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Clarity Business Rules

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Introduction to Business Rules

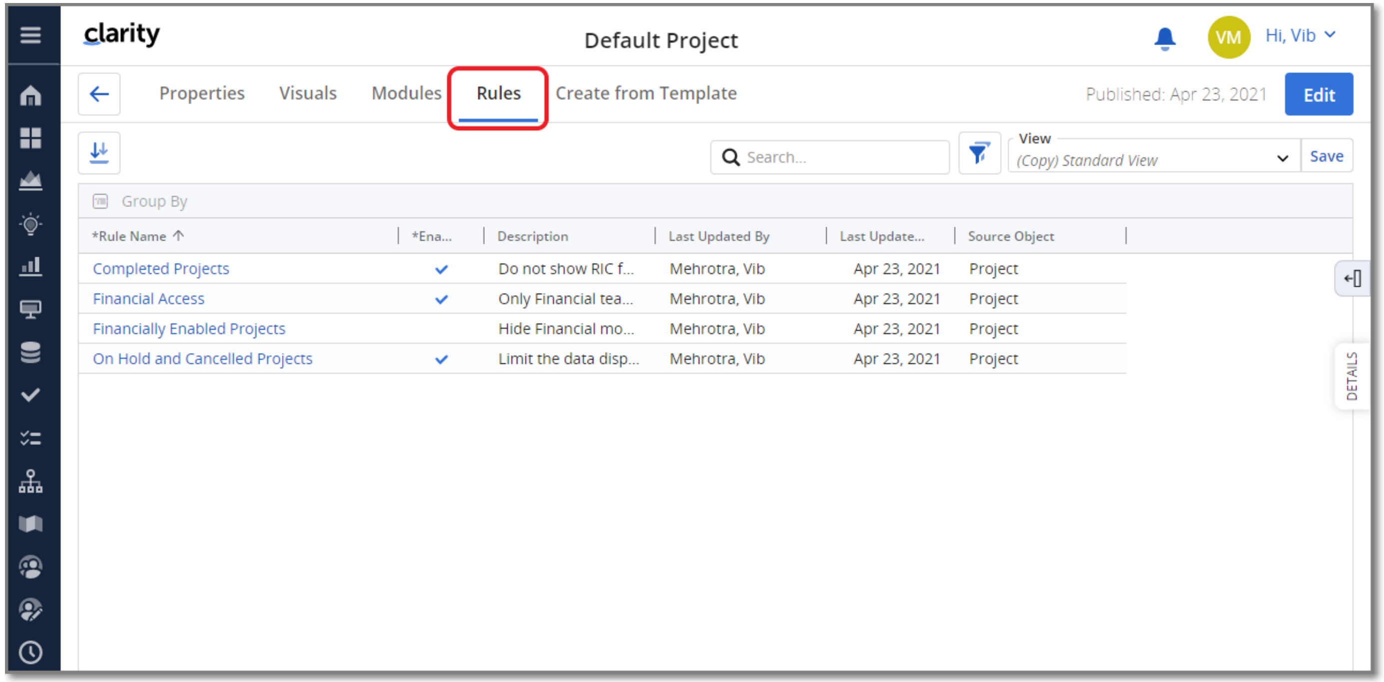
- In 15.9.2 we released Business Rules to our customers and further enhanced in 15.9.3

- Reduce the need for many current workflows, additional blueprints, and complex security configurations

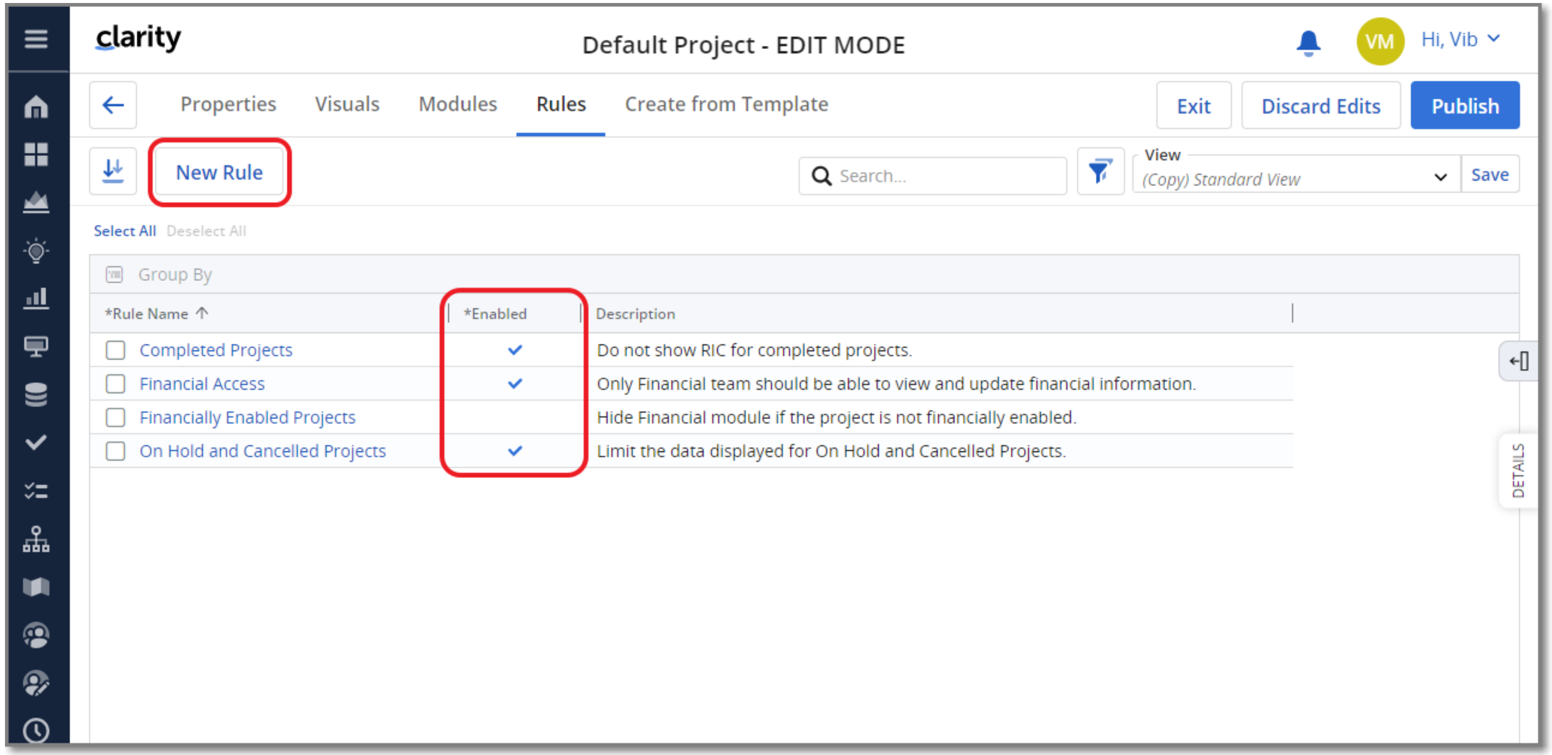
- Examples
  - Hide/show modules/sections based on access group or some set of attributes
  - Making an entire record read only based on access group or attribute conditions
  - Enforcing Blueprint specific required fields for Projects

Business Rules

- Rules are defined within an object blueprint.
- Rules will automatically perform the action once defined conditions are met.
- Rules can be defined for:
  - Project
  - Ideas
  - Custom Object
  - Custom Investment Type
- Multiple rules can be defined within the same blueprint.
- Different blueprints can have different rules.



Business Rules - Configuration



- Business rules are configured within a blueprint (in edit mode)
- Each Rule will have at least one condition (or set to Always True) and at least one Action
- Individual rules can be enabled or disabled.
- Common grid functionality is available for managing rules.

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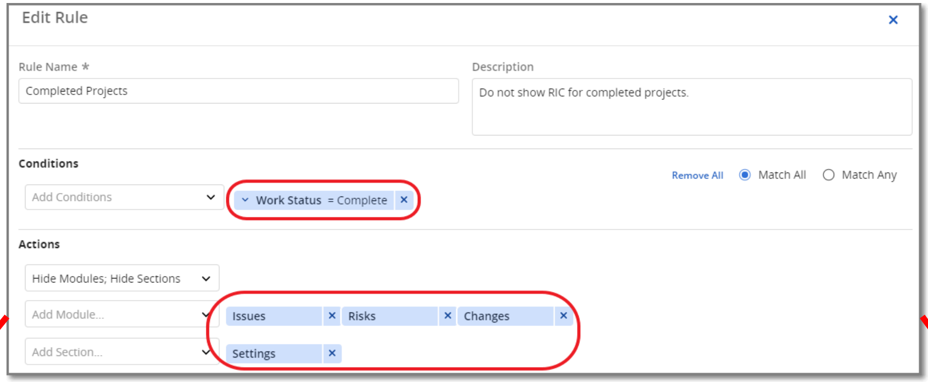
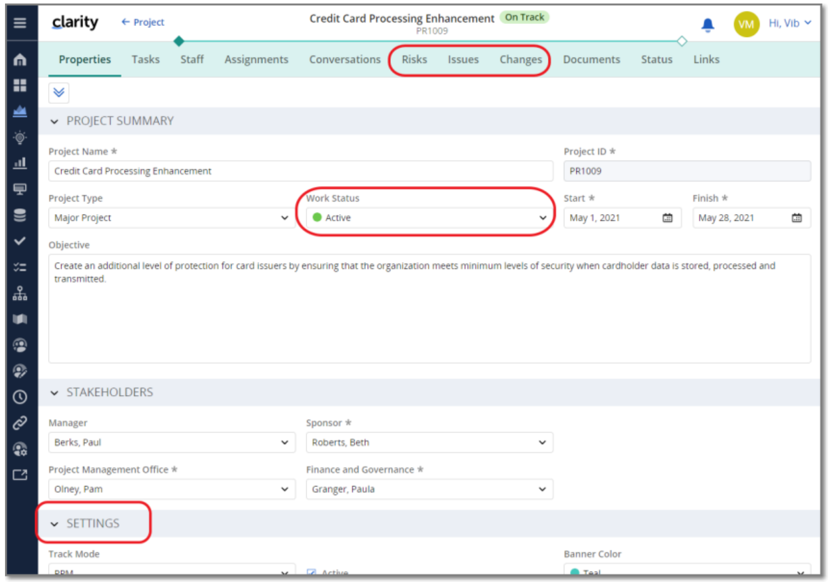
Controlling the display of Sections and Modules

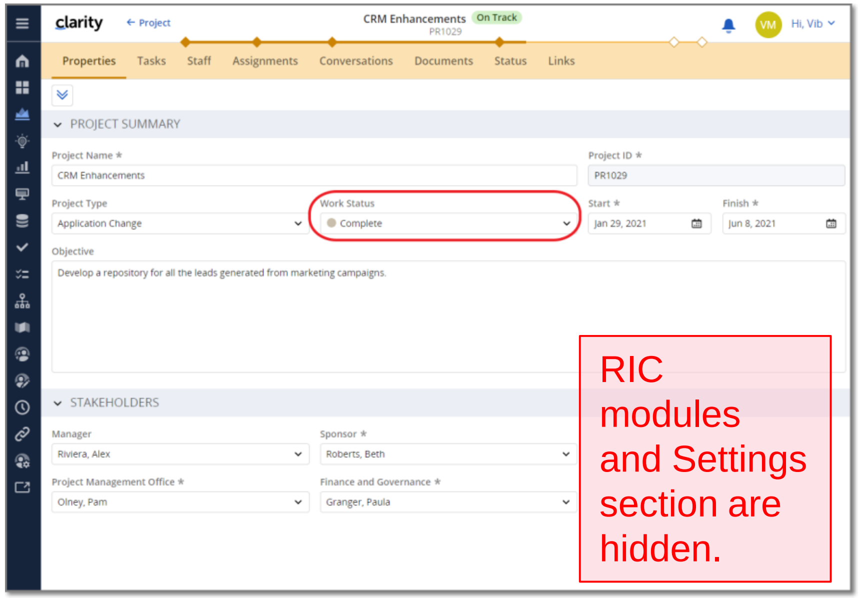
- Sections and Modules can be hidden with Blueprint specific rules

- Based on field conditions and/or security access

- Multiple rules can be leveraged to provide the desired user experience







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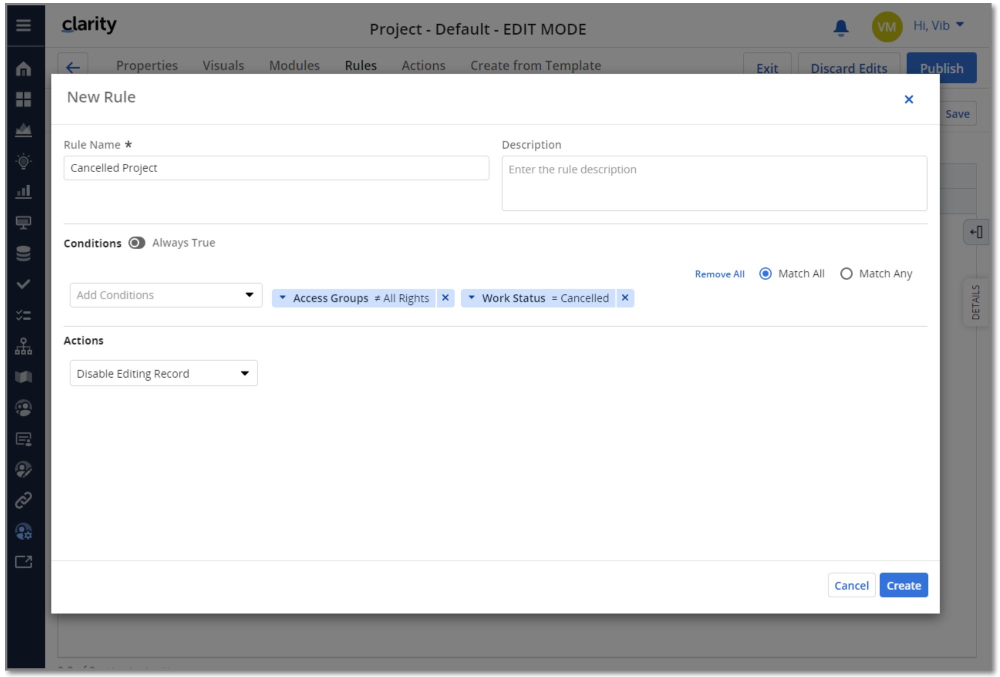
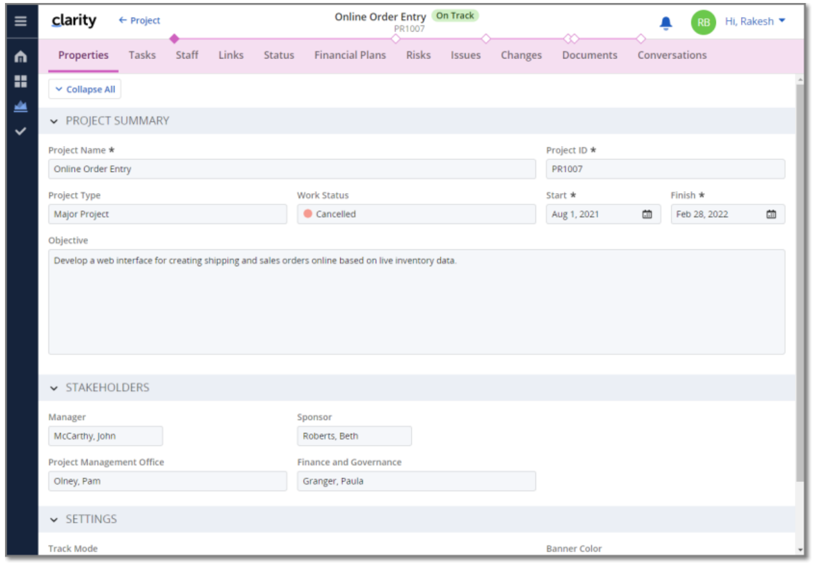
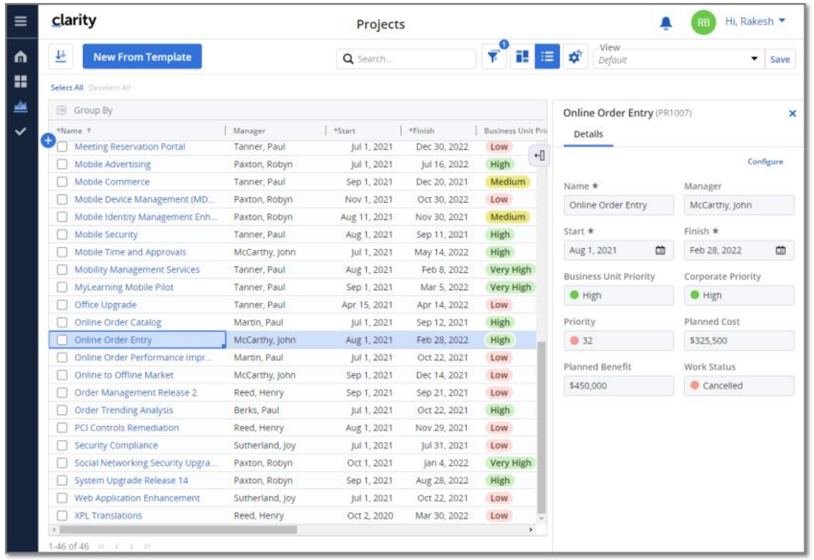
Making the entire record read only

- Rule to make the entire record read only.
- When executed every field in the record becomes read only.
  - No changes to the sub-object records.
- Record becomes read only in:
  - Properties
  - Fly-outs
  - Grid







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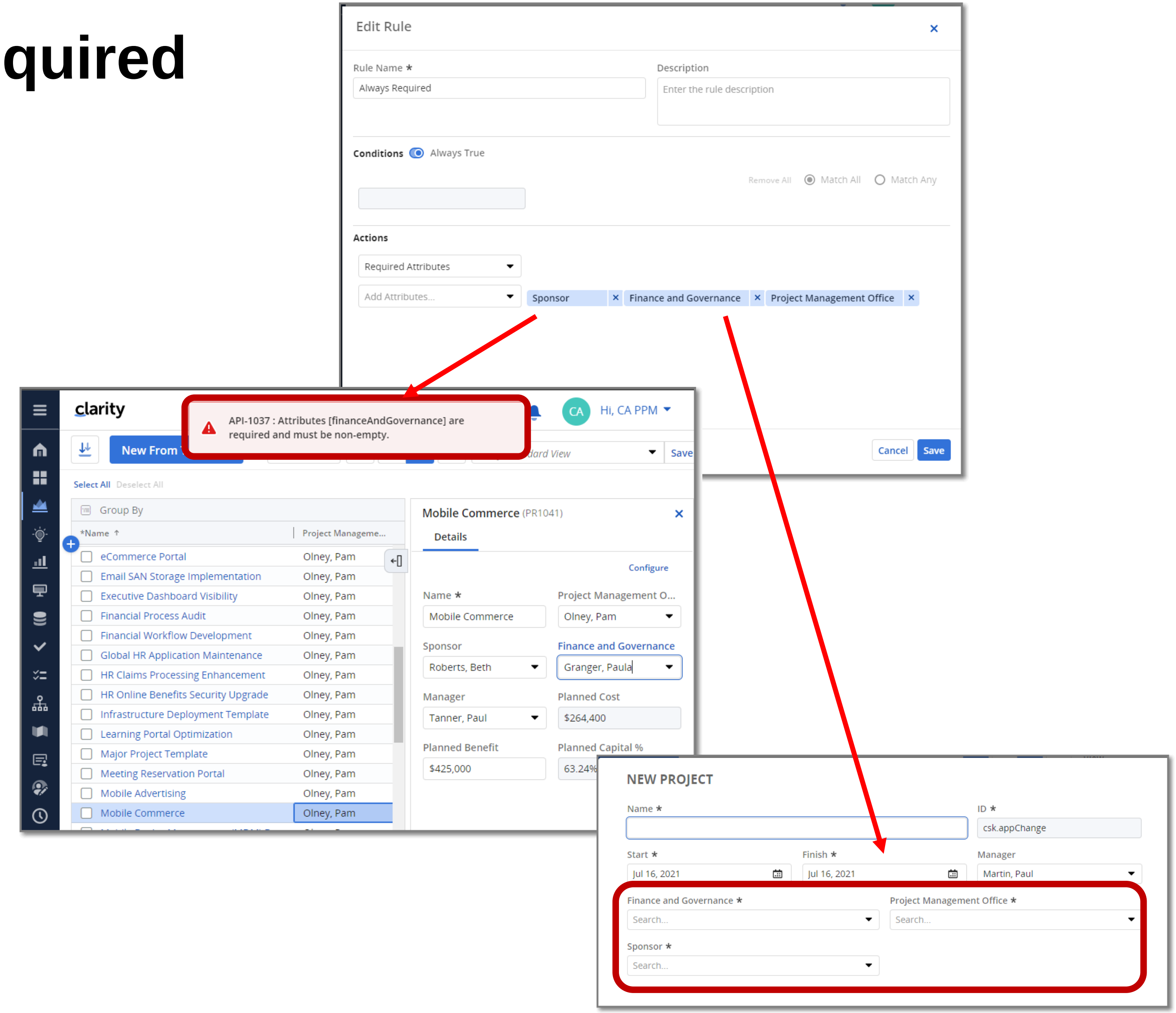
Enforcing attribute to be required

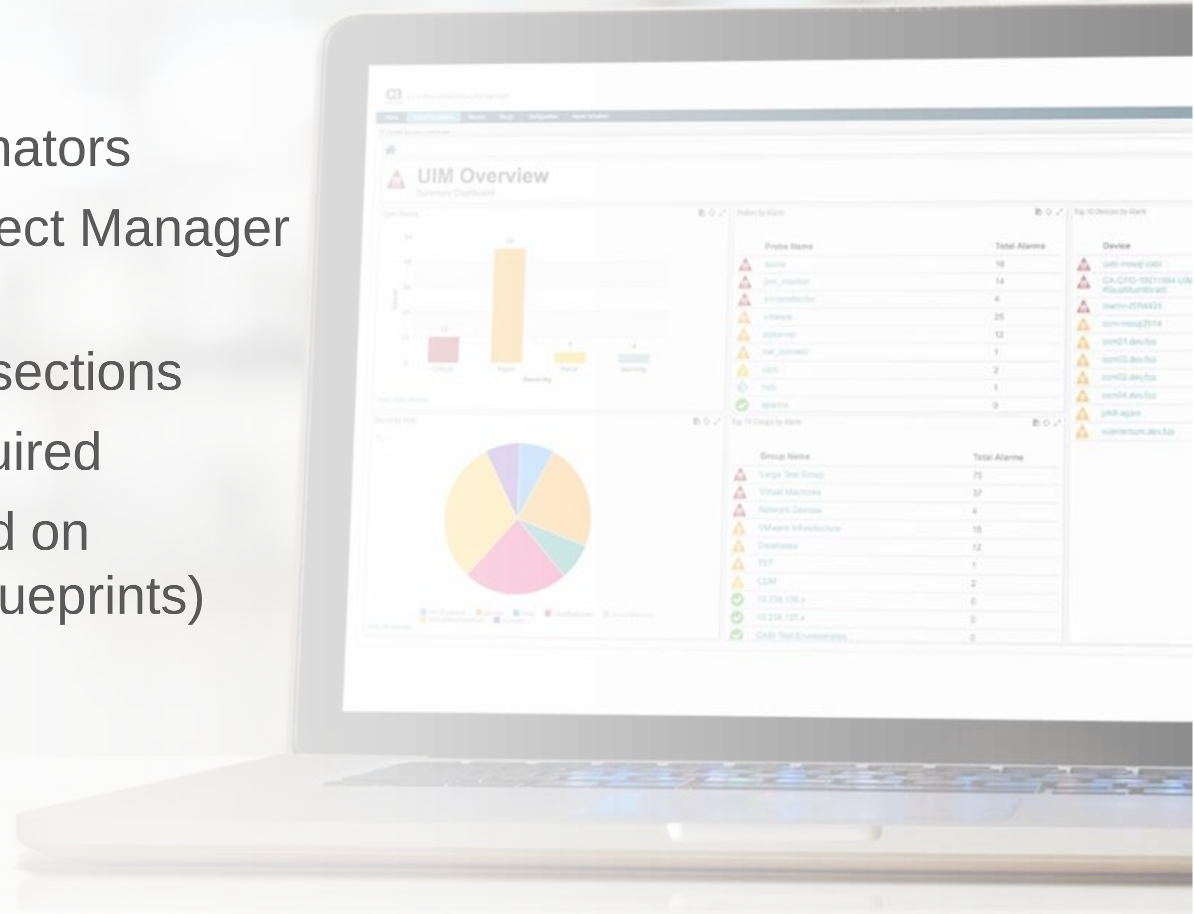
- This action is only possible for Project blueprints.
- Ability to require an attribute based on blueprint.
- Required attributes can only be set when the condition is set to “Always True”.
- Can require any number of attributes.
- Required attributes are enforced in create modal, properties, fly-out, and grid layout.
- Ability for customers to enforce blueprint specific require fields at the time of project creation.



Demonstration

What are some of the cool things you can do with Business Rules?

- JIT Modules based on project work status or stage
- Streamline the layout of a Project for Project Coordinators
- If a project is put On Hold, lock entire record for Project Manager (leaving record open for Governance team)
- If financial status is set to Hold, hide financial plans/sections
- Blueprint specific required field; make Objective required
- Changing the fields displayed for Strategy CIT based on Framework selected (reduce the need for multiple blueprints)



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Questions?

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