

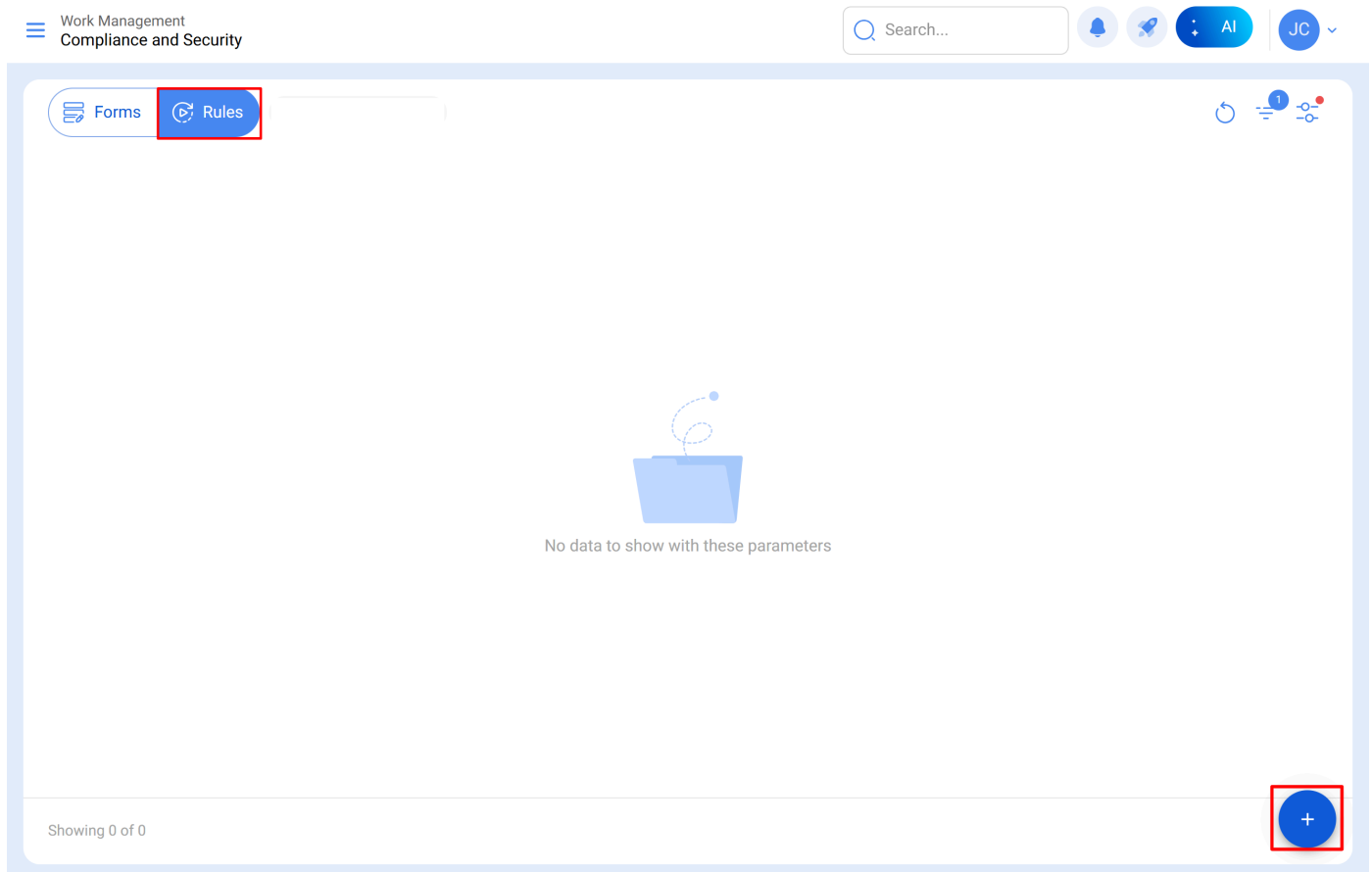
Compliance and Security – Configuration of Activation Rules – Help Center

 help.fractal.com/hc/en-us/articles/41815682208269-Compliance-and-Security-Configuration-of-Activation-Rules

Within the Compliance and Security submodule, the **"Rules"** section allows you to define specific terms/conditions to determine when a form should appear during task execution. This way, the system requests validations only when necessary, ensuring compliance with internal security and quality procedures.

Creating rules

- Access the **rules** tab within the corresponding form.
- Click the **(+)** icon to add a new rule.



Complete the following fields:

Rule description

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

- "Mandatory pre-inspection"
- "Post-operational checklist"
- "Final quality validation"

Work Management
Compliance and Security

Forms Rules Description: compliance X

No data to show with these parameters

Showing 0 of 0

Compliance and Security

Rule Configuration Terms

Description

Description no puede estar en blanco

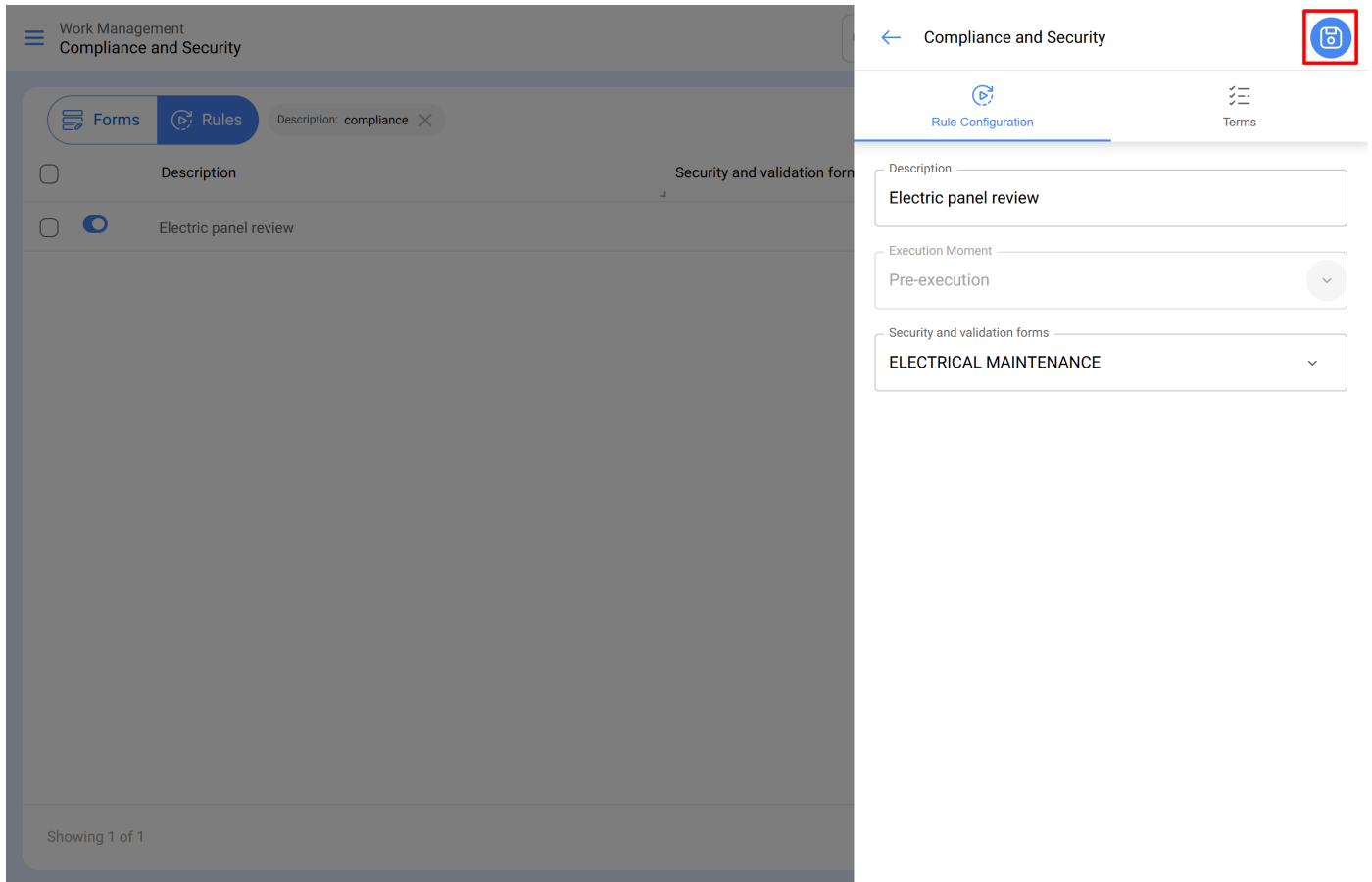
Execution Moment

Execution Moment can't be blank

Execution moment

Select when the form should be triggered:

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



After saving the rule, it is essential to define the terms that will determine when the rule will be applied.

Activation terms

Terms determine when a rule will be applied during form execution. In other words, they allow validations to be triggered only when certain operational criteria, related to the task's context, are met.

1. Select the term type

Before adding terms, define how they should be evaluated:

At least one is true

The rule will be triggered if **any** of the configured terms is met.

The screenshot displays the 'Compliance and Security' interface. On the left, a sidebar shows 'Forms' and 'Rules' tabs, with 'Rules' selected. Below the tabs, a table lists rules with columns for 'Description' and 'Security and validation form'. One rule is visible: 'Electric panel review'. The main area on the right is titled 'Rule Configuration' and 'Terms'. It shows a configuration for a rule with the condition 'When the event meets these conditions :'. Two radio buttons are present: 'At least one is true' (selected and highlighted with a red box) and 'All be true'. A message box below the radio buttons states: 'You must add at least one condition to complete the execution'. At the bottom, there is a blue folder icon with a plus sign and the text 'No data to show with these parameters'. The bottom status bar shows 'Showing 0 of 0'.

All must be true

The rule will only be triggered when **all** the configured terms are met simultaneously.

Work Management
Compliance and Security

Forms

Rules

Description: compliance

Description

Security and validation form

Electric panel review

ELECTRICAL MAINTENANCE

Showing 1 of 1

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

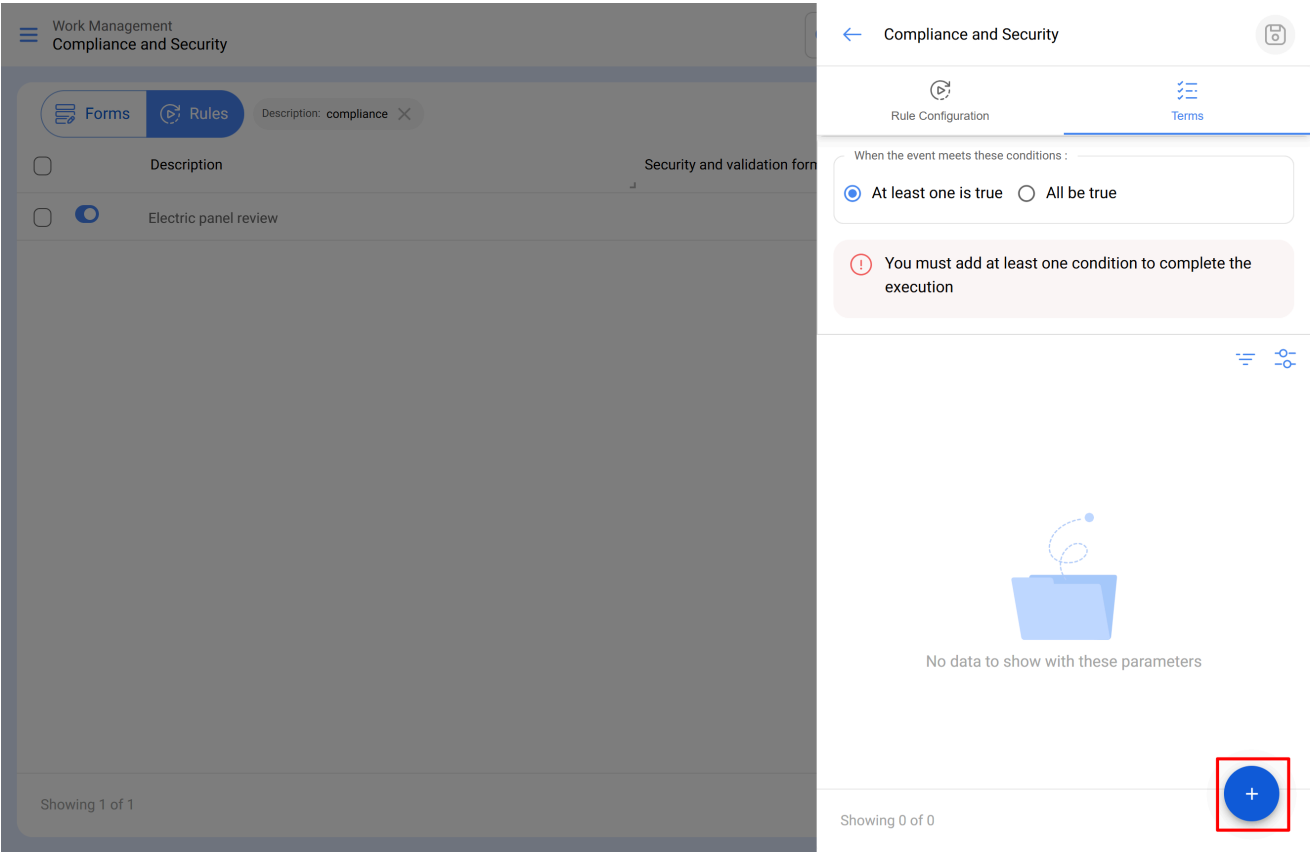
No data to show with these parameters

Showing 0 of 0

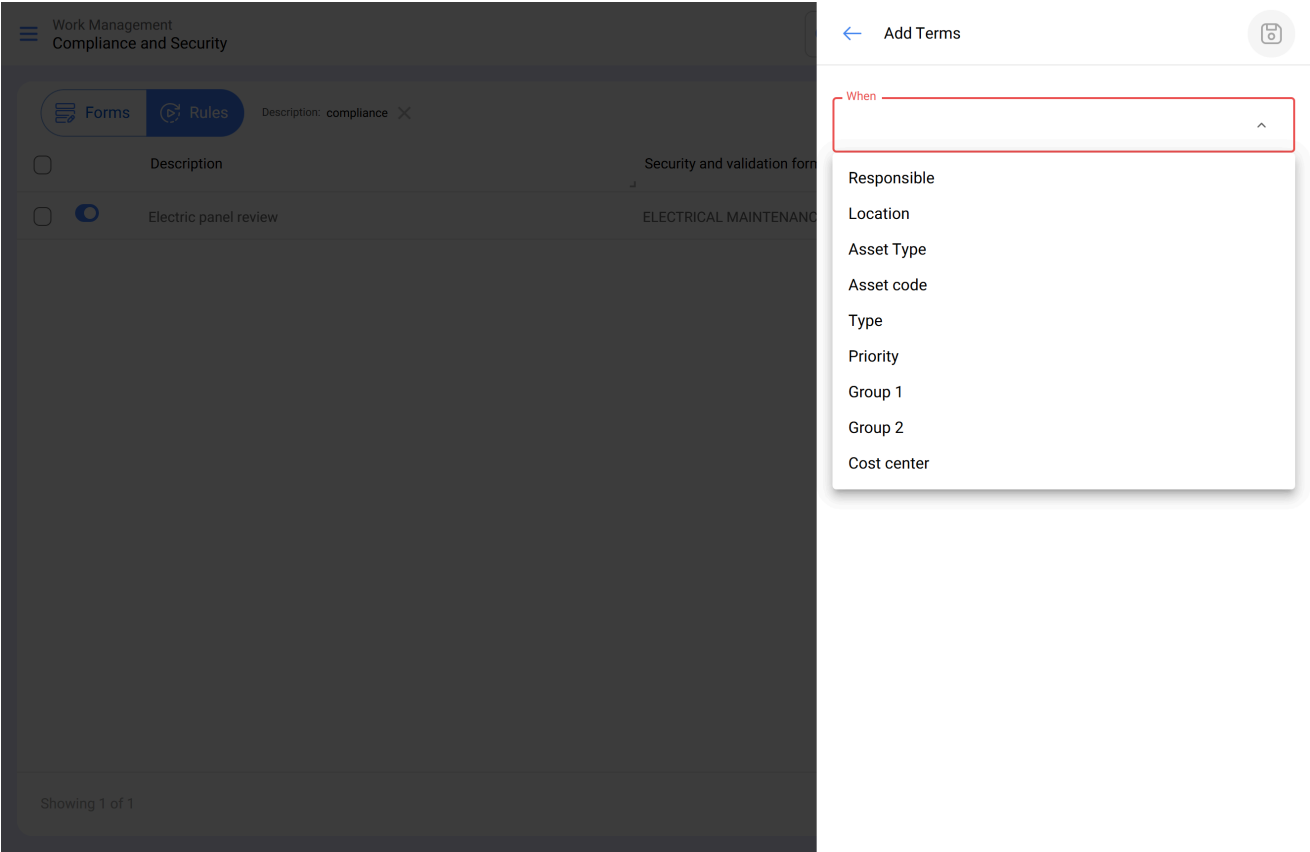
2. Add operational terms

To add a term:

1. Click the (+) icon **Add terms**.



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



The available segments are:

- **Responsible** (assigned technician)
- **Location**
- **Asset type**
- **Asset code**
- **Type** (of 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 appear.

These lists may vary depending on:

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

This allows the terms to be fully customized, ensuring that the rule is applied only in the desired scenarios.

How fields work within a terms

When configuring a term, each available parameter includes a field called **Operation**, which determines the comparison logic used by the system to validate if the term is met.

The operation defines how the selected value will be evaluated against the existing data in the Work Order, with options such as:

- **Equal to**
- **Not equal to**

The screenshot displays the 'Add Terms' configuration window. The 'When' dropdown is set to 'Responsible'. The 'Operation' dropdown is open, showing three options: 'Is equal to' (highlighted), 'Is equal to', and 'It is not equal to'. Below the operation dropdown is a 'Responsible' dropdown. The background shows a list of rules with a description 'Electric panel review'.

Based on this definition, the system will determine whether the rule should be applied during form execution.

Dependent parameters

When selecting certain parameters, additional options may be enabled to refine the term. For example, when choosing **Responsible**, fields related to the type of responsible person or selecting a specific user may be displayed.

- Type of responsible (Human Resource or Third Party)
- Selection of the responsible person

For example, you could configure a term like:

Work Management
Compliance and Security

Forms

Rules

Description: compliance

Description

Security and validation form

Electric panel review

ELECTRICAL MAINTENANCE

Showing 1 of 1

Add Terms

When

Responsible

Operation

Is equal to

Type of employee

Inhouse Personnel

Responsible

Jonas Campos

When responsible is equal to 'Jonas Campos', then trigger the form.

In this case, the form will only be triggered when that specific technician is assigned in the WO.

This configuration allows for more detailed filtering, adapting to the operational structure of the organization and ensuring that the rule is only activated in the defined scenarios.