

Activation rules and conditions in Compliance and Security

help.fracttal.com/hc/en-us/articles/41979473319821-Activation-rules-and-conditions-in-Compliance-and-Security

Within the Compliance and Security functionality, activation rules allow you to define specific conditions to control when a form should be displayed during the execution of a task or Work Order (WO).

The screenshot shows the 'Work Management Compliance and Security' interface. At the top, there is a navigation bar with a search bar, a notification bell, a rocket icon, an 'AI' button, and a user profile 'JC'. Below this, the 'Rules' tab is highlighted with a red box. The main content area displays a table with one rule defined:

<input type="checkbox"/>	Description	Security and validation forms
<input checked="" type="checkbox"/>	High Cost Work Order	HIGH COST WORK ORDER

At the bottom left, it says 'Showing 1 of 1' and at the bottom right, there is a blue circular button with a white plus sign (+).

This mechanism ensures that compliance and security validations are requested only when truly necessary, preventing overloading the technician with irrelevant information and maintaining an efficient execution flow.

Rule Definition

Click on the **Activation Rules** tab.

Click on the **(+)** icon to add a rule.

Forms Rules

<input type="checkbox"/>	Description	Security and validation forms
<input type="checkbox"/>	High Cost Work Order	HIGH COST WORK ORDER

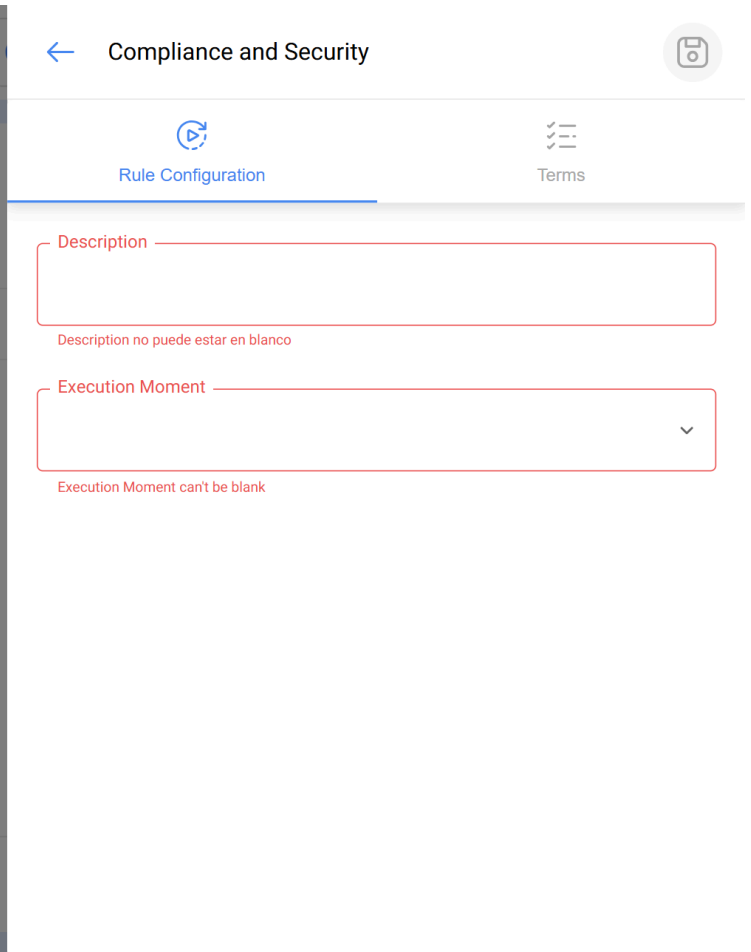
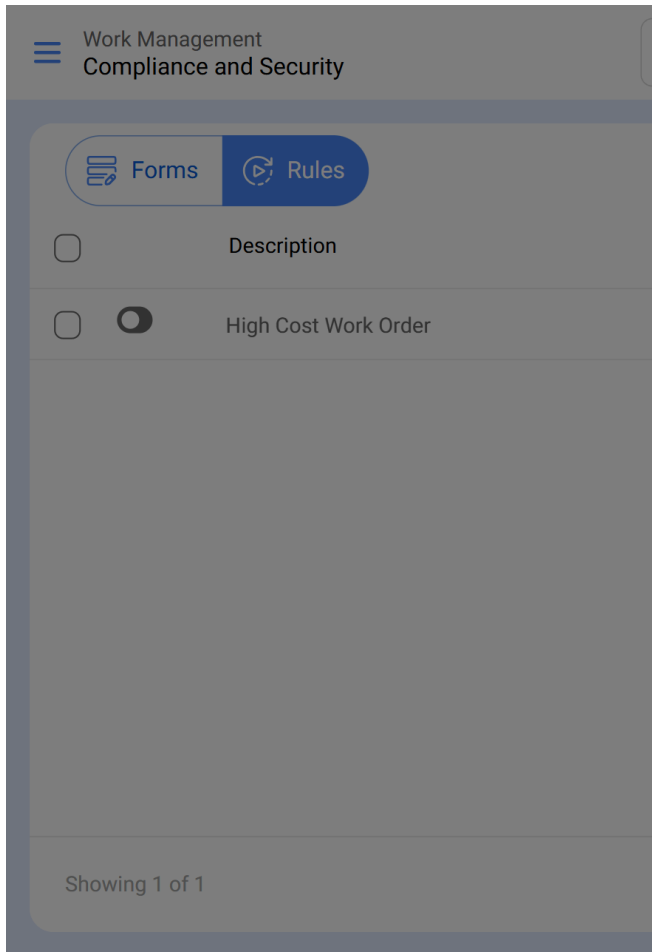
Showing 1 of 1

Fill in the following fields:

a) Rule Description

Choose a clear and descriptive name that indicates its purpose. For example:

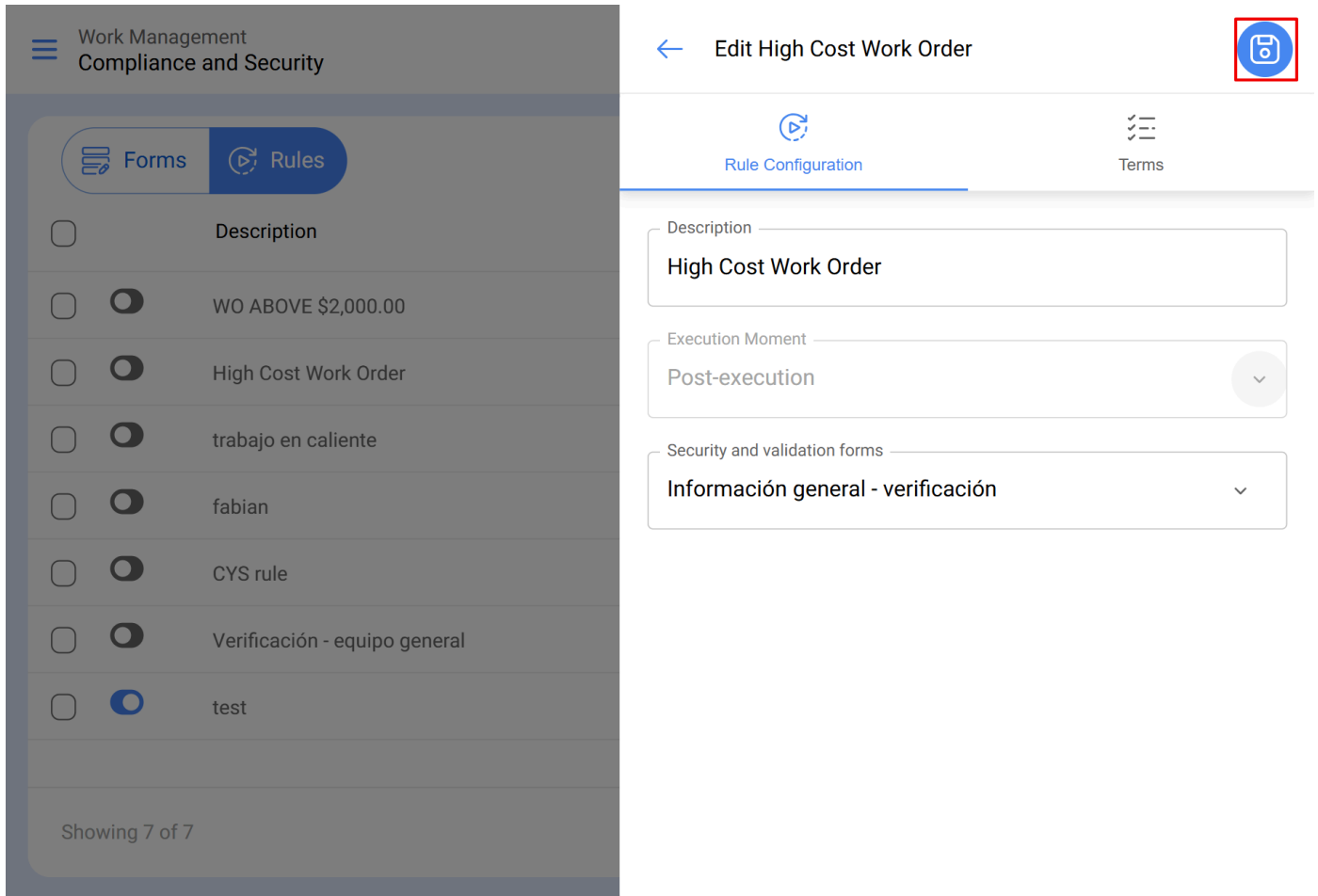
- “Mandatory prior inspection”
- “Post-operational checklist”
- “Final quality validation”



b) Execution Timing

Select when the form should be activated:

- **Pre-execution** (before starting the task)
- **Post-execution** (after completing the task)



Save the Rule

After saving, your form will be available to continue creating fields and validation settings in the next steps.

Conditions

Conditions determine *when* the rule will be applied during the execution of the form. That is, they allow you to activate validations only when certain operational criteria are met.

1. Select the type of evaluation

Before adding conditions, define how they should be evaluated:

At least one is true

The rule will be activated if **any** of the configured conditions are met.

Work Management
Compliance and Security

Forms Rules

Description

test

High Cost Work Order

Showing 2 of 2

Compliance and Security

Rule Configuration Terms

When the event meets these conditions :

At least one is true All be true

You must add at least one condition to complete the execution

No data to show with these parameters

Action Done

All must be true

The rule will only be activated when **all** the configured conditions are met simultaneously.

Work Management
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Forms Rules

- Description
- test
- High Cost Work Order

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Rule Configuration Terms

When the event meets these conditions :

At least one is true All be true

! You must add at least one condition to complete the execution

No data to show with these parameters

Showing 0 of 0

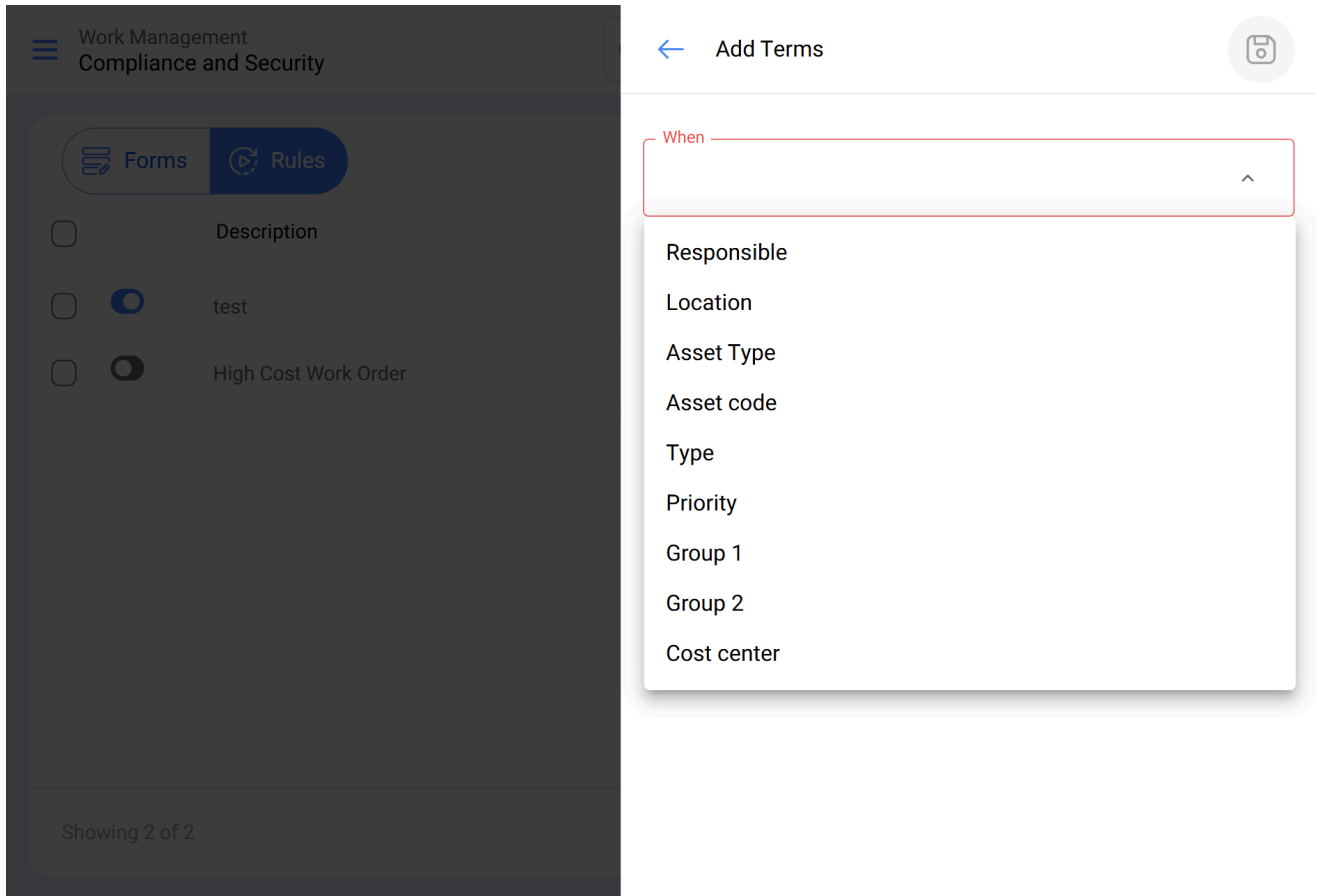
2. Add Operational Conditions

To add a condition: Click on the (+) icon *Add condition*.

The screenshot displays the 'Compliance and Security' rule configuration interface. On the left, a sidebar lists available fields: 'Description', 'test', and 'High Cost Work Order'. The main area shows the 'Rule Configuration' tab with a 'Terms' sub-tab. A message states 'When the event meets these conditions :' with options for 'At least one is true' and 'All be true'. A red warning box says 'You must add at least one condition to complete the execution'. A blue folder icon with a plus sign is highlighted, indicating the 'Add condition' button.

A list of available fields will appear to filter the rule's behavior.

3.



Available segments are:

- Responsible (assigned technician)
- Location
- Asset type
- Asset code
- Type (task or activity)
- Priority
- Classification 1
- Classification 2
- Cost center

3. Select values based on context

By choosing one of these segments, a contextual menu with options related to your operation will open. These lists may vary depending on:

- The cadastral structure of your organization
- The types of assets created
- The configured cost centers
- The classification of tasks
- The responsible team
- Your company's custom taxonomy

This allows you to adapt the conditions in a fully customized way, ensuring the rule applies only to the desired scenarios.

Activation Conditions

Regardless of the parameter, you will always find a key field:

Operation


- Defines the logic that will be evaluated. Examples of operations:
- "is equal to"
- "is not equal to"

Work Management
Compliance and Security

Forms Rules

- Description
- test
- High Cost Work Order

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← Add Terms 

When

Operation

- Is equal to
- Is equal to
- It is not equal to

Responsible

This operation indicates the comparison the system will perform to activate (or not) the form.