



The RMTrak Tag Filter

Placing Tags Intended for Separate Projects Into the Same Requirements Management Documents Without Confusion

Overview: RMTrak, by default, imports all of the requirements tagged in a document. If you use documents for more than one project, this could confuse your views and reports with information intended for two separate projects. By adding tags to the tag filter, you can specify which tags were specifically intended for a project so RMTrak knows to ignore all others.

RMTrak is RBC Product Development's exciting new requirements management tool for tagging, tracing, allocating, and verifying product requirements. RMTrak is a simple, non-intrusive program that captures, tracks, and manages the project requirements information in your requirements management documents from outside of the document creation process. This lets you use the tools you are already familiar with to format your documents, including Microsoft® Word with its powerful word processing features.

Unlike many other requirement management tools, RMTrak features a unique way to let you use requirements management documents in multiple projects. Thanks to RMTrak's tag filter, it's easy to list requirements of different projects within the same document, and yet not have them be confused in reports and views. RMTrak's tag filter allows each project to only recognize document tags that were intended for it, ignoring any tags intended for another project. This lets you use a requirements management document for more than one project without hassle or confusion.

Understanding Tags

To tag requirements in tables, you first need to understand basic tagging.

When you write requirements for RMTrak in Microsoft® Word, you'll need to put tags around each requirement. This can be done simply using the macros that RMTrak installs into a Tag menu in Microsoft® Word.

When you import documents into RMTrak, RMTrak recognizes the documents' requirements by their tags and formatting. For example, RMTrak will recognize tags if they are formatted to be both bold and red or if they are formatted in a specified Microsoft® Word style. RMTrak recognizes the end of requirements by their ending paragraph tag (¶) or by the character you specify in RMTrak's project settings.

Note: Your organization's project might or might not include product development. Many organizations, and most of the organizations using RMTrak, are familiar with product life-cycles; however, if your organization is not developing a product, *project life-cycle* seems more appropriate. For these reasons, the words *project* and *product* are used interchangeably in this document.

Tags can consist of any unique, memorable set of letters or numbers you create. We recommend you organize your tags consistently by placing the project acronym at the start of each tag, then the document name's acronym, and then the requirement's number, all separated by colons.

For example, a requirement might look like:

```
RATM:SHA:1 Circuit shall be designed to minimize impact of faulty ground.
```

The above example is the Number 1 Requirement listed in the Revolutionary Automated Teller Machine (RATM) project's System Hazards Analysis (SHA) document. The number of the tag (1) is an arbitrary number and doesn't have significance other than being a unique identifier for the requirement. The final paragraph mark (¶) is a requirements terminator that lets RMTrak know you have finished writing about that requirement.

Tip: You can configure RMTrak to recognize requirements in a specified Microsoft® Word style instead of bold, red formatting. You can also configure RMTrak to recognize any special symbol or character instead of a paragraph mark (¶). To do this, from RMTrak's **Setup** menu, choose **Options**.

Tags In Multiple Projects

If your organization has multiple ongoing projects requiring similar requirements, it might be redundant to create a new document for each project. In this case, one document, such as a PRD, could be used for two or more projects.

In the below example, a project called the Revolutionary Automated Teller Machine (RATM) has three divisions: RATM (the machine), RATMN (the RATM Network), and RATMW (the RATM Wireless). Both the RATMN and the RATMW include the RATM requirements, but the RATMN and RATMW also have additional, separate requirements. In the document, this can be shown as follows:

```
Requirements for the RATM:
```

```
RATM:PRD:1 The system will dispense money.
```

```
RATM:PRD:2 The system will use encryption when transferring PINs.
```

```
Additional requirements for the wireless system only:
```

```
RATMW:PRD:3 The system will have wireless access.
```

```
Additional requirements for the network system only:
```

```
RATMN:PRD:4 The system will have network access.
```

Unfortunately, this might cause problems for most requirements management tools.

The Problem with Most Requirements Management Tools

Once you import the above requirements into a requirements management tool, most tools would confuse the tags and include all of them in both projects. Because you don't want the RATMW tags in the RATMN project, and you don't want the RATMW tags in the RATMN project, you need a way to tell RMTrak that:

- In the RATMN project, you'd like to include only the RATMN and RATM tags.
- In the RATMW project, you'd like to include only the RATMW and RATM tags.

The RMTrak Solution: A Tag Filter

RMTrak's solution to this problem is a tag filter that allows your project to ignore tags intended for other projects.

How to Use RMTrak's Tag Filter

Using the Tag Filter is easy. After creating two separate projects in RMTrak (one for RATMN and another for RATMW), simply configure each project's tag filter with the tags it should recognize.

First, open the Tag Filter manager from the **Setup** menu. Type the tag you want to have RMTrak recognize for the project (including its colon and followed by an asterisk [*]), and then click **New**. Click **Done** when you are finished adding tag(s). RMTrak will recognize only requirements beginning with the tags you specified.

For example, in the RATMN project, you would add these tags to the tag filter:

```
RATM : *  
RATMN : *
```



Figure 1: Tag Filter setup manager with RATM:* being typed in the **New** box.

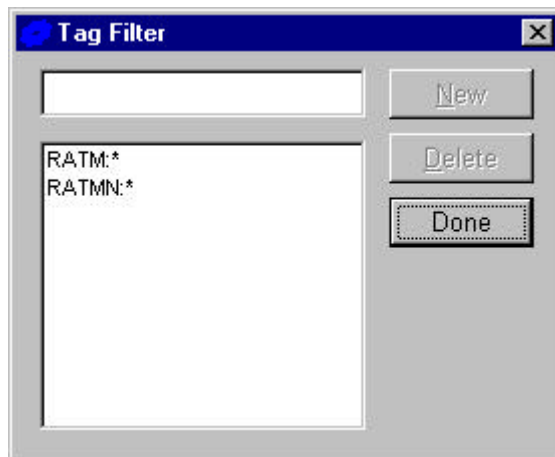


Figure 2: Tag Filter setup manager with the RATM:* and RATMN:* tags added

This tells RMTrak that the RATMN reports and views should only recognize tags if they begin with RATM: or RATMN: (and ignore all other tags).

In the RATMW project, you would add these tags to the filter:

RATM:*
RATMW:*



Figure 3: Tag Filter setup manager with the RATM:* and RATMW:* tags added

This tells RMTrak that the RATMW reports and views should only recognize tags if they begin with RATM: or RATMW: (and ignore all other tags).

This will make sure that both projects include the general requirements, but don't include the specific requirements of the other, related project.

Successfully Using the Tag Filter

RBC Product Development is dedicated to helping you succeed. If you need additional information about RMTrak or its Tag Filter, please don't hesitate to contact us or visit our RMTrak Web site.

RMTrak Web site: <http://www.RMTrak.com>

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