

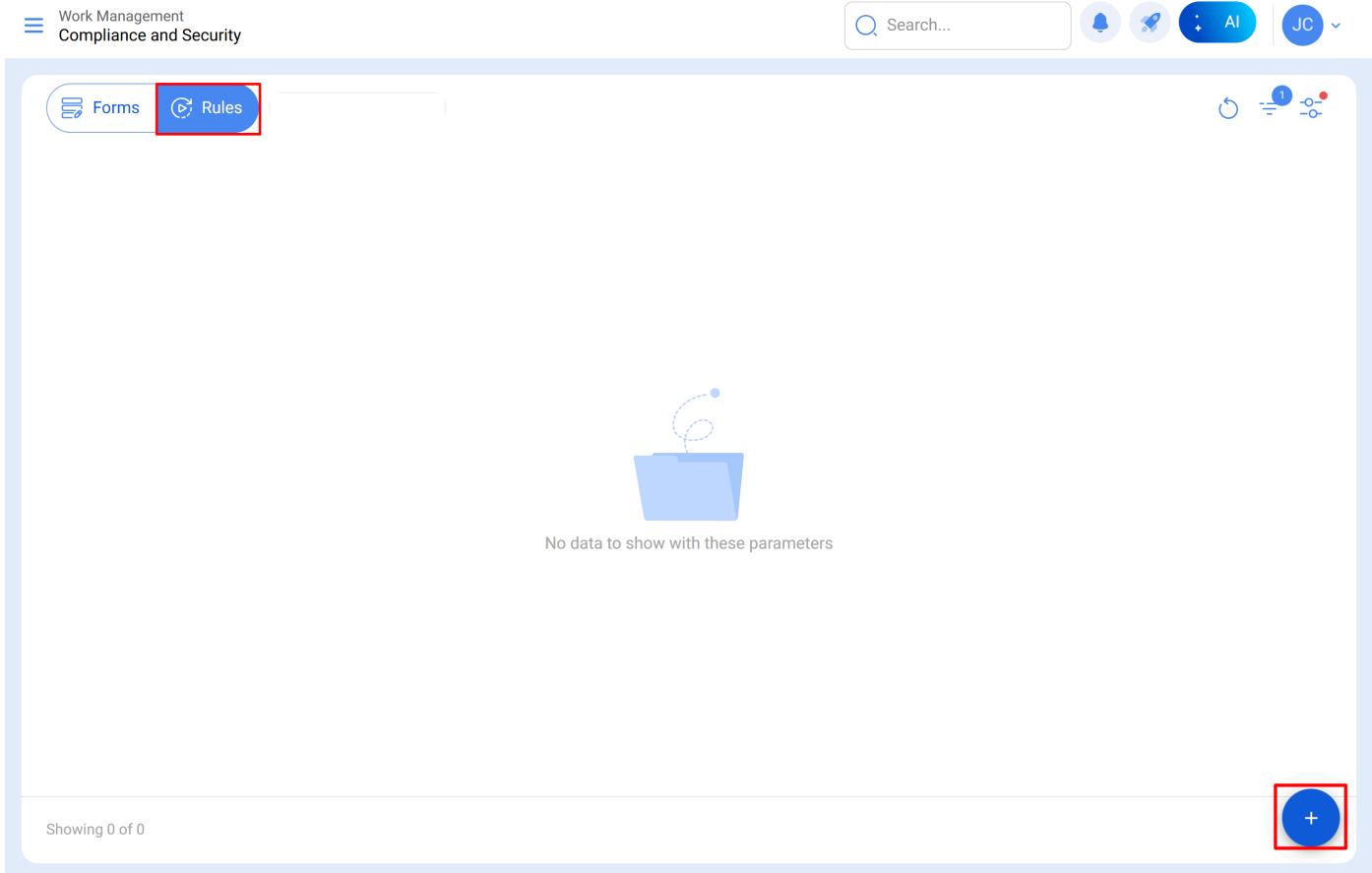
Compliance and Security – Configuration of Activation Rules – Help Center

 help.fracttal.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.



Work Management
Compliance and Security

Search... AI JC

Forms Rules

No data to show with these parameters

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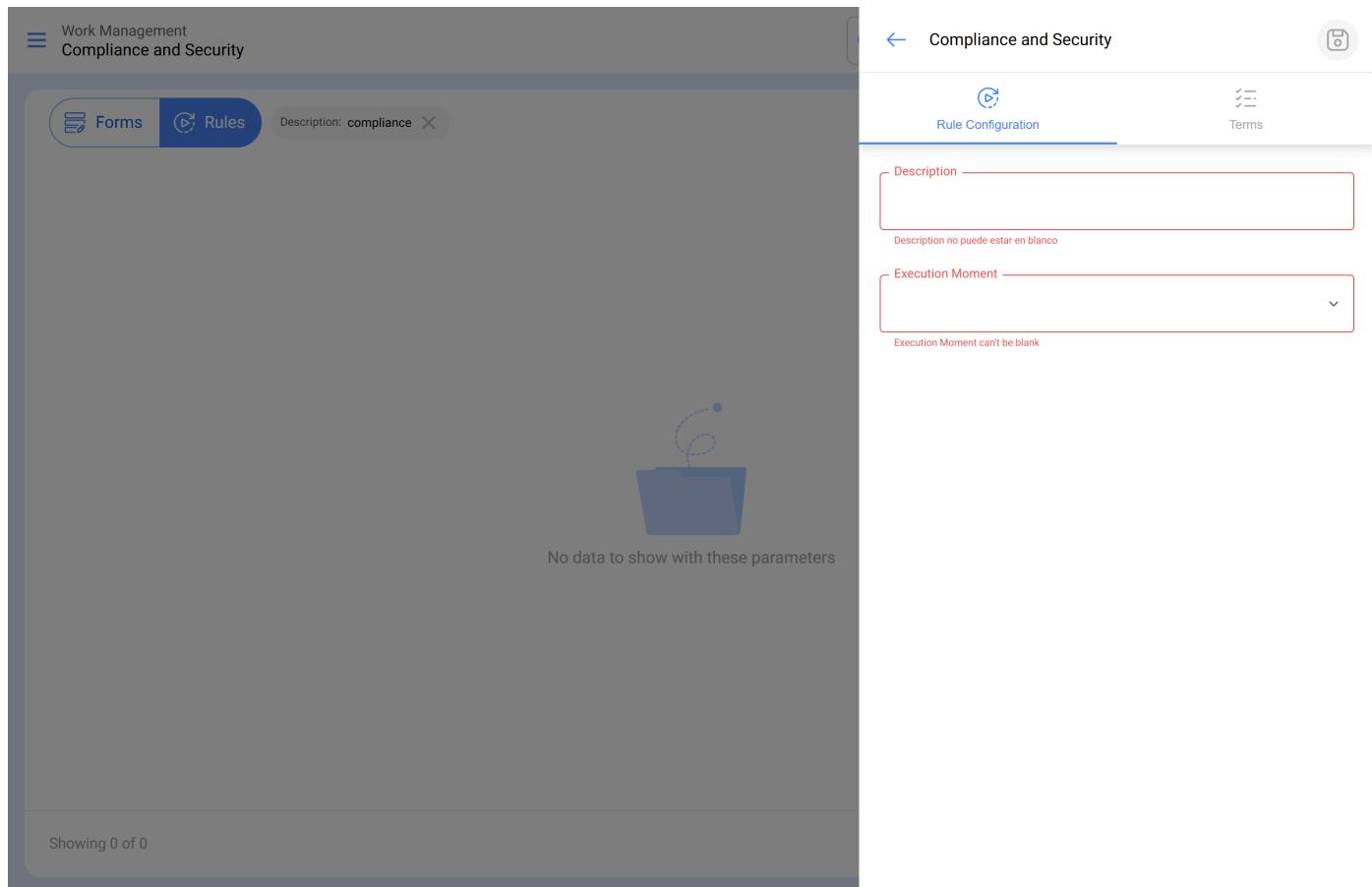
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Complete the following fields:

Rule description

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

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

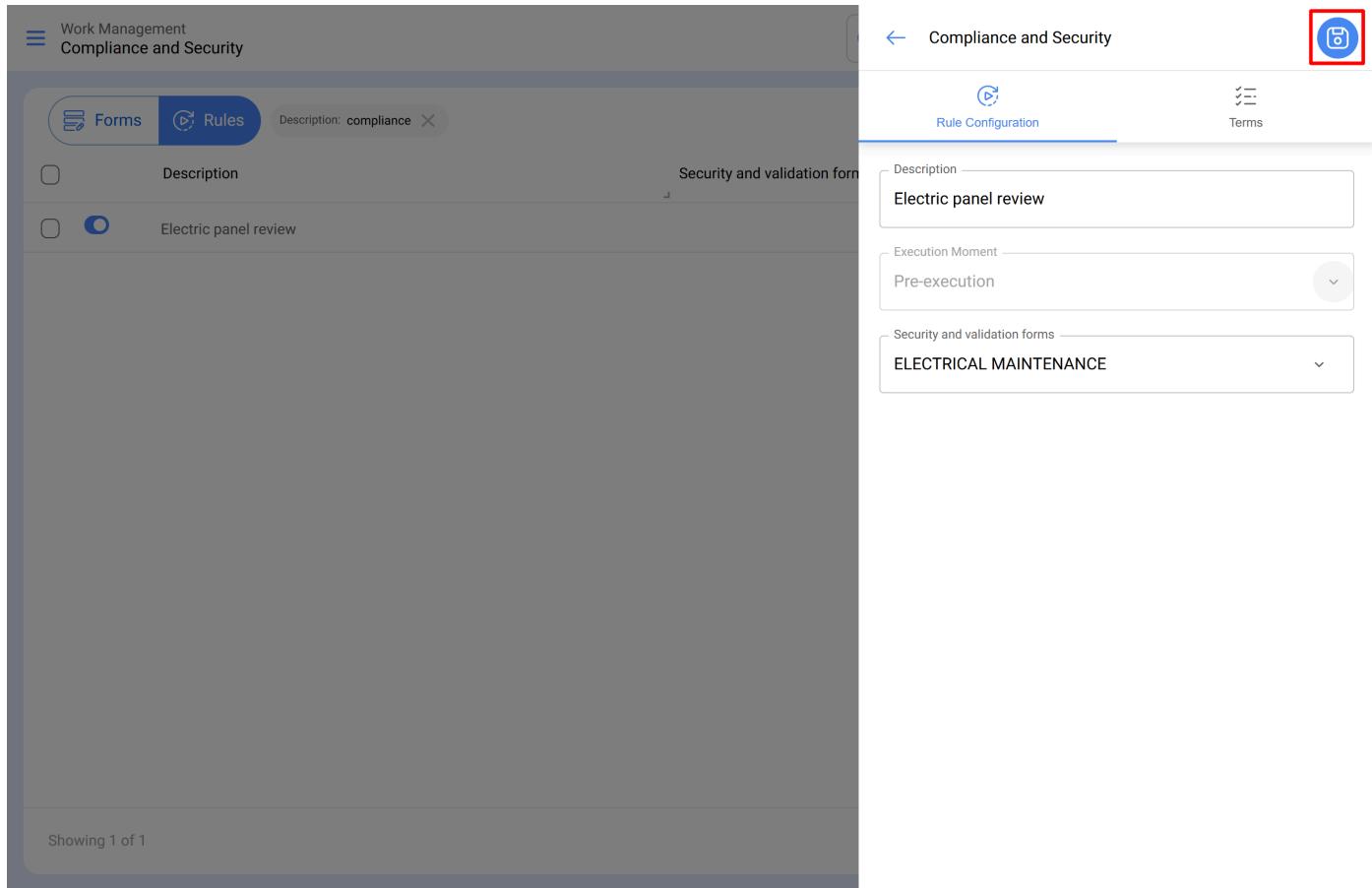


The screenshot shows a software interface for 'Compliance and Security' under 'Work Management'. The 'Rules' tab is selected. A search bar shows 'Description: compliance'. The main area displays a message: 'No data to show with these parameters'. On the right, the 'Rule Configuration' panel is open, showing fields for 'Description' and 'Execution Moment'. Both fields have validation errors: 'Description no puede estar en blanco' and '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)



The screenshot shows the 'Work Management Compliance and Security' interface. On the left, a sidebar lists 'Forms' and 'Rules'. The 'Rules' tab is selected, showing a list of rules with checkboxes. One rule is selected, labeled 'Electric panel review'. A modal dialog titled 'Rule Configuration' is open on the right, containing fields for 'Description' (set to 'Electric panel review'), 'Execution Moment' (set to 'Pre-execution'), and 'Security and validation forms' (set to 'ELECTRICAL MAINTENANCE'). A red box highlights the 'Save' icon in the top right corner of the dialog.

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.

Work Management
Compliance and Security

Forms Rules Description: compliance

Description: Electric panel review

Security and validation form

Showing 1 of 1

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





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: Description

Electric panel review

Security and validation form

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

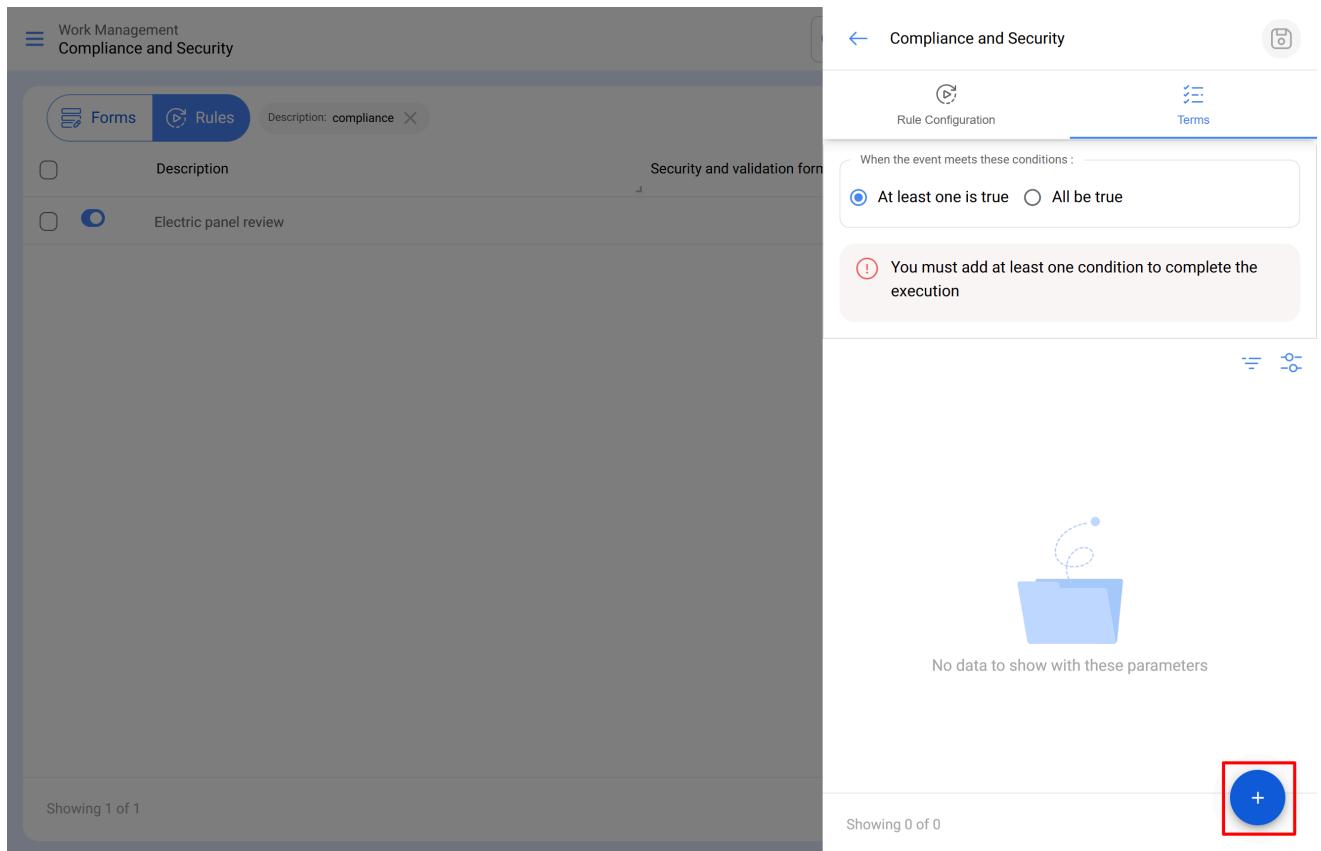
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2. Add operational terms

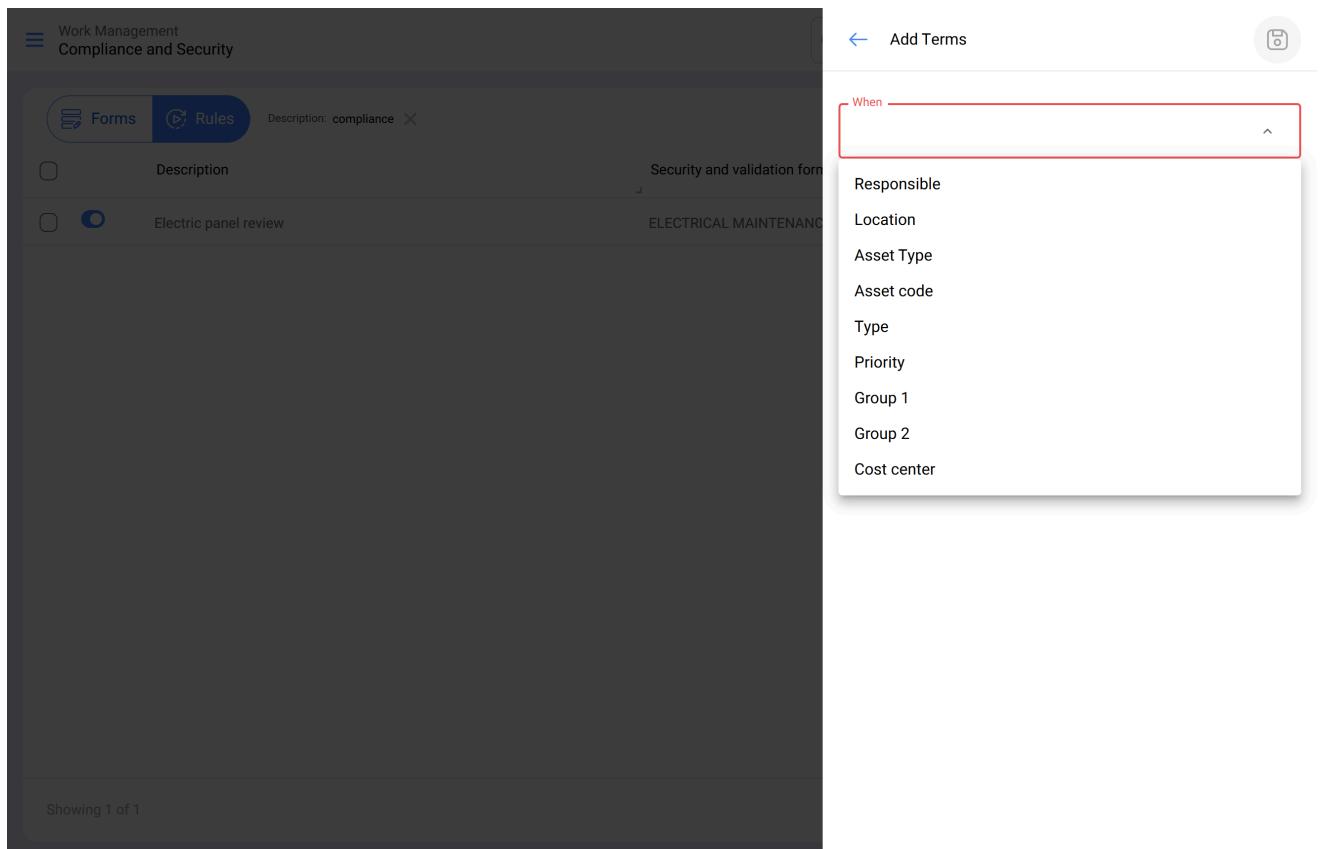
To add a term:

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



The screenshot shows the 'Work Management' interface with 'Compliance and Security' selected. On the left, the 'Rules' tab is active, showing a list of rules: 'Description' (unchecked) and 'Electric panel review' (checked). The right side shows a 'Rule Configuration' modal with a 'Terms' tab selected. A message box says: 'When the event meets these conditions:' with radio buttons for 'At least one is true' (selected) and 'All be true'. A warning message: 'You must add at least one condition to complete the execution' is displayed. A red box highlights the blue '+' icon in the bottom right corner of the modal.

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



The screenshot shows the 'Add Terms' modal from the previous step. The 'When' field is empty and highlighted with a red box. A list of filter fields is shown on the right: Responsible, Location, Asset Type, Asset code, Type, Priority, Group 1, Group 2, and Cost center. A red box highlights the blue '+' icon in the bottom right corner of the modal.

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

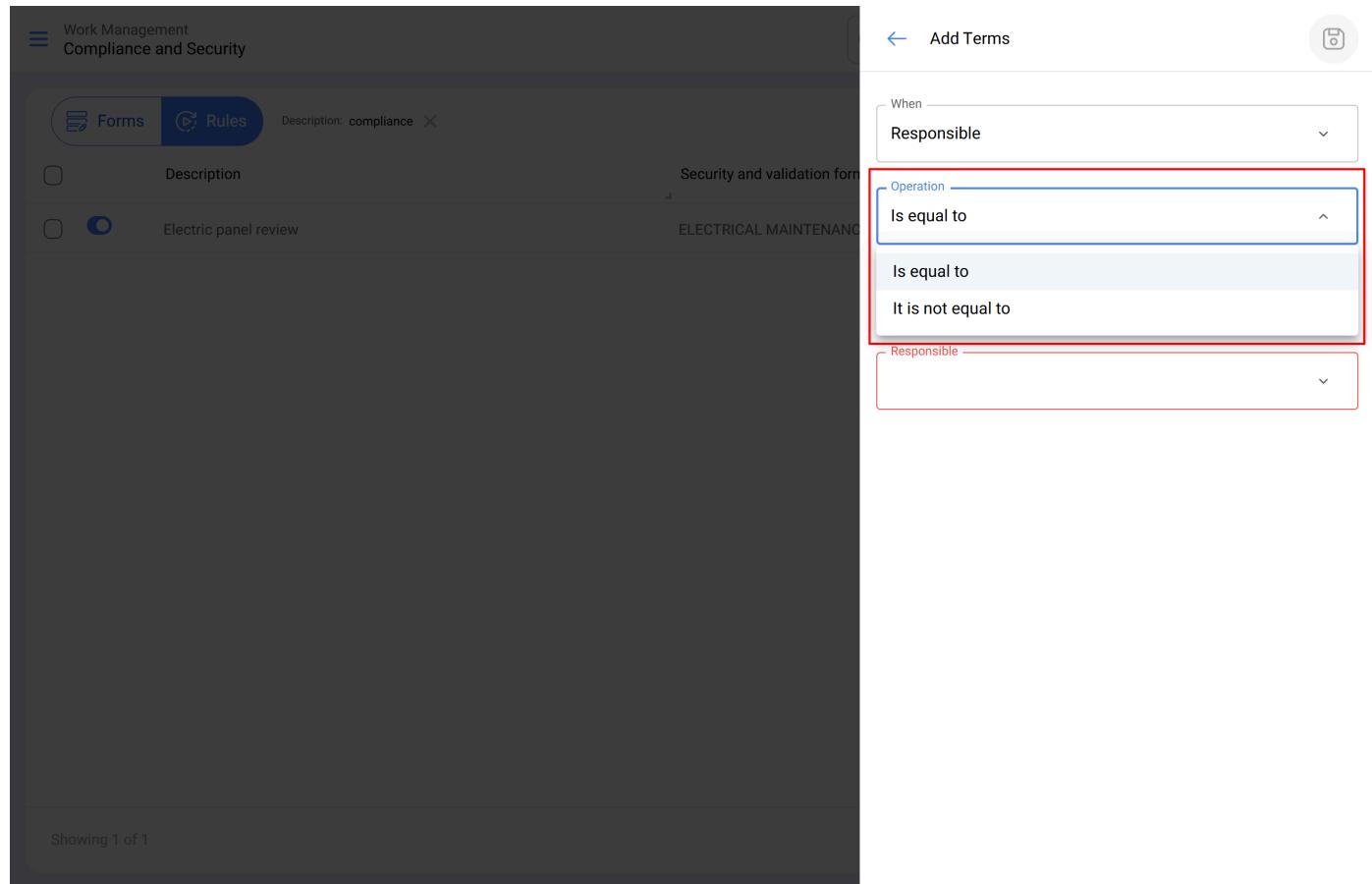
This allows the terms to be fully customized, ensuring that the rule is applied only in the desired scenarios.

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 shows the 'Work Management Compliance and Security' interface with the 'Rules' tab selected. A rule is being configured with the following details:

- When:** Responsible
- Operation:** Is equal to
- Options:** It is not equal to

The 'Is equal to' option is highlighted with a red box. The 'When' and 'Operation' fields are also highlighted with red boxes.

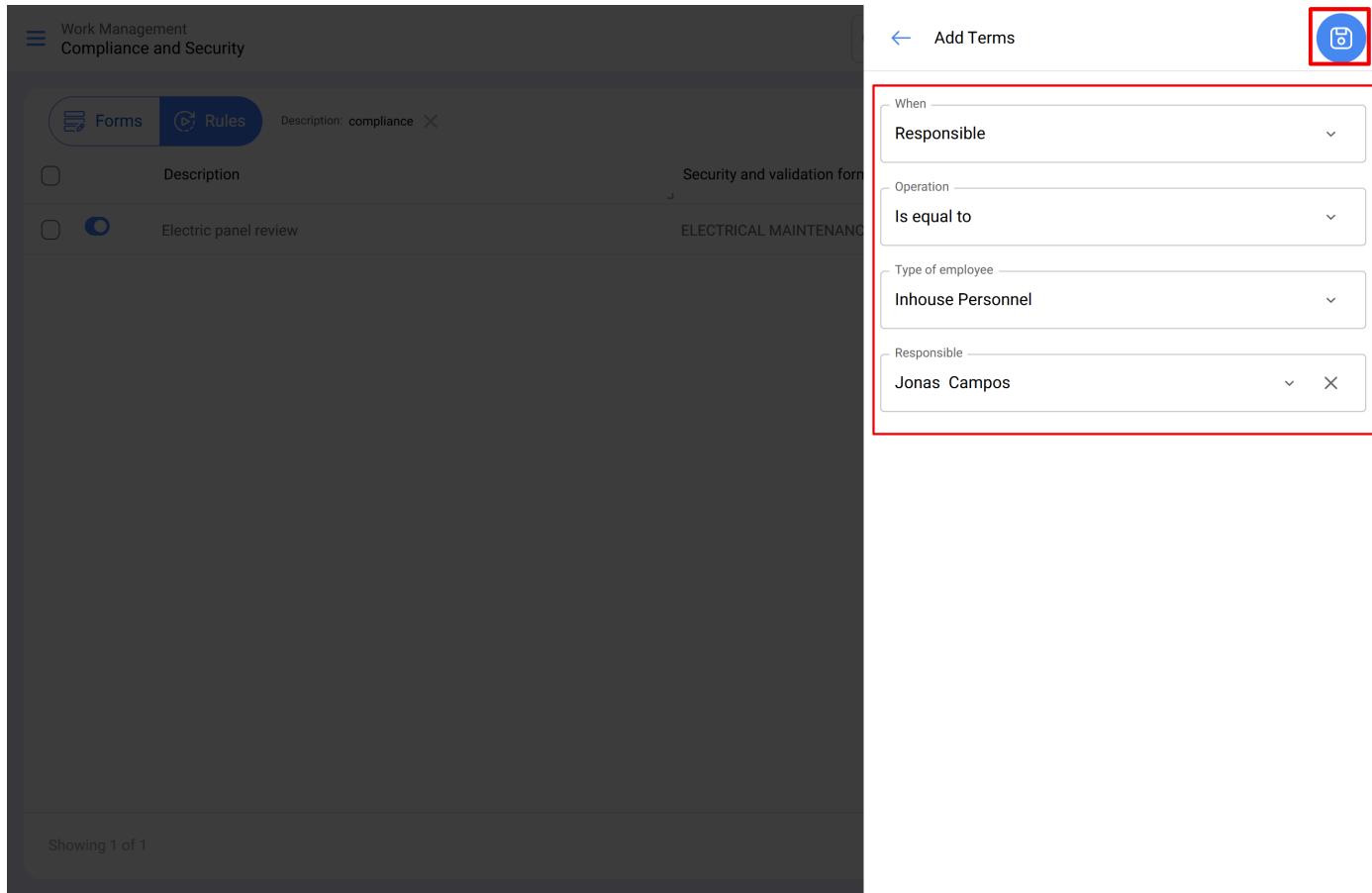
Based on this definition, the system will determine whether the rule should be applied during form execution.

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:



The screenshot shows a software interface for 'Work Management Compliance and Security'. On the left, there are tabs for 'Forms' and 'Rules'. The 'Rules' tab is selected, and the description 'compliance' is visible. The main area shows a list of rules. One rule is selected, and its details are displayed on the right. The rule configuration is as follows:

- When Responsible Is equal to Inhouse Personnel
- Responsible Jonas Campos

A red box highlights the configuration panel on the right.

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.