



## Export a section of the EHR-S FM using RTF

For the development of a Functional Profile several stakeholders are involved to review the EHR-S FM or an existing Functional Profile. The goal of the review is to determine if and how a function and its criteria shall be included in the Functional Profile. The review can take place in several ways.

### 1. Review with the EHR-S FM Tool

The most ideal way is to use the EHR-S FM tool and include or exclude functions and criteria right away when reviewing them. If adjustments are needed, this can be done right away or in a later stage. In the ChangeNote a remark can be made for this. You can also use the EA functionality Project Status for keeping track of tasks still to do. However, the project facilitator, the person who can work with the tool, needs to be present to do so. Is the project facilitator not able to attend an export in a table can be made for review.

### 2. Review using an export in RTF (Rich Text Format document)

An export in EA of a part of the EHR-S FM R2 can be made. The assumption is that you want to create a new Functional Profile derived from a Base Model. The Base Model is reviewed by the project team. If you want to use an export for that review you need a template for the RTF export. To import this template and then export a RTF document, follow the next steps:

- Select the project of which you want to have an export.
- Select Project in the top navigation of EA or press F8. See figure 1.

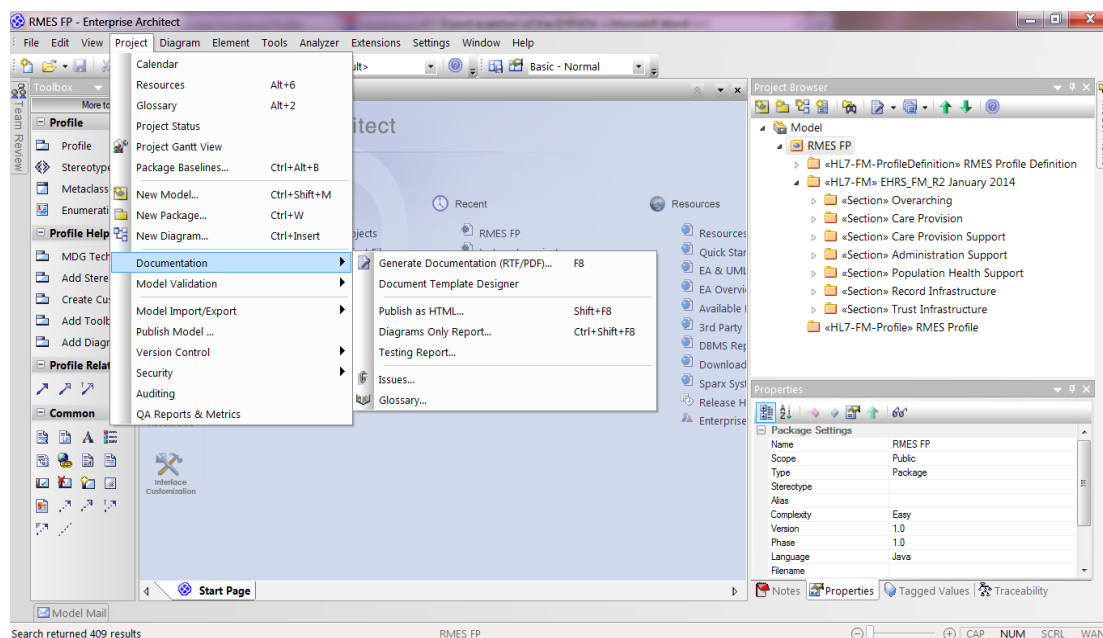


Figure 1. Generate documentation in EA.



- A window pops up (see figure 2) in where you can import the template you want to use for the export in RTF.
- Select 'New Template', see figure 2.

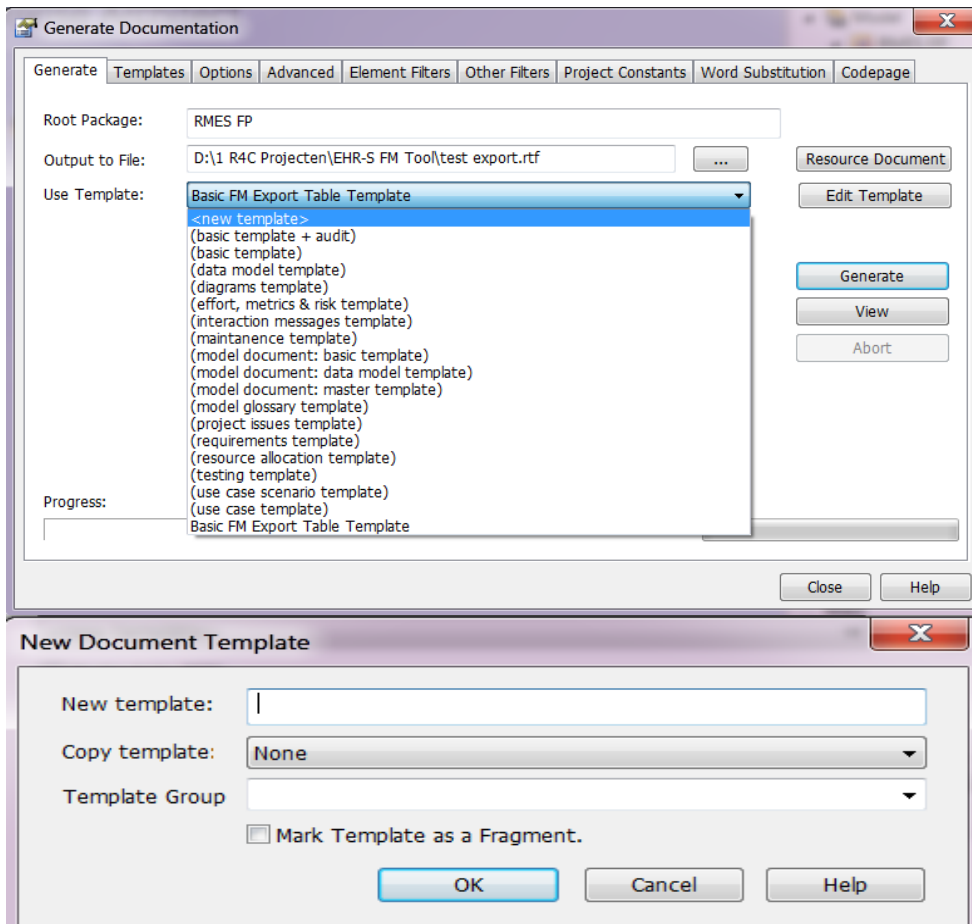


Figure 2. Window Generate Documentation.

- Type name of new template and click OK.
- In EA the window for creating a template or import a template for a RTF document opens. See figure 3.

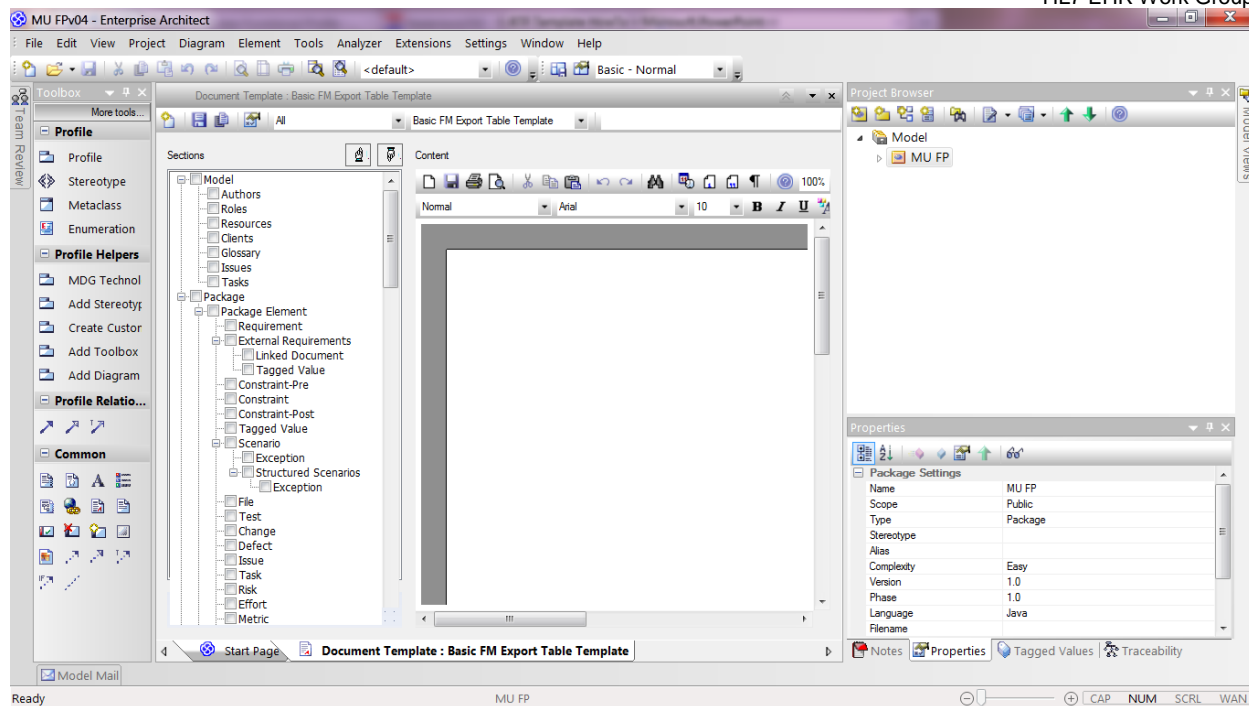


Figure 3. RTF Document, template definition.

- Right click on the blank document field.
- Select File and then Import. See figure 4.
- The Window Explorer opens. Select the folder in where you saved the template (in this case the template with the name 'Basic FM Export Table Template') and click OK. You will see that the blank document field is now filled with the definition of the template. See figure 5.

**NOTE:** the template needs to be imported in every eap file in where you want to have the template. So if you want to have the template in your eap in where you want to create a new Functional Profile, select that eap either in Windows Explorer or in EA (Start page, Projects).

In other words, if you are creating multiple new Functional Profiles and you want to use the template, you need to import this template in every project you created for every new Functional Profile.

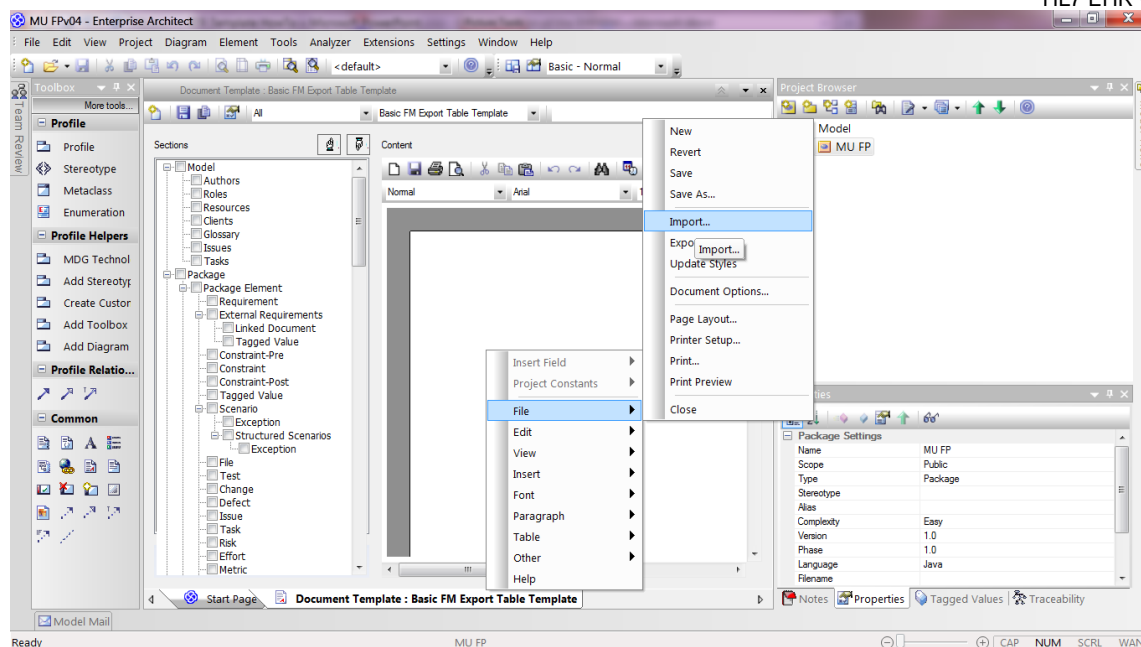


Figure 4. The import of an existing template.

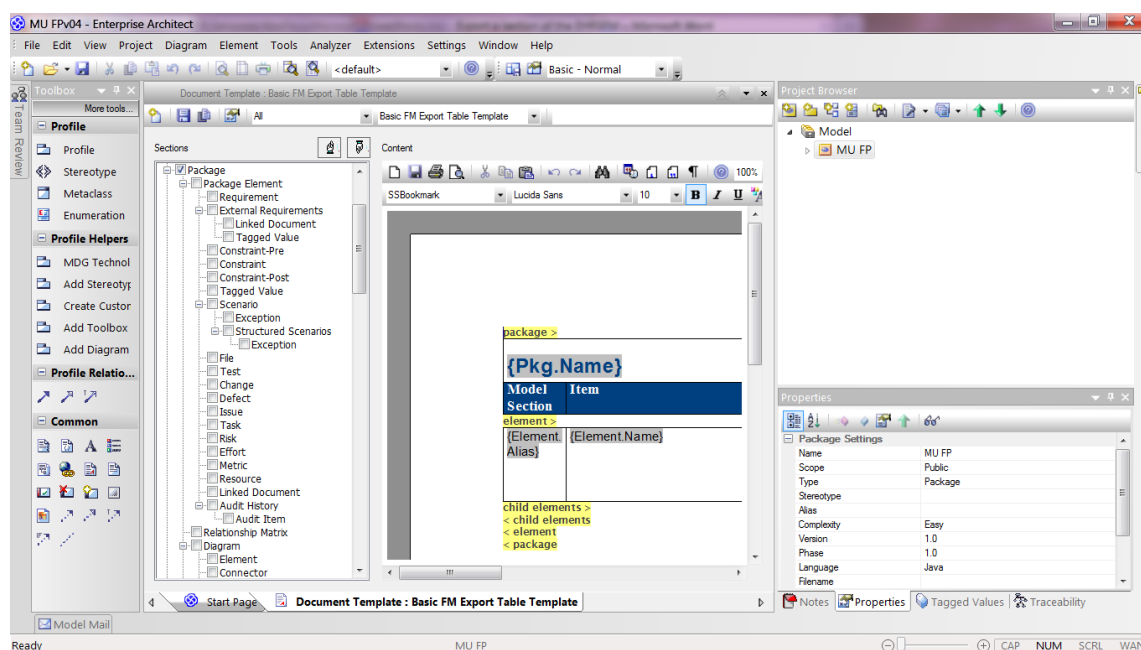


Figure 5. Document Template.

- Don't forget to save the template. See figure 6.

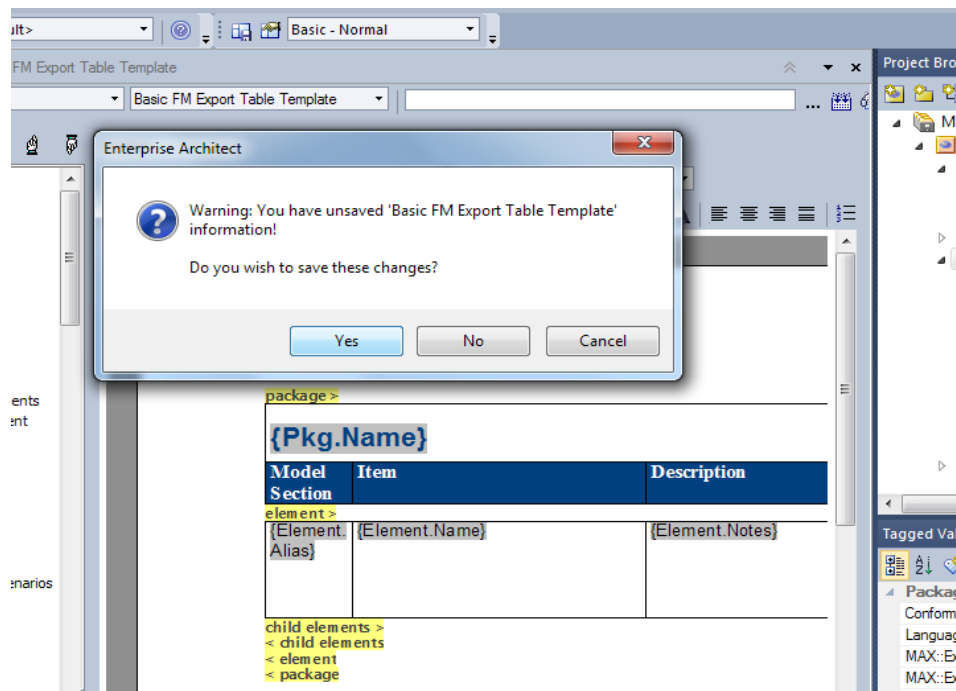


Figure 6. Save the imported template.

- Now you can go and export a part of the Base Model into a RTF with the use of the template.
- Select the section (package level) in the Base Model you want to export.
- Right click or press F8. See figure 1.
- Select the template you want to use for the export. See figure 7.
- EA will give you a message saying that the document is successfully exported. See figure 7.
- The export is a table in a RTF document.

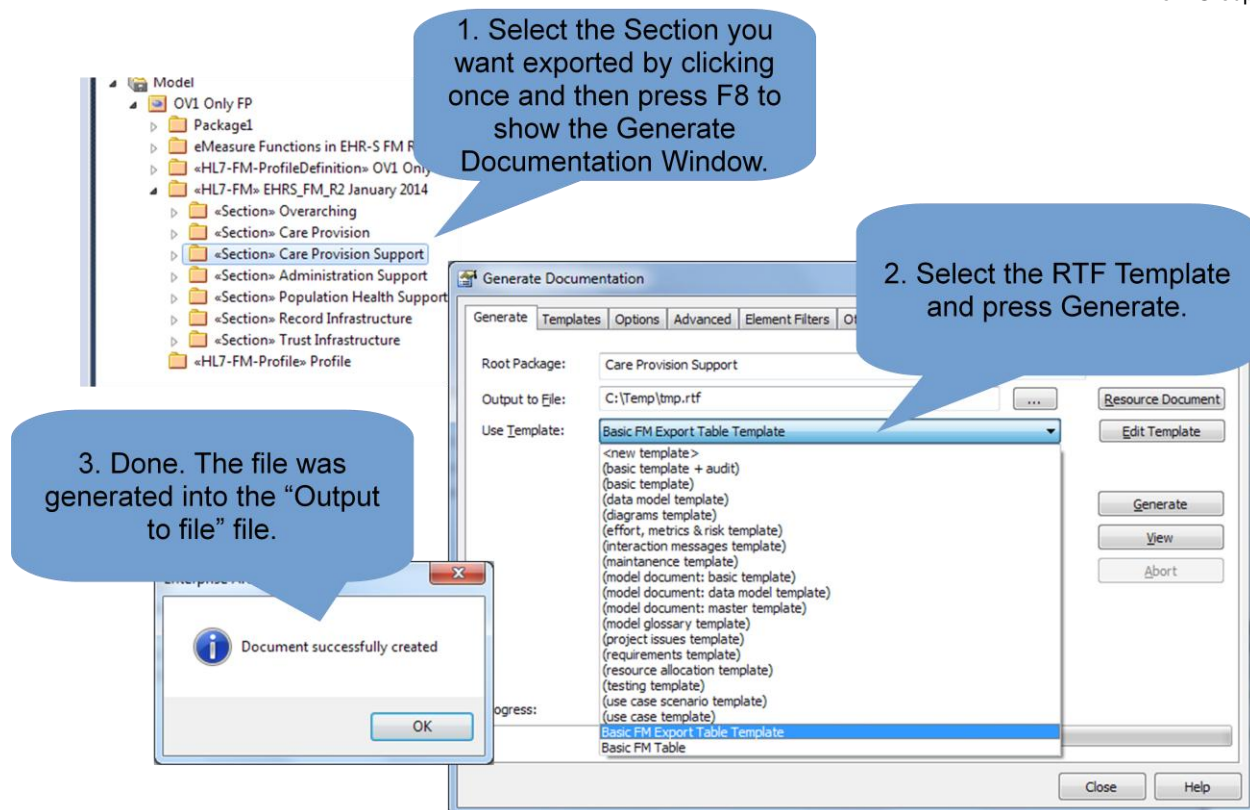


Figure 7. Export of a RTF document.

In the word document there are several non readable codes. You can cleanup these with the use of Word search/replace functionality.

- Open the export document using Word.
- Use CTRL H to open the search and replace window.
- Do the search and replace actions as mentioned in figure 8.

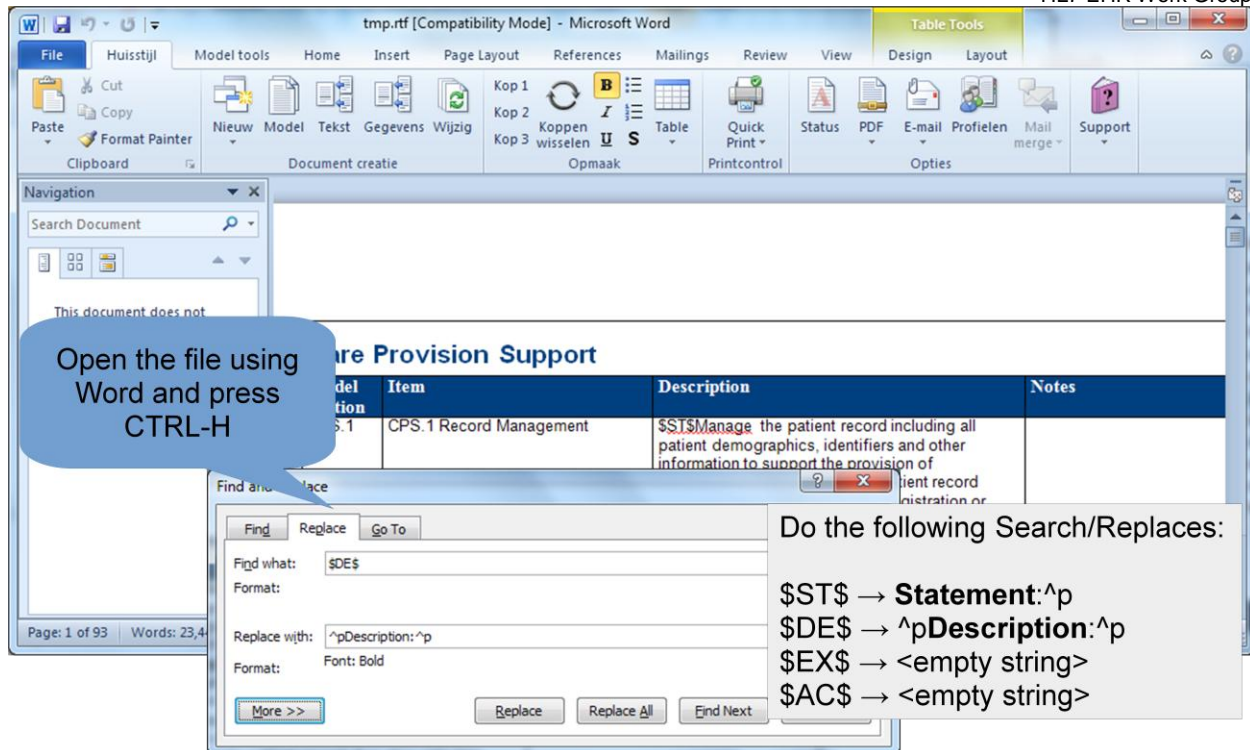


Figure 8. Use Word Search/Replace to Cleanup

Now you have a word document that you can use in your project team for the review of a part of the Base Model. Decisions and changes that were made in this document you can execute with the EHR-S FM Tool to create the Profile Definition.

### 3. Review on an export of search results

In the EHR-S FM Tool it is possible to search for the non-shall criteria in a section. In most Functional Profile types the criteria with optionality 'shall' will be inherited from the Base Model. The non-shall criteria need review on optionality and text.

- Select a section in where you want to do a search on non-shall criteria.
- Select Edit in the top navigation and select Find in project. See figure 9.



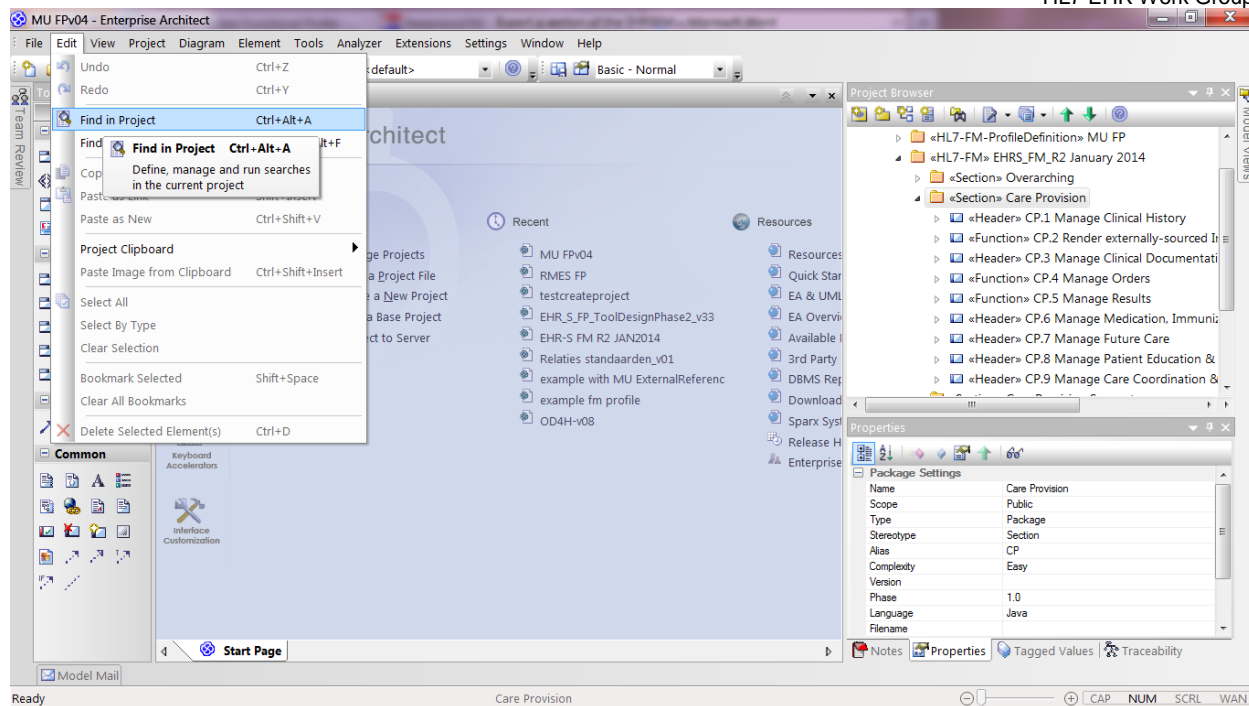


Figure 9. Search in section of Base Model.

- The search window will open.
- Select Find non-shall in the Search Field. See figure 10.
- Select Run next to the Search field.



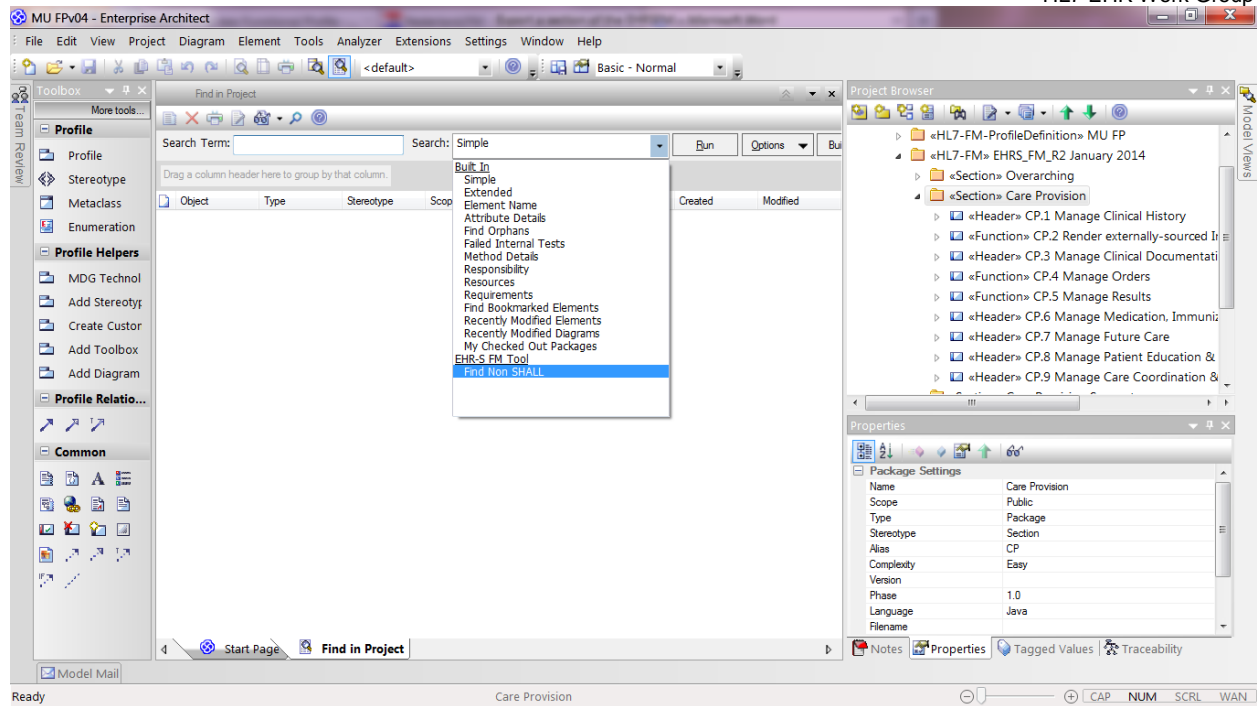


Figure 10. Search on non-shall criteria.

The search results are shown in EA.

- Select all results.
- Right click and select Documentation and then RTF report on selected items. See figure 11.
- The window Generate documentation will open. See figure 7.
- Follow the same steps as mentioned for figure 7.

