



# 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

**Simple**



Making it easier for your organization to get what you need

# 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.

The screenshot displays the 'clarity' software interface. At the top, the 'Default Project' title is visible. Below it, a navigation bar includes tabs for 'Properties', 'Visuals', 'Modules', and 'Rules', with 'Rules' being the active tab and highlighted by a red rectangle. To the right of the 'Rules' tab is a 'Create from Template' button. The main content area shows a table of rules. The table has columns for '\*Rule Name', '\*Ena...', 'Description', 'Last Updated By', 'Last Update...', and 'Source Object'. Four rules are listed: 'Completed Projects', 'Financial Access', 'Financially Enabled Projects', and 'On Hold and Cancelled Projects'. Each rule has a blue checkmark in the '\*Ena...' column. The 'Source Object' for all rules is 'Project'. A search bar and a 'View' dropdown are located above the table. On the left side of the interface, there is a vertical sidebar with various icons. On the right side, there is a 'DETAILS' button.

*Rule Name ↑	*Ena...	Description	Last Updated By	Last Update...	Source Object
Completed Projects	✓	Do not show RIC f...	Mehrotra, Vib	Apr 23, 2021	Project
Financial Access	✓	Only Financial tea...	Mehrotra, Vib	Apr 23, 2021	Project
Financially Enabled Projects	✓	Hide Financial mo...	Mehrotra, Vib	Apr 23, 2021	Project
On Hold and Cancelled Projects	✓	Limit the data disp...	Mehrotra, Vib	Apr 23, 2021	Project

# 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.

The screenshot shows the 'Default Project - EDIT MODE' interface in Clarity. The 'Rules' tab is selected, and a 'New Rule' button is highlighted with a red box. Below the tab, there is a search bar and a 'View' dropdown set to '(Copy) Standard View'. A table lists four rules, with the '\*Enabled' column highlighted by a red box. All rules are currently enabled, indicated by blue checkmarks.

*Rule Name ↑	*Enabled	Description
<input type="checkbox"/> Completed Projects	✓	Do not show RIC for completed projects.
<input type="checkbox"/> Financial Access	✓	Only Financial team should be able to view and update financial information.
<input type="checkbox"/> Financially Enabled Projects	✓	Hide Financial module if the project is not financially enabled.
<input type="checkbox"/> On Hold and Cancelled Projects	✓	Limit the data displayed for On Hold and Cancelled Projects.

# 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

Edit Rule

Rule Name \*  
Completed Projects

Description  
Do not show RIC for completed projects.

Conditions  
Add Conditions ▼ Work Status = Complete X

Remove All Match All Match Any

Actions  
Hide Modules; Hide Sections ▼  
Add Module... Issues X Risks X Changes X  
Add Section... Settings X

clarity Project Credit Card Processing Enhancement PR1009 On Track

Properties Tasks Staff Assignments Conversations Risks Issues Changes Documents Status Links

PROJECT SUMMARY

Project Name \* Credit Card Processing Enhancement Project ID \* PR1009

Project Type Major Project Work Status Active Start \* May 1, 2021 Finish \* May 28, 2021

Objective  
Create an additional level of protection for card issuers by ensuring that the organization meets minimum levels of security when cardholder data is stored, processed and transmitted.

STAKEHOLDERS

Manager Berks, Paul Sponsor \* Roberts, Beth

Project Management Office \* Olney, Pam Finance and Governance \* Granger, Paula

SETTINGS

clarity Project CRM Enhancements PR1029 On Track

Properties Tasks Staff Assignments Conversations Documents Status Links

PROJECT SUMMARY

Project Name \* CRM Enhancements Project ID \* PR1029

Project Type Application Change Work Status Complete Start \* Jan 29, 2021 Finish \* Jun 8, 2021

Objective  
Develop a repository for all the leads generated from marketing campaigns.

STAKEHOLDERS

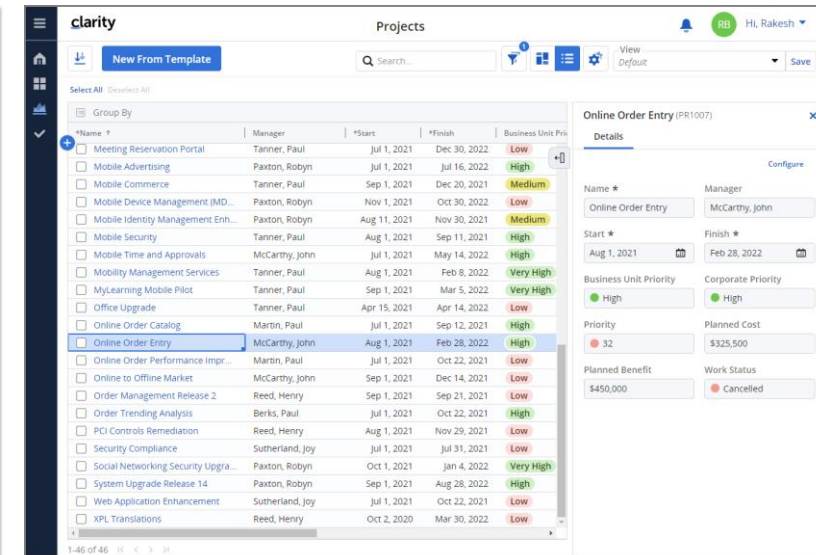
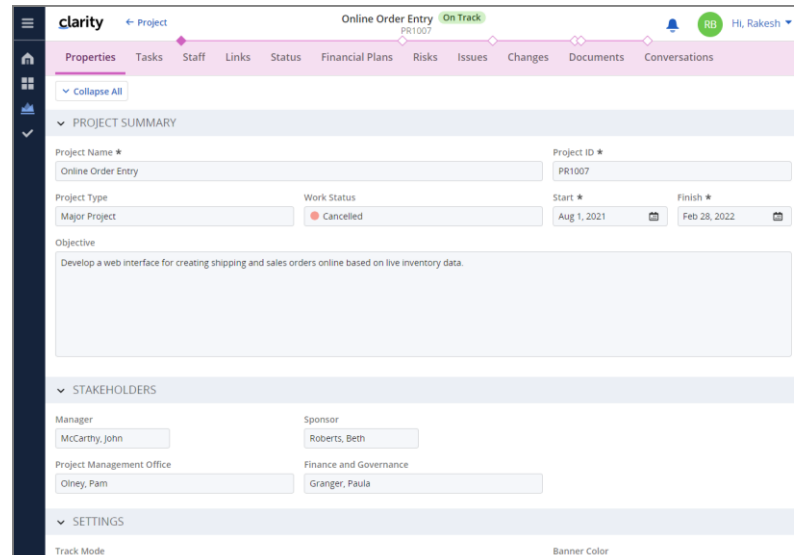
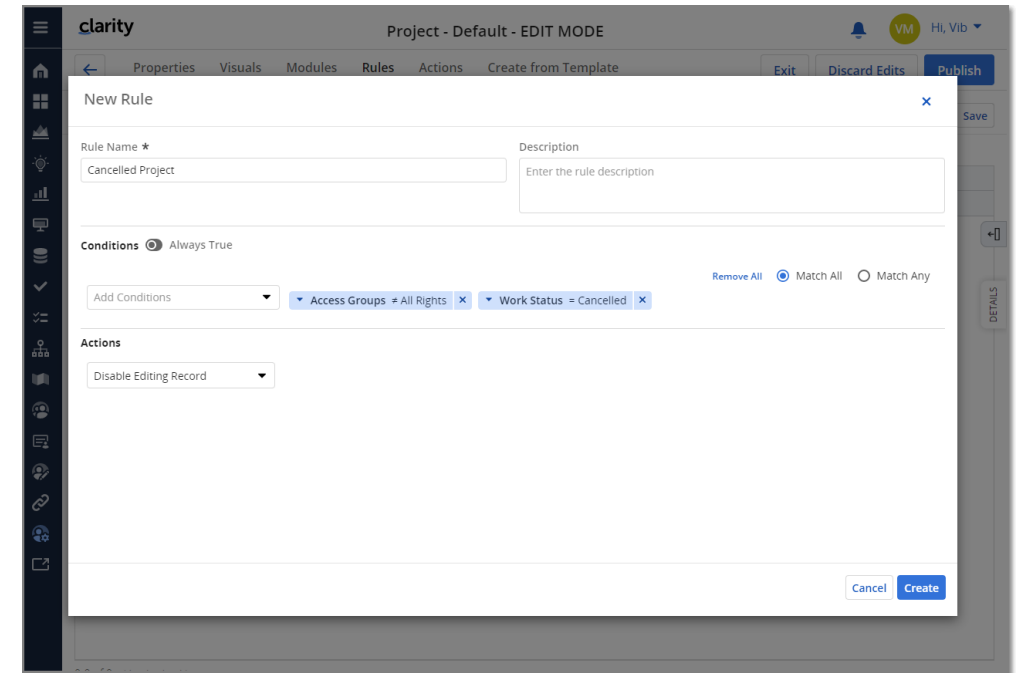
Manager Riviera, Alex Sponsor \* Roberts, Beth

Project Management Office \* Olney, Pam Finance and Governance \* Granger, Paula

**RIC  
modules  
and Settings  
section are  
hidden.**

# 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



# 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.

The image illustrates the process of enforcing required attributes in the Clarity project management system. It consists of three main components:

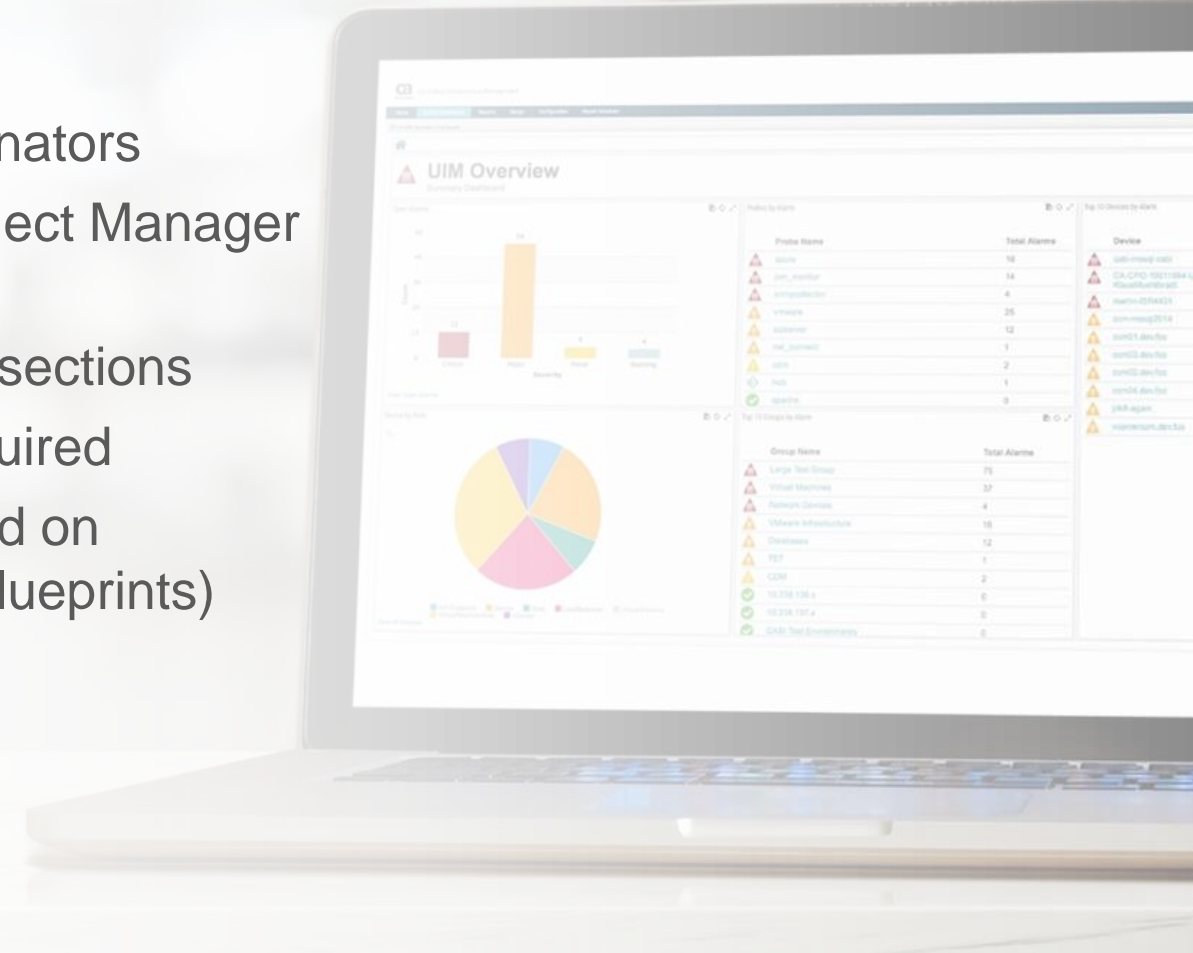
- Edit Rule Dialog:** This dialog is used to configure rules. The 'Rule Name' is 'Always Required'. The 'Conditions' are set to 'Always True'. The 'Actions' section shows 'Required Attributes' with a list of attributes: 'Sponsor', 'Finance and Governance', and 'Project Management Office'. A red arrow points from this list to the 'NEW PROJECT' modal.
- Project Details View:** This view shows the details of a project named 'Mobile Commerce (PR1041)'. The 'Sponsor' is 'Roberts, Beth' and the 'Finance and Governance' is 'Granger, Paula'. A red box highlights a warning message: 'API-1037 : Attributes [financeAndGovernance] are required and must be non-empty.'
- NEW PROJECT Modal:** This modal is used to create a new project. It shows fields for 'Name', 'ID', 'Start', 'Finish', 'Manager', 'Sponsor', and 'Finance and Governance'. A red box highlights the 'Finance and Governance' field, which is required and must be non-empty.



# 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)





# Questions?

