

REQUIREMENTS TRACEABILITY MATRIX

Editable Word Template for Project Management

Control requirements from source to deliverable, verification, acceptance, and sign-off.

Document Profile

Project Name	[Enter project name]
Project ID / Code	[Enter project code]
Project Manager	[Enter name]
Business Owner / Sponsor	[Enter name]
Document Version	v1.0
Date Prepared	[DD Month YYYY]
Prepared By	[Enter name / team]
Confidentiality	[Internal / Confidential / Public]

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1. Template Purpose

Use this section to understand the role of the RTM before filling the matrix.

This Requirements Traceability Matrix (RTM) template is used to document, map, monitor, and control project requirements from their origin through planning, delivery, testing, approval, and closure. It supports forward traceability, backward traceability, and bidirectional traceability depending on the level of governance required.

The template is suitable for software projects, construction projects, process improvement initiatives, compliance projects, product launches, vendor implementations, and any project where requirements must be tracked against deliverables and acceptance evidence.

Source Control	Delivery Mapping	Verification Evidence
Records who requested the requirement, where it came from, and why it matters.	Links each requirement to WBS items, deliverables, design references, build items, and owners.	Maps requirements to test cases, acceptance criteria, approvals, and current completion status.

2. How to Use This Template

Replace all bracketed text with project-specific information and update the matrix regularly.

1. Collect approved business, stakeholder, technical, regulatory, and operational requirements.
2. Assign one unique Requirement ID to every requirement before adding it to the matrix.
3. Link each requirement to a business objective, deliverable, WBS element, design/build reference, and verification method.
4. Update the status whenever requirements are approved, changed, implemented, tested, accepted, deferred, or rejected.
5. Use the Change Impact Log before changing any approved requirement, deliverable, test case, priority, or acceptance criteria.
6. Review unresolved gaps with stakeholders before phase-gate approval, UAT, release, handover, or project closure.

Traceability Direction

Selection	Direction	When to Use
☐ Forward Traceability	Requirement -> design/build/deliverable/test	Use to confirm every approved requirement is being delivered and verified.
☐ Backward Traceability	Deliverable/test -> original requirement	Use to prevent extra work, gold plating, and scope creep.
☐ Bidirectional Traceability	Requirement <-> deliverable/test/acceptance	Use for audits, compliance, complex projects, regulated work, and high-risk programs.

3. RTM Governance and Document Control

Define ownership, update rules, approval authority, and review frequency.

RTM Owner	[Name and role responsible for maintaining this matrix]
Requirement Approval Authority	[Sponsor / Product Owner / Change Control Board / Client]
Update Frequency	[Daily / Weekly / Sprint Review / Phase Gate / As changes occur]
Repository Location	[SharePoint / Teams / Google Drive / PMIS / File path]
Baseline Date	[Date requirements are formally baselined]
Change Control Method	[CR form / Jira workflow / CCB decision / formal approval email]

Version History

Version	Date	Author	Summary of Change	Approved By
0.1	[DD/MM/YYYY]	[Name]	Initial draft created for stakeholder review.	[Name]
1.0	[DD/MM/YYYY]	[Name]	Baseline version approved.	[Name]
1.1	[DD/MM/YYYY]	[Name]	[Describe update]	[Name]

4. Requirement Source Register

Capture where requirements come from before tracing them through the project.

Use this register to identify the authoritative source of each requirement. Examples include business case, scope statement, contract, regulation, stakeholder interview, customer request, user story, process map, audit finding, change request, or workshop output.

Source ID	Source Type	Source Owner / Reference	Date Captured	Requirement Category	Notes
SRC-001	[Stakeholder / document / regulation]	[Name / title]	[Date]	[Business / Functional / Non-functional / Compliance]	[Notes]
SRC-002	[Stakeholder / document / regulation]	[Name / title]	[Date]	[Business / Functional / Non-functional / Compliance]	[Notes]
SRC-003	[Stakeholder / document / regulation]	[Name / title]	[Date]	[Business / Functional / Non-functional / Compliance]	[Notes]

5. Master Requirements Traceability Matrix

Main editable matrix. Add more rows as required and keep every trace link current.

Instruction: Keep one row per requirement. Where a requirement maps to multiple deliverables or test cases, list each reference clearly or duplicate the row for stronger audit traceability.

Req ID	Category	Requirement Statement	Source / Requester	Priority	Business Objective / Value	Deliverable / WBS	Verification / Test Case	Owner	Status / Date
REQ-001	Functional	Users must be able to [describe capability] so that [business outcome].	SRC-001 / [Name]	High	[Objective or KPI supported]	[Deliverable / WBS #]	[TC-001 / Review / Demo / UAT]	[Owner]	Proposed / [Date]
REQ-002	Non-functional	The solution must meet [performance, security, usability, availability, capacity, or quality requirement].	SRC-002 / [Name]	Medium	[Objective or KPI supported]	[Deliverable / WBS #]	[TC-002 / Inspection / Audit]	[Owner]	Approved / [Date]
REQ-003	Compliance	The project must comply with [standard, policy, legal, regulatory, or contract requirement].	SRC-003 / [Name]	High	[Compliance / risk reduction]	[Deliverable / WBS #]	[Evidence / Compliance check]	[Owner]	In Progress / [Date]
REQ-004	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]
REQ-005	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]
REQ-006	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]
REQ-007	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]
REQ-008	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]
REQ-009	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]
REQ-010	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]
REQ-011	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]

Req ID	Category	Requirement Statement	Source / Requester	Priority	Business Objective / Value	Deliverable / WBS	Verification / Test Case	Owner	Status / Date
REQ-012	[Category]	[Write requirement clearly and measurably]	[Source ID / requester]	[High/Med/Low]	[Business objective]	[Deliverable / WBS]	[Test case / verification]	[Owner]	[Status / date]

Coverage Status Legend

Status	Meaning	Required Action
Proposed	Requirement captured but not yet approved.	Owner to clarify source, value, and acceptance criteria.
Approved	Requirement accepted into scope baseline.	Trace to deliverable, design/build, and verification evidence.
Implemented	Work item or deliverable completed.	Confirm test coverage and acceptance evidence.
Verified	Requirement passed verification or testing.	Prepare stakeholder acceptance or closure evidence.
Accepted	Sponsor/client/business owner accepted the requirement.	Lock evidence and update closure package.
Deferred / Rejected	Requirement not delivered in current scope.	Record decision, approval, and impact.

6. Detailed Requirement Record

Use this page when a requirement needs more detail than the master matrix can hold.

Requirement ID	[REQ-###]
Requirement Title	[Short requirement name]
Requirement Statement	[Write the requirement as a clear, testable statement]
Rationale / Business Need	[Why the requirement exists and what value it supports]
Source / Requester	[Source ID, stakeholder name, document, regulation, or change request]
Category	[Business / Functional / Non-functional / Technical / Compliance / Transition]
Priority	[Must / Should / Could / Won't for now OR High / Medium / Low]
Assumptions	[Known assumptions supporting this requirement]
Constraints	[Schedule, budget, legal, technical, resource, quality, vendor, or operational constraints]
Dependencies	[Requirements, systems, vendors, approvals, data, people, or tasks required first]
Acceptance Criteria	[Specific conditions that prove the requirement is acceptable]
Verification Method	[Test / Inspection / Review / Demonstration / Analysis / Audit / UAT]
Current Status	[Proposed / Approved / In Progress / Implemented / Verified / Accepted / Deferred / Rejected]
Owner	[Name and role]

7. Implementation and Verification Mapping

Trace requirements to WBS, design, build, test, and acceptance evidence.

Req ID	WBS	Design Ref	Build / Work Item	Test Case	Test Status	Evidence Location	Acceptance
REQ-001	[WBS #]	[Design / specification ref]	[Task / build item / backlog ID]	TC-001	[Pass / Fail / Not Run]	[Evidence link / location]	[Accepted by / date]

Requirements Traceability Matrix Template

Req ID	WBS	Design Ref	Build / Work Item	Test Case	Test Status	Evidence Location	Acceptance
REQ-002	[WBS #]	[Design / specification ref]	[Task / build item / backlog ID]	TC-002	[Pass / Fail / Not Run]	[Evidence link / location]	[Accepted by / date]
REQ-003	[WBS #]	[Design / specification ref]	[Task / build item / backlog ID]	TC-003	[Pass / Fail / Not Run]	[Evidence link / location]	[Accepted by / date]
REQ-004	[WBS #]	[Design / specification ref]	[Task / build item / backlog ID]	TC-004	[Pass / Fail / Not Run]	[Evidence link / location]	[Accepted by / date]
REQ-005	[WBS #]	[Design / specification ref]	[Task / build item / backlog ID]	TC-005	[Pass / Fail / Not Run]	[Evidence link / location]	[Accepted by / date]
REQ-006	[WBS #]	[Design / specification ref]	[Task / build item / backlog ID]	TC-006	[Pass / Fail / Not Run]	[Evidence link / location]	[Accepted by / date]
REQ-007	[WBS #]	[Design / specification ref]	[Task / build item / backlog ID]	TC-007	[Pass / Fail / Not Run]	[Evidence link / location]	[Accepted by / date]
REQ-008	[WBS #]	[Design / specification ref]	[Task / build item / backlog ID]	TC-008	[Pass / Fail / Not Run]	[Evidence link / location]	[Accepted by / date]

8. Requirement Change and Impact Log

Use this log to protect scope baseline and maintain an audit trail.

CR ID	Req ID	Change Requested	Reason / Source	Scope Impact	Time Impact	Cost Impact	Quality / Risk Impact	Decision	Date
CR-001	[Req ID]	[Change description]	[Reason / source]	[Scope]	[Schedule]	[Cost]	[Quality/Risk]	[Decision]	[Date]
CR-002	[Req ID]	[Change description]	[Reason / source]	[Scope]	[Schedule]	[Cost]	[Quality/Risk]	[Decision]	[Date]
CR-003	[Req ID]	[Change description]	[Reason / source]	[Scope]	[Schedule]	[Cost]	[Quality/Risk]	[Decision]	[Date]
CR-004	[Req ID]	[Change description]	[Reason / source]	[Scope]	[Schedule]	[Cost]	[Quality/Risk]	[Decision]	[Date]
CR-005	[Req ID]	[Change description]	[Reason / source]	[Scope]	[Schedule]	[Cost]	[Quality/Risk]	[Decision]	[Date]
CR-006	[Req ID]	[Change description]	[Reason / source]	[Scope]	[Schedule]	[Cost]	[Quality/Risk]	[Decision]	[Date]

9. RTM Quality Review Checklist

Complete before phase gate approval, UAT, release, handover, or project closure.

Done	Review Item
[]	Every approved requirement has a unique ID.
[]	Every requirement has a clear source, owner, category, and priority.
[]	Each requirement is linked to at least one deliverable, WBS item, or work item.
[]	Each requirement is linked to an appropriate verification method or test case.
[]	Acceptance criteria are specific, measurable, and agreed with the business owner.
[]	Changed requirements include a change request, decision, date, and impact analysis.
[]	Deferred or rejected requirements include approval and a reason.
[]	Unclear, duplicate, conflicting, or untestable requirements have been resolved.
[]	The RTM status matches project reports, sprint/backlog tools, and testing evidence.
[]	The final RTM has been reviewed and signed off before closure.

10. Review and Sign-Off

Record approval from the accountable business and project authorities.

Role	Name	Signature	Date	Comments
Project Manager	[Name]	[Signature]	[Date]	[Comments]
Business Owner / Sponsor	[Name]	[Signature]	[Date]	[Comments]
Product Owner / BA Lead	[Name]	[Signature]	[Date]	[Comments]
Quality / Test Lead	[Name]	[Signature]	[Date]	[Comments]
Client / Customer Representative	[Name]	[Signature]	[Date]	[Comments]

11. Field Definitions

Use this guidance to fill the template consistently.

Field	Explanation
Requirement ID	Unique identifier used to trace, discuss, change, test, and report each requirement.
Parent / Associate ID	Higher-level requirement or related requirement that the item supports or depends on.
Source	Original authority for the requirement, such as stakeholder, contract, regulation, business case, user story, or approved change request.
Priority	Relative importance or delivery order; commonly High/Medium/Low or Must/Should/Could/Won't for now.
Business Objective	Project objective, business outcome, KPI, benefit, or client value supported by the requirement.
Deliverable / WBS	Project deliverable, milestone, WBS element, backlog item, or work package that satisfies the requirement.
Verification Method	How the team proves the requirement has been met: test, inspection, demonstration, review, analysis, audit, or UAT.
Status	Current progress condition such as Proposed, Approved, In Progress, Implemented, Verified, Accepted, Deferred, or Rejected.
Acceptance Criteria	Specific conditions that must be true before stakeholders can accept the requirement.
Evidence Location	Link, document path, test report, signed form, screenshot, demo record, or audit record supporting verification and acceptance.

12. Sources Consulted for Template Structure

These references informed the RTM fields and workflow used in this template.

Source	Reference	How It Was Used
Project Management Institute (PMI)	Critical Success Factors - Professional Requirements Management	Explains requirements documentation, requirements management plan, and RTM as requirements management outputs, and lists typical RTM content such as source, owner, status, test scenarios, assumptions, objectives, and value.
Atlassian	Requirements Traceability Matrix Template	Emphasizes linking requirements to tasks, test cases, deliverables, dependencies, lifecycle visibility, and stakeholder communication.
Asana	Requirements Traceability Matrix Template	Describes RTM relationships between requirements and artifacts, many-to-many traceability, types of traceability, key fields, and regular updates.
Project Management, 2nd Edition	4.3 Requirements Traceability Matrix	Lists common fields such as Requirement ID, status, business needs, WBS, design ID, build ID, and test cases.

End of Requirements Traceability Matrix Template