hide "priority" badge</b>	Hides the priority badge of a story.
<b>Assigned features/stories</b>	<b>Gray:</b> Shows those features and stories which are assigned to a release, with a gray background. <b>Hide:</b> Hides those features and stories which are assigned to a release.
<b>Story progress</b>	<b>Show:</b> The progress is shown by changing the background of an item into a progress bar. <b>Hide:</b> No progress is shown.

## Showing Additional Story Attributes

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 276](#).

## 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 276](#)), 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**.

## **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:

**Product 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 275](#).



## Assigning Stories to Sprints


To assign a story to the selected sprint, drag it from the **Product 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 **Product 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**.

## Using Agile

### Using Products



#### *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 To specify the visible views, you can enable or disable and specify the tab headers on the following options:
  - **Overview**
  - **Product Backlog**
  - **Product Storyboard**
  - **Sprint Planning**
  - **Sprint Storyboard**By default, all above options are selected.
- 4 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 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 80](#)).
- 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 When using releases, tick the **Releases** box.
- 7 When using sprints, tick the **Sprints** box.
- 8 Assign **Epic**, **Feature** and **Story** classes. To assign a class, select it in the left list and click .
- 9 Select the tabs you want to display. To display a tab, tick the associated box. There are these tabs:
  - **Overview**
  - **Product Backlog**
  - **Product Storyboard**
  - **Sprint Planning**
  - **Sprint Storyboard**
- 10 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**.



# Chapter 11

---

## Administration

About Administration	290
Managing Users	290
Managing Groups	293
Managing Categories	294
Moving Requirements Between Categories	298
Managing Document Locks	299
Managing Requirement Locks	299
Managing List Attribute Values	299
Configuring Calculated Attributes	303
Configuring Instance Settings	306
Configuring Agile	306

## 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 **User Management** 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 **User Management** 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 **User Management** 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**.

## Assigning a User to one or several Groups

To assign a user to one or several groups:

- 1 Select **User Management** 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 **User Management** 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 **User Management** 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 **User Management** 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 296.

## Un-Assigning Users from a Group

### To un-assign users from a group:

- 1 Select **User Management** 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 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.

### 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 68.

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 User Dialog" on page 41](#)).
- 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 290](#).

#### **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 User Dialog" on page 41](#)).
- 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 User Dialog" on page 41](#)).
- 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 290](#).
- 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 42](#) and ["Relationship Constraints Tab" on page 45](#).
- 7 **Display Options:** As needed, specify how to display the results. See ["Display Options Tab" on page 48](#).
- 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 32](#).
- 11 **Category:** Select the category to which you want to move the selected requirements.
- 12 Click the **Move** button.

## Managing Document Locks

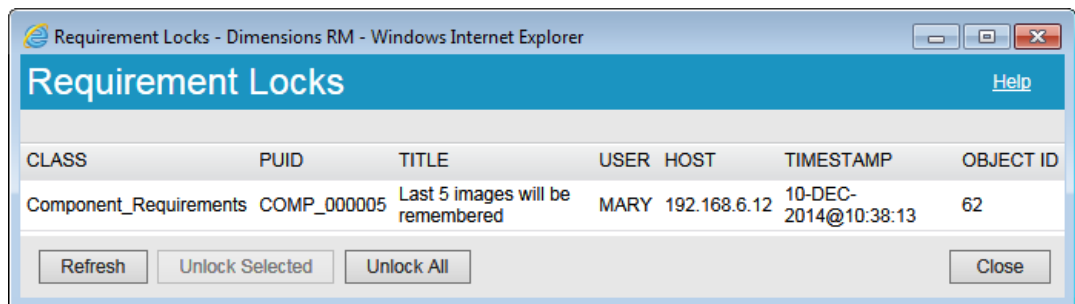
### To break locks on documents:

- 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.

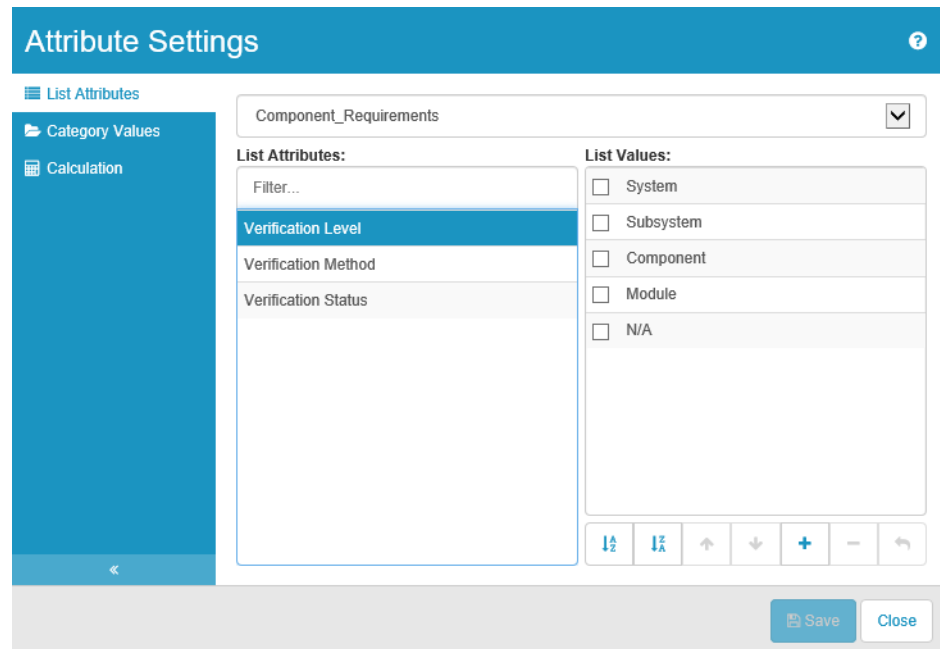


- 2 **Unlock All:** Click this button to unlock all locked requirements.
- 3 **Unlock Selected:** Click this button to unlock only the selected requirements. Ctrl-click to select multiple requirements.
- 4 **Refresh:** Click this button to update the display of locked requirements.

## 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 301](#).

- 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.

The screenshot shows the 'Attribute Settings' dialog box. On the left, there is a sidebar with 'List Attributes', 'Category Values', and 'Calculation'. The main area displays a tree view of categories under 'RMDemo'. The 'Availability' category is selected, showing a list of sub-categories: Cost, Scheduling, CloudPhoto, Data, Functional, Design and Construction, Maintainability, Reliability, Standards, Installation, Interface, Performance, Power, Product, CloudData, CloudPhoto, and CloudPrint. On the right, there is a search bar and a list of values. The 'Component\_Requirements' dropdown is set to 'Component\_Requirements'. The list of values includes 'VERIFICATION\_LEVEL' (checked), 'VERIFICATION\_METHOD' (checked), and 'VERIFICATION\_STATUS' (checked). Each value has a dropdown menu showing options like 'System', 'Subsystem', 'Component', 'Module', 'N/A', 'Test', 'Demo', 'Inspection', 'Analysis', 'N/A', 'Passed', 'Failed', and 'Incomplete'. At the bottom right, there are 'Save' and 'Close' buttons.

**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 Clear the box for the value you want the hide.
- 6 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**.

## Configuring Calculated Attributes

Calculated attributes can be used with numeric, alphanumeric, and text 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 304](#).
- 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 304](#).
- 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**.

## **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 66](#).

## **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 69](#).

### **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

---

Overview	312
SELECT Statement	312
CALCULATE Statement	324
XREF Statement	325
PLUS Statement	327
COMMENT Statement	327
Adding Rich Format Text to Query Prompts	329

# 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 <a href="#">"Comparing Text" on page 316</a> .
Date	INITIALIZED, NOT INITIALIZED, =, !=, <, >, <=, >=	For further information, see chapter <a href="#">"Comparing Dates" on page 318</a> .
File Attachment		Not supported
Group	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter <a href="#">"Comparing Text" on page 316</a> .
List	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter <a href="#">"Comparing Text" on page 316</a> .
Numeric	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter <a href="#">"Comparing Numbers" on page 316</a> .
Text	INITIALIZED, NOT INITIALIZED, IN, NOT IN, =, !=, <, >, <=, >=	For further information, see chapter <a href="#">"Comparing Text" on page 316</a> .

### Comparing Numbers

Operator	Description
INITIALIZED	The attribute contains a value. <b>Example:</b> TEST_ATTRIBUTE INITIALIZED
NOT INITIALIZED	The attribute contains no value. <b>Example:</b> TEST_ATTRIBUTE NOT INITIALIZED
=	The attribute value must be identical with the specified value. <b>Example:</b> TEST_ATTRIBUTE = 5
!=	The attribute value must <b>not</b> be identical with the specified value. <b>Example:</b> TEST_ATTRIBUTE != 5
<	The attribute value must be less than the specified value. <b>Example:</b> TEST_ATTRIBUTE < 5
>	The attribute value must be larger than the specified value. <b>Example:</b> TEST_ATTRIBUTE > 5
<=	The attribute value must be less or identical with the specified value. <b>Example:</b> TEST_ATTRIBUTE <= 5
>=	The attribute value must be larger or identical with the specified value. <b>Example:</b> TEST_ATTRIBUTE >= 5
IN	The attribute value must be identical to one of those provided <b>Example:</b> TEST_ATTRIBUTE IN (3, 4, 5)
NOT IN	The attribute value must <b>not</b> be identical to one of those provided <b>Example:</b> 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. <b>Example:</b> TEST_ATTRIBUTE INITIALIZED
NOT INITIALIZED	The attribute contains no value. <b>Example:</b> TEST_ATTRIBUTE NOT INITIALIZED
=	The attribute value must be identical with the specified value. <b>Example:</b> TEST_ATTRIBUTE = 'Test' The example returns REQ1.

Operator	Description
!=	The attribute value must <b>not</b> be identical with the specified value. <b>Example:</b> TEST_ATTRIBUTE != 'Test' The example returns REQ2.
<	The attribute value must be less than the specified value. <b>Example:</b> TEST_ATTRIBUTE < 'test' The example returns REQ1.
>	The attribute value must be larger than the specified value. <b>Example:</b> TEST_ATTRIBUTE > 'Test' The example returns REQ2.
<=	The attribute value must be less or identical with the specified value. <b>Example:</b> TEST_ATTRIBUTE <= 'test' The example returns REQ1 and REQ2.
>=	The attribute value must be larger or identical with the specified value. <b>Example:</b> TEST_ATTRIBUTE >= 'Test' The example returns REQ1 and REQ2.
IN	The attribute value must be identical to one of those provided <b>Example:</b> TEST_ATTRIBUTE IN ('Test', 'test') The example returns REQ1 and REQ2.
NOT IN	The attribute value must <b>not</b> be identical to one of those provided <b>Example:</b> 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><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE LIKE 'Business*'           <p>The value must start with the word "Business".</p> </li> <li>■ TEST_ATTRIBUTE LIKE '*business.'           <p>The value must end with "business.".</p> </li> <li>■ TEST_ATTRIBUTE LIKE ~'*business*'           <p>The value must contain the word "business".</p> </li> </ul> <p>* or %: A wildcard for any set of characters. _: A wildcard for a single character.</p>
NOT LIKE	<p>The attribute value must <b>not</b> match the specified search pattern. Note that the text casing is relevant.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE NOT LIKE 'Business*'           <p>The value must not start with the word "Business".</p> </li> <li>■ TEST_ATTRIBUTE NOT LIKE '* business.'           <p>The value must not end with "business.".</p> </li> <li>■ TEST_ATTRIBUTE NOT LIKE ~'*business*'           <p>The value must not contain the word "business".</p> </li> </ul> <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><b>Example:</b> TEST_ATTRIBUTE INITIALIZED</p>
NOT INITIALIZED	<p>The attribute contains no value.</p> <p><b>Example:</b> TEST_ATTRIBUTE NOT INITIALIZED</p>
=	<p>The attribute value must be identical with the specified value.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE = '01-SEP-2015'</li> <li>■ TEST_ATTRIBUTE = '01-SEP-2015@01:02:03'</li> </ul>

Operator	Description
!=	<p>The attribute value must <b>not</b> be identical with the specified value.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE != '01-SEP-2015' Any date which is not September 1<sup>st</sup>, 2015 matches this criterion, e.g. August 30<sup>th</sup>, 2015; December 31<sup>st</sup>, 2014 or September 2<sup>nd</sup>, 2015.</li> <li>■ TEST_ATTRIBUTE != '01-SEP-2015@01:02:03' Any which is not September 1<sup>st</sup>, 2015 at 01:02:03 matches this criterion, e.g. August 30<sup>th</sup>, 2015 at 12:05:45; September 1<sup>st</sup>, 2015 at 01:02:02 or September 2<sup>nd</sup>, 2015 at 02:03:04.</li> </ul>
<	<p>The attribute value must be less than the specified value.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE &lt; '01-SEP-2015' Any date before September 1<sup>st</sup>, 2015 matches this criterion, e.g. August 30<sup>th</sup>, 2015 or December 31<sup>st</sup>, 2014.</li> <li>■ TEST_ATTRIBUTE &lt; '01-SEP-2015@01:02:03' Any date before September 1<sup>st</sup>, 2015 at 01:02:03 matches this criterion, e.g. August 30<sup>th</sup>, 2015 at 12:05:45 or September 1<sup>st</sup>, 2015 at 01:02:02.</li> </ul>
>	<p>The attribute value must be larger than the specified value.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE &gt; '01-SEP-2015' Any date after September 1<sup>st</sup>, 2015 matches this criterion, e.g. September 2<sup>nd</sup>, 2015 or January 1<sup>st</sup>, 2016.</li> <li>■ TEST_ATTRIBUTE &gt; '01-SEP-2015@01:02:03' Any date after September 1<sup>st</sup>, 2015 at 01:02:03 matches this criterion, e.g. September 2<sup>nd</sup>, 2015 at 12:05:45 or September 1<sup>st</sup>, 2015 at 01:02:04.</li> </ul>
<=	<p>The attribute value must be less or identical with the specified value.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE &lt;= '01-SEP-2015' The date must be September 1<sup>st</sup>, 2015 or before to match this criterion, e.g. August 30<sup>th</sup>, 2015 or December 31<sup>st</sup>, 2014.</li> <li>■ TEST_ATTRIBUTE &lt;= '01-SEP-2015@01:02:03' The date must be September 1<sup>st</sup>, 2015 at 01:02:03 or before to match this criterion, e.g. August 30<sup>th</sup>, 2015 at 12:05:45 or September 1<sup>st</sup>, 2015 at 01:02:02.</li> </ul>

Operator	Description
>=	<p>The attribute value must be larger or identical with the specified value.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE &gt; '01-SEP-2015' The date must be September 1<sup>st</sup>, 2015 or after to match this criterion, e.g. September 2<sup>nd</sup>, 2015 or January 1<sup>st</sup>, 2016.</li> <li>■ TEST_ATTRIBUTE &gt; '01-SEP-2015@01:02:03' The date must be September 1<sup>st</sup>, 2015 at 01:02:03 or after to match this criterion, e.g. September 2<sup>nd</sup>, 2015 at 12:05:45 or September 1<sup>st</sup>, 2015 at 01:02:04.</li> </ul>
LIKE	<p>The attribute value must match the specified search pattern.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE LIKE ~'17-*'-2015' The date must be 17th of any month in 2015.</li> <li>■ TEST_ATTRIBUTE LIKE ~'*-SEP-2015' The date must be any day in September 2015.</li> <li>■ TEST_ATTRIBUTE LIKE ~'*-SEP-%' The date must be any day in September of any year.</li> <li>■ TEST_ATTRIBUTE LIKE '01-SEP-2015@*' The date must be September 1<sup>st</sup>, 2015; the time is irrelevant.</li> </ul> <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 <b>not</b> match the specified search pattern.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>■ TEST_ATTRIBUTE NOT LIKE ~'17-*'-2015' The date must not be 17th of any month in 2015.</li> <li>■ TEST_ATTRIBUTE NOT LIKE ~'*-SEP-2015' The date must not be any day in September 2015.</li> <li>■ TEST_ATTRIBUTE NOT LIKE ~'*-SEP-*' The date must not be any day in September of any year.</li> <li>■ TEST_ATTRIBUTE NOT LIKE '01-SEP-2015@%' The date must not be September 1<sup>st</sup>, 2015.</li> </ul> <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 322](#)).

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 into 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:

This is the layout we want to achieve:

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>PUIID <Title>TITLE from Marketing_Requirements where PUIID LIKE ~'<#
<p style="PADDING-LEFT: 30px"><span style="color: #006600; font-weight:
bold;">Please Enter the Requirement IDs in the field/box to the right</span></p>
<p style="PADDING-LEFT: 30px"><span style="color: #006600; font-weight:
bold;"></span>&nbsp;</p>
<ol style="PADDING-LEFT: 30px">
<li style="COLOR: "><span style="color: #0000ff;">Each requirement ID must be
enclosed in single quotes</span></li>
<li style="COLOR: "><span style="color: #0000ff;">If multiple IDs are requested,
separate them with commas</span></li>
<li style="COLOR: "><span style="color: #0000ff;">Please note values are CASE
```

- 16** Click on **Save and Run**.



# Glossary

---

<b>Accept</b>	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."
<b>accepted</b>	Current Status of a change request that was accepted.
<b>access rights</b>	The set of tasks that can be performed on a resource by a user.
<b>alias</b>	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.
<b>alphanumeric attribute</b>	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.
<b>alphabetic sort</b>	A simple alphabetical sort. Contrast with <i>numeric sort</i> .
<b>attribute</b>	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> .
<b>attribute constraint</b>	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> .
<b>attribute type</b>	The nature or data type of an attribute: e.g. alphanumeric string, free text field, or date.
<b>audit trail</b>	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.
<b>auto link</b>	A utility that lets you create or break links between objects of the primary and secondary class in the selected relationship.
<b>baseline</b>	A stable, unchangeable group of requirements. Baselining a collection ensures that the collection will never change.
<b>baseline lock</b>	A lock on a specific version of an item that indicates that the version is part of a baseline and thus cannot be modified.
<b>batch update</b>	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.
<b>category</b>	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.

<b>cardinality rule</b>	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.
<b>change request</b>	A proposal to change one or more requirement attributes.
<b>child collection</b>	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.
<b>child object</b>	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.
<b>class</b>	A container for related types of information. After classes are defined, requirements are entered into the class.
<b>class attribute</b>	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.
<b>class definition</b>	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.
<b>class definition diagram</b>	A graphical representation of the information classes that exist in an instance, along with the relationships between the classes.
<b>Class Definition</b>	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 <a href="#">class definition diagram</a> .
<b>CM Lock</b>	Configuration Management Lock. A security feature that makes objects read-only and stops them from being updated. You can lock requirements, collections, and documents.
<b>collection</b>	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 <a href="#">baseline</a> .

<b>collection linkability</b>	An occurrence of the association defined by a relationship. It connects two objects.
<b>command line tools</b>	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.
<b>compliance check</b>	A process in which Dimensions RM searches the database and produces a report specifying which objects do not contain links across a defined relationship.
<b>compliance report</b>	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.
<b>CSV import</b>	A utility that lets you import data from a comma separated value file into the Dimensions RM instance database.
<b>current</b>	Current Status of a requirement that is the most recent or current version.
<b>Current Status</b>	A special implicit attribute that identifies the state of a requirement.
<b>cyclic relationship</b>	Relationship in which the relationship points from one class back to the same class.
<b>database</b>	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).
<b>date attribute</b>	A user-defined attribute type that stores values that are based on user-defined date formats.
<b>Delete</b>	A command that changes the Current Status of a requirement to "deleted," but leaves the requirement in the instance.
<b>deleted</b>	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."
<b>derivation</b>	The analysis process in which an object is changed or translated into a form suitable for lower-level analysis and design.
<b>derived object</b>	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.
<b>Dimensions RM</b>	A suite of multi-user, configurable tools that support the capture, management, traceability and documentation of systems engineering information.

<b>Dimensions RM instance administrator</b>	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.
<b>Dimensions RM third-party integrator</b>	Person responsible for using the API functions to integrate third-party tools with Dimensions RM.
<b>doc_out</b>	A command line tool that lets you run a reporting script and generate the output to a variety of formats.
<b>Doctool</b>	A Dimensions RM tool that interprets a documentation script and generates an on-screen report.
<b>document</b>	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.
<b>Documents View</b>	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 <a href="#">Requirements View</a> , <a href="#">My Work View</a> , <a href="#">Traceability View</a> .
<b>ECP</b>	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.
<b>e-mail notification</b>	A feature that lets you register interest in certain types of changes within the instance data and to receive electronic notices of those changes.
<b>evaluated attribute</b>	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.
<b>expanding</b>	A process in which a single parent object is edited to produce one or more child objects.
<b>export utility</b>	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.
<b>file attachment attribute</b>	A user-defined attribute type that holds a single file that can be accessed through RM Browser



<b>filter</b>	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 <a href="#">script</a> .
<b>flowdown</b>	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.
<b>focusing</b>	A process in which two or more parent objects are edited to produce a single child object.
<b>form</b>	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.
<b>form view</b>	A view that displays requirements one at a time. From the form view you can edit requirement attributes.
<b>genealogical links</b>	Links between parent objects and child objects, or between parent collections and child collections.
<b>generic links</b>	Links that must span a relationship.
<b>grid view</b>	A view that lets you view multiple requirements in a table-like list. The column headings represent attributes of the requirements.
<b>group</b>	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.
<b>group attribute</b>	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.
<b>My Work View</b>	An RM Browser view that you can customize to include up to seven expandable sections. Each section contains the results of a query. RM My Work allows you to quickly view and modify requirements that you refer to on a regular basis. See also <a href="#">Documents View</a> , <a href="#">Requirements View</a> , <a href="#">Traceability View</a> .
<b>immediate child</b>	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.
<b>immediate parent</b>	The object that was used to create the currently selected object. Parent objects never have a status of "current."
<b>immediate relationship</b>	A relationship that refers to the immediate predecessor or successor of an object. Contrast with <a href="#">source relationship</a> .

<b>implicit attribute</b>	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> .
<b>import utility</b>	A utility that can be used to restore an instance or database from backup.
<b>instance</b>	A Dimensions RM work area where information is created and maintained.
<b>lifecycle</b>	The phases of an instance from its initial requirements specification through its implementation.
<b>link</b>	An instance of a relationship. You can link two requirements together if a relationship between their corresponding classes is defined.
<b>list attribute</b>	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 <i>group attribute</i> , which functions like an interdependent group of list attributes.
<b>lock manager</b>	A Dimensions RM tool used to lock and unlock Dimensions RM database elements such as source documents, tools, objects, and collections.
<b>lowest level child</b>	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.
<b>mandatory attribute</b>	An attribute for which users must specify values. Contrast with <i>optional attribute</i> .
<b>NOT_PRIMARY_IN</b>	A relationship operator that is used to identify requirements that can be at the origin of a link, but do not.
<b>NOT_SECONDARY_IN</b>	A relationship operator that is used to identify requirements that can be at the termination of a link, but do not.
<b>numeric attribute</b>	A user-defined attribute type that holds numeric values, such as reference numbers. The numbers can include decimal points.
<b>numeric sort</b>	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 <i>alphabetic sort</i> .
<b>object</b>	Synonymous with <i>requirement</i> .
<b>Object Editor</b>	A Dimensions RM dialog used to modify attributes and edit, focus, and expand class information.
<b>OLE</b>	Object Linking and Embedding. A technology for transferring and sharing information among applications.
<b>optional attribute</b>	An attribute for which you can use the default values or leave blank. Contrast with <i>mandatory attribute</i> .

<b>ORACLE_HOME</b>	The logical pathname of the file system or network location of your Oracle installation.
<b>parent collection</b>	A collection that links child collections. Parent collections cannot be linked directly to an object.
<b>parent object</b>	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.
<b>pending change request</b>	A change request that has not yet been accepted or rejected. A pending change request has a Current Status of "proposed."
<b>polling</b>	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.
<b>primary class</b>	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 <a href="#">secondary class</a> .
<b>PRIMARY_IN</b>	A relationship operator that is used to identify requirements that are at the origin of a link.
<b>primary object</b>	An instance of a primary class to which objects are linked.
<b>project</b>	See <a href="#">"instance"</a> on page 338.
<b>proposed</b>	Current Status of a requirement for which a change request has been made to either change the current requirement or create a new requirement.
<b>pseudonym</b>	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 <a href="#">alias</a> .
<b>PUID</b>	Persistent Unique Identifier. An intrinsic attribute.
<b>query</b>	A filter or script, expressed in terms of the instance schema, that you use to retrieve selected requirements.
<b>Quick Search</b>	A feature of the Requirements View in RM Browser that lets you quickly create a query to see the content of any category.
<b>Reject</b>	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."

<b>rejected</b>	Current Status of a change request that has been rejected.
<b>relationship</b>	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 <a href="#">link</a> .
<b>relationship attribute</b>	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 <a href="#">cardinality rule</a> .
<b>relationship rule</b>	Circumstances under which links between objects will be permitted. See also <a href="#">cardinality rule</a> .
<b>Remove</b>	A command that physically removes a requirement from an instance. Only requirements with a status of "current" can be removed.
<b>Replace</b>	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.
<b>replaced</b>	Current Status of a requirement that has been replaced by a newer version.
<b>resource category</b>	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.
<b>requirement</b>	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.
<b>Requirements View</b>	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 <a href="#">Documents View</a> , <a href="#">My Work View</a> , <a href="#">Traceability View</a> .
<b>RM Browser</b>	A Dimensions RM tool that provides Web access to a core set of Dimensions RM functions.
<b>RM Import</b>	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.
<b>RM Import Designer</b>	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.

<b>RM Manage</b>	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.
<b>RTM_HOME</b>	A logical name for the file system location of Dimensions RM programs and data.
<b>schema diagram</b>	See <a href="#">class definition diagram</a> .
<b>script</b>	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 <a href="#">filter</a> .
<b>script generator wizard</b>	A Dimensions RM wizard that provides a graphical interface allowing the user to specify the contents of a given report.
<b>secondary class</b>	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 <a href="#">primary class</a> .
<b>SECONDARY_IN</b>	A relationship operator that is used to identify requirements that are at the termination of a link.
<b>snapshot</b>	In the Document View of RM Browser, a read-only baseline of a document.
<b>source document</b>	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.
<b>source relationship</b>	A relationship that refers to the original object in a chain of versions. Contrast with <a href="#">immediate relationship</a> .
<b>suspect link</b>	A link that becomes questionable after one of the requirements in the link changes. The change could render other requirements questionable, or "suspect."
<b>tablespace</b>	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.
<b>template</b>	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.
<b>text attribute</b>	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.
<b>transactions</b>	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.
<b>traceability</b>	The process of making explicit links between requirements and other entities. Traceability lets you trace the evolution of an instance.

<b>Traceability View</b>	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 <a href="#">Documents View</a> , <a href="#">My Work View</a> , <a href="#">Requirements View</a>
<b>type</b>	A definition of the basic properties of a set of instances of a class, relationship, or attribute.
<b>Undelete</b>	A command that changes a the Current Status of a requirement from "deleted" to "current."
<b>Update</b>	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.
<b>user</b>	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.
<b>user attribute</b>	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.
<b>user-defined attribute</b>	An attribute that you can create for use in a specific class. See also <a href="#">alphanumeric attribute</a> , <a href="#">date attribute</a> , <a href="#">file attachment attribute</a> , <a href="#">group attribute</a> , <a href="#">list attribute</a> , <a href="#">numeric attribute</a> , <a href="#">text attribute</a> , <a href="#">user attribute</a> . Contrast with <a href="#">implicit attribute</a> .

# Index

---

## A

- Actions pane 26
- Agile 271
  - display options 276
  - features
    - add 285
    - delete 286
    - edit 285
  - Overview tab 277
  - Product Backlog tab 278
  - Product Storyboard tab 279
  - products
    - add 282
    - delete 282
    - edit 282
    - manual assignment 283
  - releases
    - add 283
    - delete 284
    - edit 284
  - Sprint Planning tab 280
  - Sprint Storyboard tab 281
  - sprints
    - add 287
    - delete 288
    - edit 287
  - stories
    - add 286
    - delete 287
    - edit 286
- alphabetic sort 34
- assigning a user to groups 292
- assigning users to groups 293
- attachments 194
- attributes
  - copying 97, 137, 138
  - group 82
- attributes, formatting text with HTML 34
- attributes, group 125
- auditability 89
- Auto load document check box 72
- autoloading documents, setting 72

## B

- Baseline Lock 333
- Baseline Locked 242

- baselines
  - importing from DOORS 264
- baselining 241
- Branch View settings 76
- branching 135, 139, 140
- bread crumb 22
- browse links 117

## C

- categories
  - access rights 296
  - adding 294
  - deleting 294
  - managing 294
  - maximum name length 294
  - moving 295
  - renaming 295
- categories in RM Browser 42
- Categories pane 24
- categories, moving requirements between 298
- change requests
  - proposing a new requirement 98
  - requesting a new requirement 98
  - reviewing 105
  - submitting 98, 104
- Chapter Layout
  - Editable Grid 154
  - Grid 154
  - Paragraph 153
- chapters
  - creating 175
  - deleting 178
  - editing 177
  - formatting 179
  - moving 181
- class report, create 221
- collection 121
- collection URL, copying to clipboard 245
- collections
  - baselining 241
  - creating 238
  - deleting 239
- comments
  - adding 146
  - replying to 147
  - reviewing 147
- comparing a document and its snapshot 191

- concurrent editing mode 66
- contacting technical support 13
- container 121, 122
  - inherited 122
  - workflow 243
- container properties 123
- copying collection URL to clipboard 245
- copying document URL to clipboard 160
- copying report URL to clipboard 233
- copying requirement URL to clipboard 94
- copying requirements 97, 101, 137, 138
- copying URL
  - of collection 245
  - of document 160
  - of report 233
  - of requirement 94
- copying users 291
- creating a new document 162
- creating users 290

## D

- dashboard
  - add graphical report 206
  - add standard report 206
  - add website 207
  - copy 208
  - create 204
  - delete 208
  - rename 208
  - runtime parameter 207
  - using reports 204
- default document view mode 73
- default requirement layout 73
- deleting requirements 89, 102
- deleting users 293
- dependent attributes 125
- discussions 146
- distribution report, create 229
- document settings 71
- document URL, copying to clipboard 160
- Documents
  - Create snapshot 190
- documents
  - adding a requirement 180
  - comparing 191
  - creating 162
  - creating a chapter 175
  - creating Excel 197
  - creating PDF 197
  - creating ReqIF 198
  - creating Word 193
  - default requirement layout 73
  - default view mode 73
  - deleting 164

- deleting a chapter 178
- deleting a requirement 181
- document differences report 193
- document properties 169
- editing 166
- editing a chapter 177
- editing a document 166
- finding and replacing character strings 158
- limited permissions 158
- moving chapters 181
- moving requirements 181
- opening 157
- preventing title numbers from being published 71
- printing 157
- publishing Adobe PDF documents 197
- publishing Excel spreadsheet 197
- publishing Microsoft Word documents 193
- publishing ReqIF documents 198
- requirement difference summary 192
- requirement versions 130
- restricting requirement classes 170
- setting autoloading of 72
- viewing attachments 194
- workflow 199

- documents, formatting 167
- DOORS 261, 264

## E

- Editable Grid view 28
- editing mode 66
- editing users 291
- export
  - CSV 85
    - Test Case 86
    - Test Run 86
  - Excel 85
  - HTML 85
  - PDF 85
  - Test Case 86
  - Test Run 86
  - Text 85
  - Word 85
  - XML 85

## F

- find and replace, Document work page 158
- finding requirements 80
- Form view 28
- formatting chapters 179
- formatting documents 167
- formatting text attributes with HTML 34



## G

- general settings 66
- graphical report, create 229
- Grid view 28, 31
- group assignment 292, 293
- group attributes 43, 82, 125

## H

- Help 55
- history, requirement 127
- HTML formatting toolbar 34

## I

- Import 247
  - CSV 255
    - Test Case 256, 260
    - Test Run 256, 260
  - DOORS 261, 264
  - previously exported requirements 265
  - ReqIF 261
  - Round Trip 265
  - Test Case 256, 260
  - Test Run 256, 260
  - Word 248, 251
  - XML 253
- inherited containers 122
- inherited links 116
- instance bread crumb 22
- instance settings 66

## L

- Link Browser 117
- Link Browser settings 74
- links
  - inherited 116
  - suspect 113
- list values, sorting 301
- lock, baseline 333

## M

- menu bar 22
- merging 135, 141, 142
- merging requirement changes 133
- moving requirements between categories 298
- My Work page
  - customizing 76
  - using 76

## N

- navigation 21
- numbering, preventing from being published 71
- numeric sort 34

## O

- operators in RM Browser 44

## P

- padlock icon 242
- passwords, changing 54
- passwords, sample databases 59
- Pedigree View 131
- polls
  - built-in queries 146
  - closing 145
  - creating 143
  - modifying 144
  - overview 142
  - viewing results 145
  - voting 145
- printing 103, 157
- proposed requirements
  - reviewing 105
- Publish
  - As Excel spreadsheet 197
  - As PDF document 197
  - As ReqIF document 198
  - As Word document 193

## Q

- QLARIUS\_RM sample database 59
- Quick Search 80
- Quick Search settings 70

## R

- refreshing
  - data 85
- Relationship Constraints tab 45
- relationship report, create 222
- removing requirements 89, 103
- replacing requirements 89
- report
  - create class report 221
  - create distribution report 229
  - create graphical report 229
  - create relationship report 222

- create traceability report 224
- create trend report 230
- edit 219
- run 218
- report settings 74
- report URL, copying to clipboard 233
- ReqIF 261
- requirement URL, copying to clipboard 94
- requirements
  - add to container 121
  - branching 135, 139, 140
  - collection 121
  - container 121
  - copying 97, 101, 137, 138
  - creating 98
  - deleting 89, 102, 181
  - editing 99
  - exporting Quick Search results 85
  - finding 80
  - history 127, 130
  - history, Pedigree View 131
  - importing from DOORS 261
  - importing from ReqIF files 261
  - importing from XML files 253
  - inherited containers 122
  - inherited links 116
  - merging after branching 135, 141, 142
  - merging changes 133
  - moving between categories 298
  - moving in documents 181
  - multiple selection 32
  - open container 122
  - printing 103
  - Quick Search 80
  - remove from container 122
  - removing 89, 103
  - replacing 89
  - restricting classes in documents 170
  - selecting multiple 32
  - undeleting 89, 102
  - updating 89
  - versions 91, 130
  - workflow elements 92
- restricting requirement classes in documents 170
- RM Browser 45
  - Attribute Constraints tab 42
  - basics 20
  - categories used in queries 42
  - changing your password 54
  - creating a new object 95
  - deleting requirements 102
  - editing requirements 99
  - getting Help 55
  - logging in 52
  - logging out 53
  - My Work page 76

- operators used in queries 44
- organizing collections 238
- overview 16
- participating in discussions 146
- polling 142
- refreshing data 85
- removing requirements 103
- reviewing change requests 105
- submitting change requests 104
- Traceability View 226
- undeleting requirements 102
- viewing contact information 58
- viewing system information 58
- viewing version information 58
- RM Browser interface 20
- RM Browser, navigating 21
- RMDEMO sample database 59

## S

- sample databases 59
- selection
  - multiple requirements 32
- settings
  - Branch View 76
  - document 71
  - general 66
  - instance settings 66
  - Link Browser 74
  - Quick Search 70
  - report 74
  - Split View 75
  - Sync View 76
  - user attribute 69
  - user settings 66
- Snapshot
  - Create from document 190
  - Delete 191
  - Modify 191
  - Save as new document 191
  - View 191
- sorting list values 301
- spell check
  - Chrome 63
  - Edge 61
  - Firefox 62
  - Internet Explorer 60
- Split View settings 75
- SQL 312
- suspect links 113
- Sync View settings 76

---

**T**

- technical support
  - contacting 13
- Test Case
  - CSV export 86
  - CSV import 256, 260
- Test Case Management
  - test case 268
  - test run 268
  - test steps 269
- Test Run
  - CSV export 86
  - CSV import 256, 260
- text attributes, formatting 34
- Traceability
  - customizing the tree 228
  - overview 226
  - understanding the traceability tree 227
- traceability report, create 224
- trend report 89
- trend report, create 230

**U**

- un-assigning a user from groups 292
- un-assigning users from groups 293
- undeleting requirements 89, 102
- updating requirements 89
- URL
  - collection, copying to clipboard 245
  - document, copying to clipboard 160
  - report, copying to clipboard 233
  - requirement, copying to clipboard 94
- user management 290
  - copying users 291
  - creating users 290
  - deleting users 293
  - editing users 291
  - group assignment 292, 293
- user settings 66

**V**

- views
  - Editable Grid 28
  - Form 28
  - Grid 28
- voting in a poll 145

**W**

- Welcome menu 21

- workflow
  - container 243
  - document 199
  - elements 92

**X**

- XML files, importing 253

