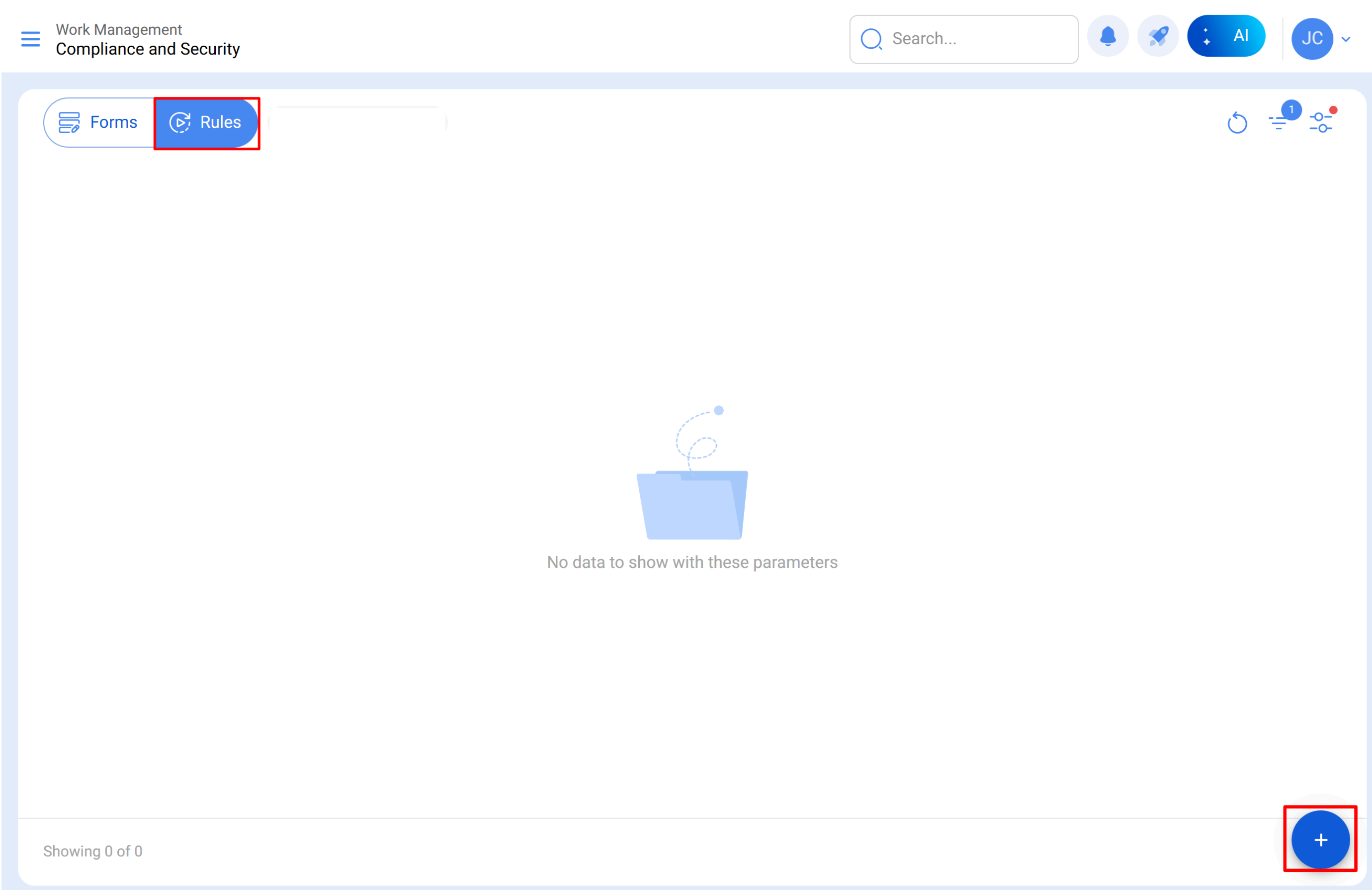
Compliance and Security – Configuration of Activation Rules – Help Center

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.

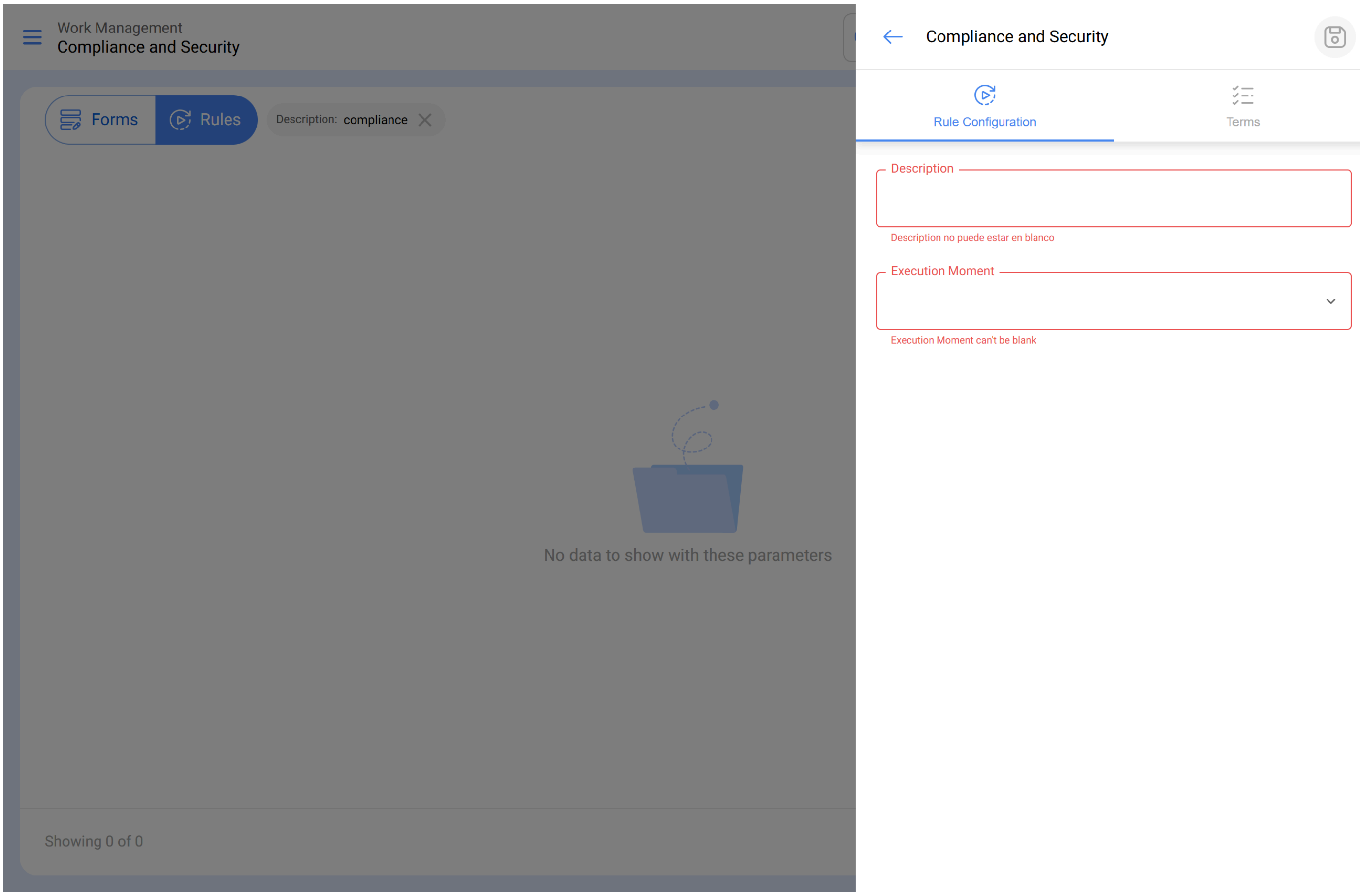


Complete the following fields:

Rule description

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

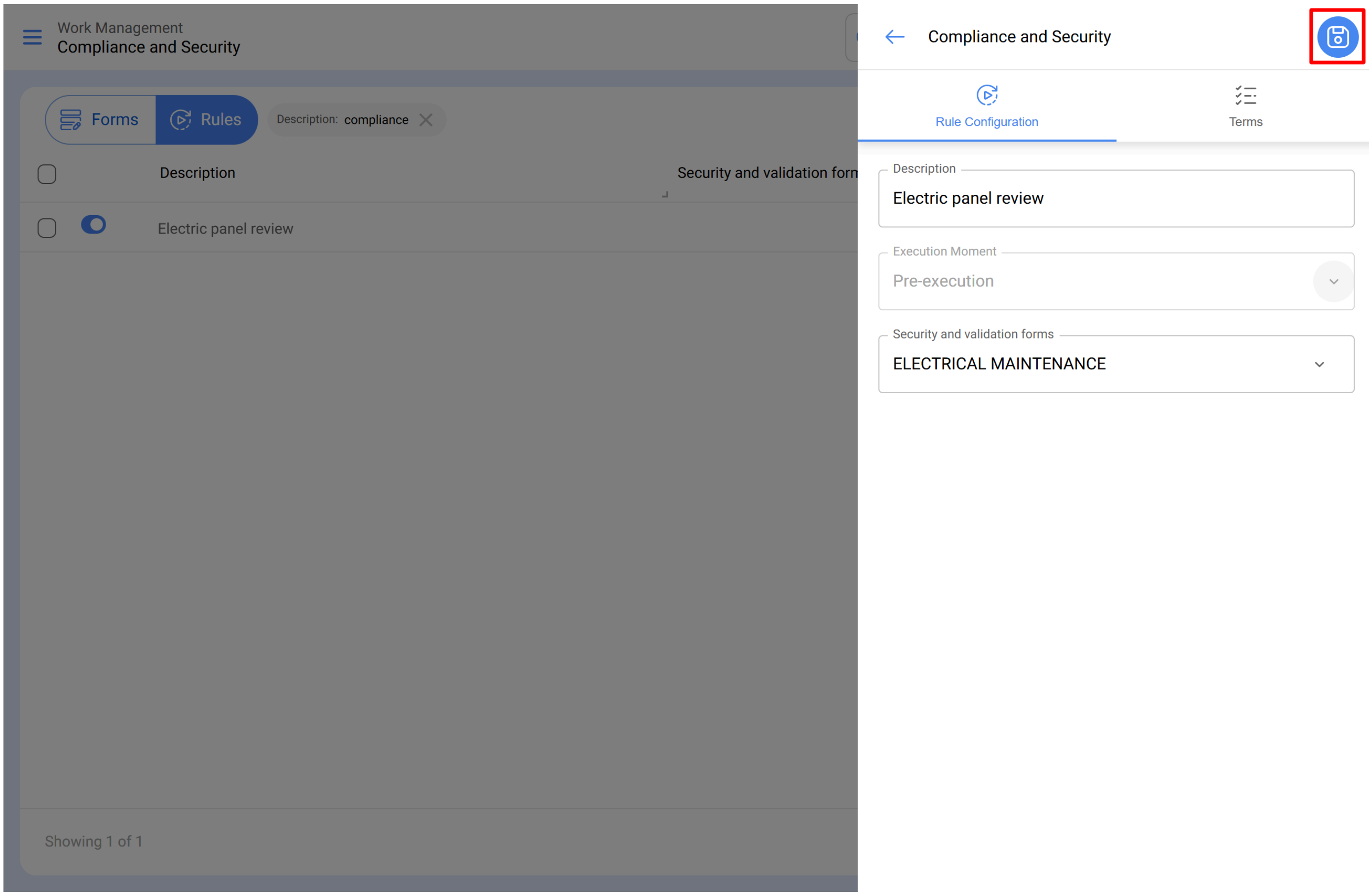
- *"Mandatory pre-inspection"*
- *"Post-operational checklist"*
- *"Final quality validation"*



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.

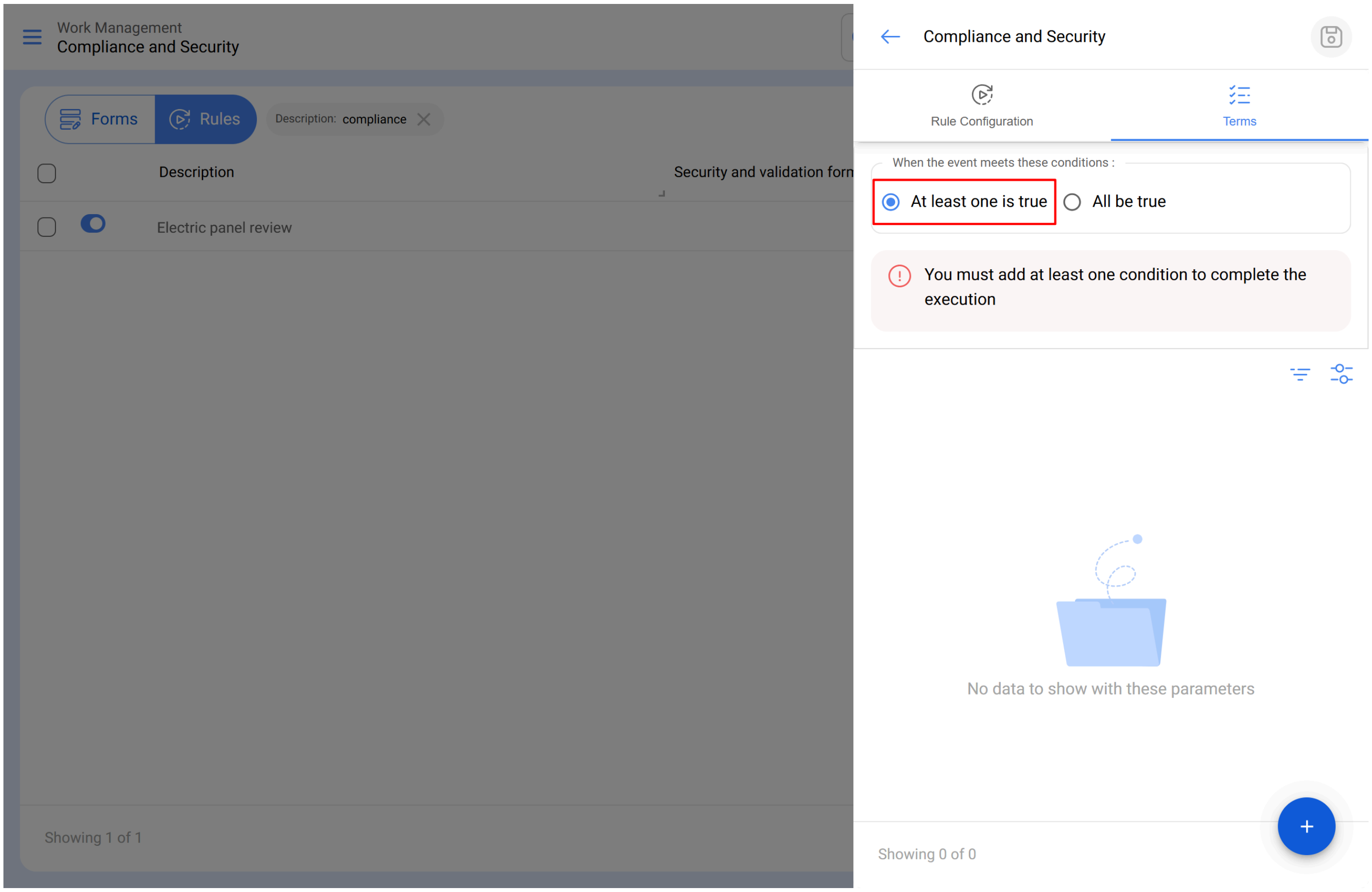
Activation terms

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**

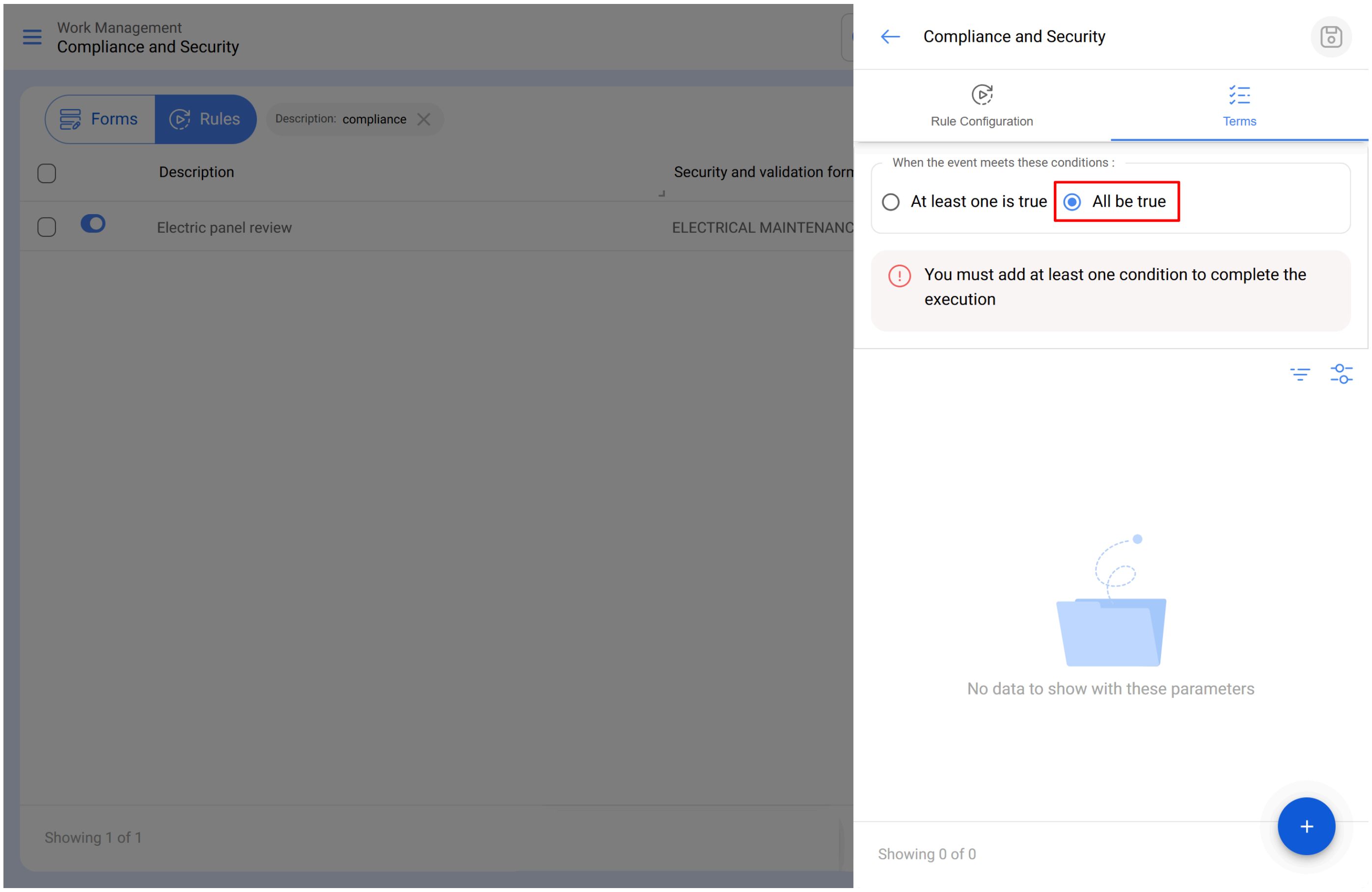
Before adding terms, define how they should be evaluated:

At least one is true
The rule will be triggered if **any** of the configured terms is met.



All must be true

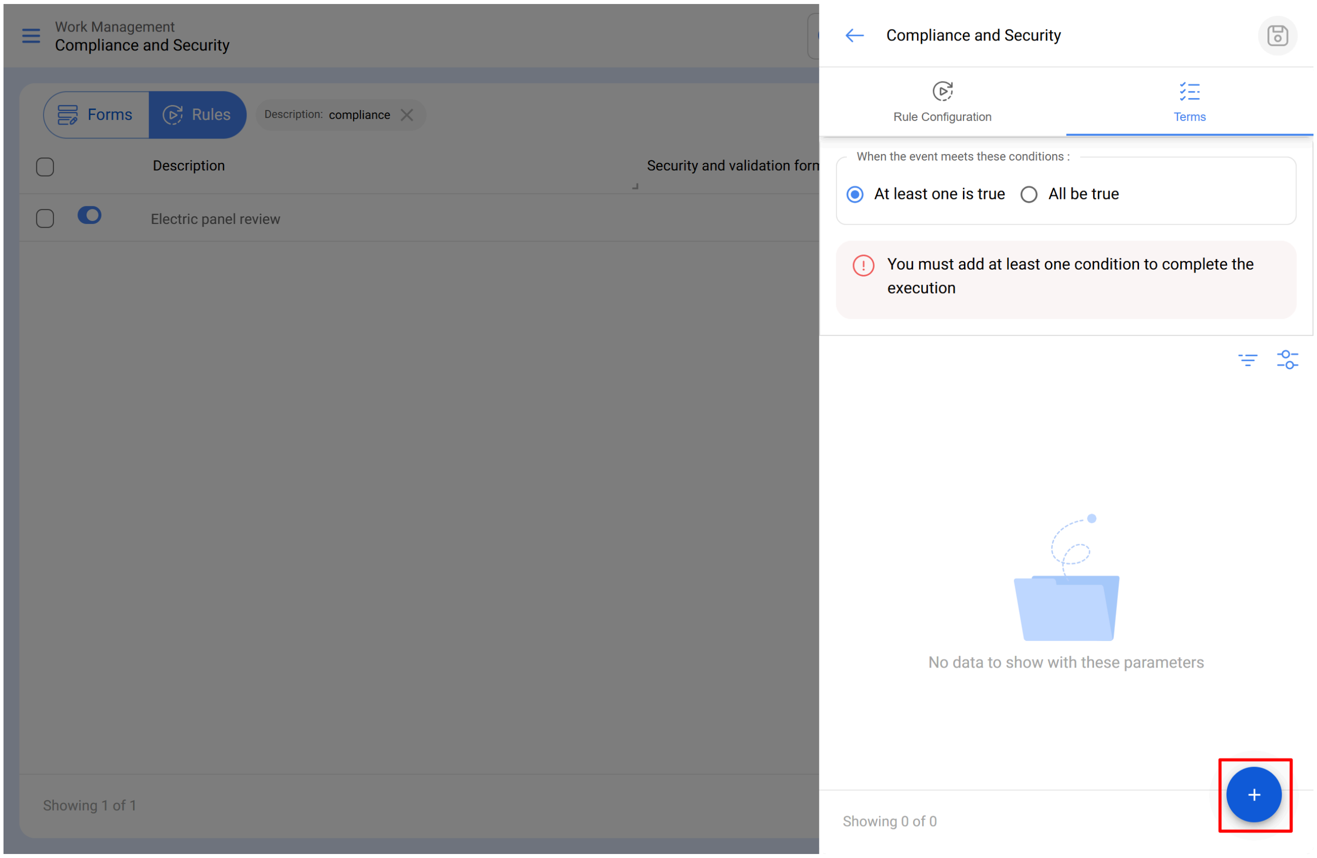
The rule will only be triggered when **all** the configured terms are met simultaneously.



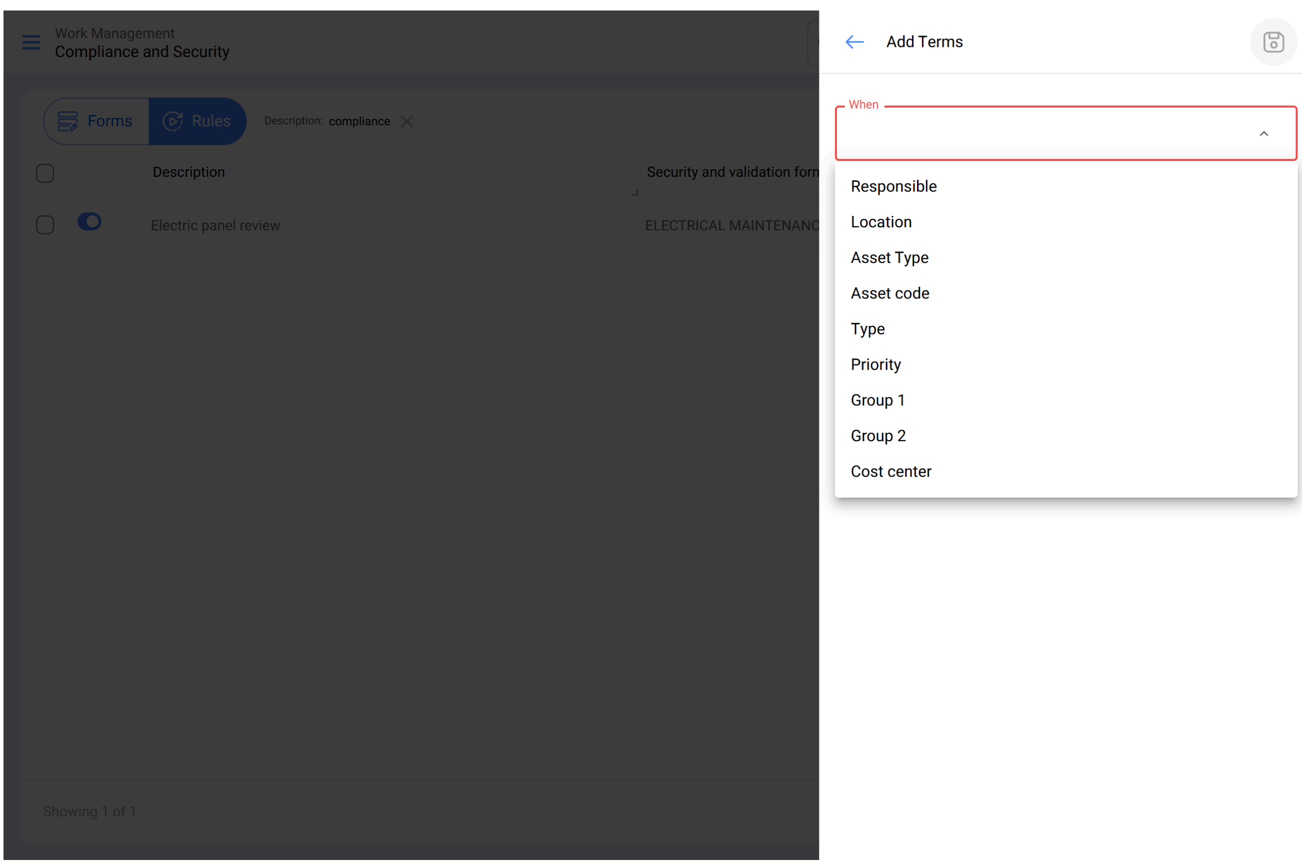
2. Add operational terms

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

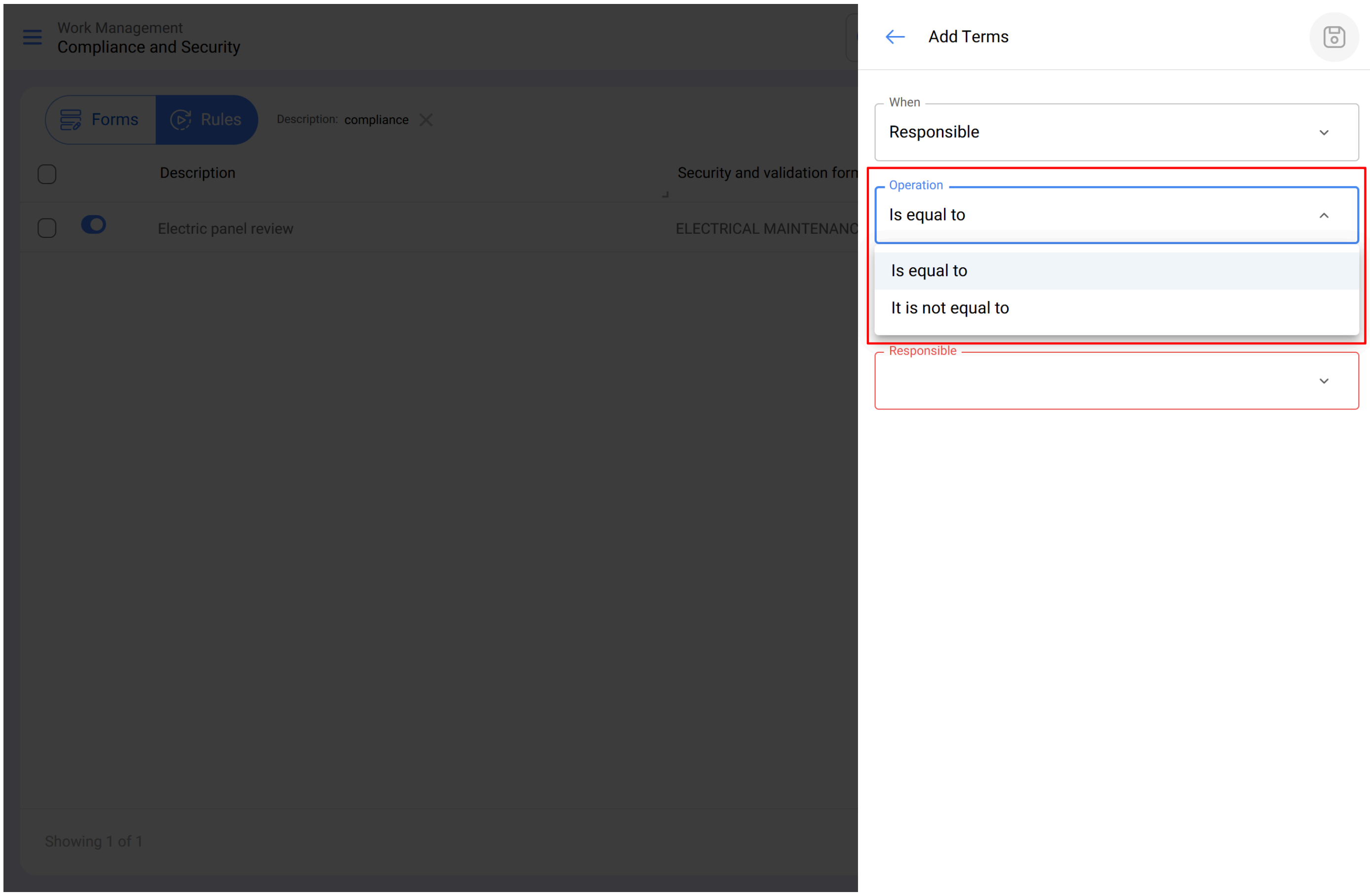
This allows the terms to be fully customized, ensuring that the rule is applied only in the desired scenarios.

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**



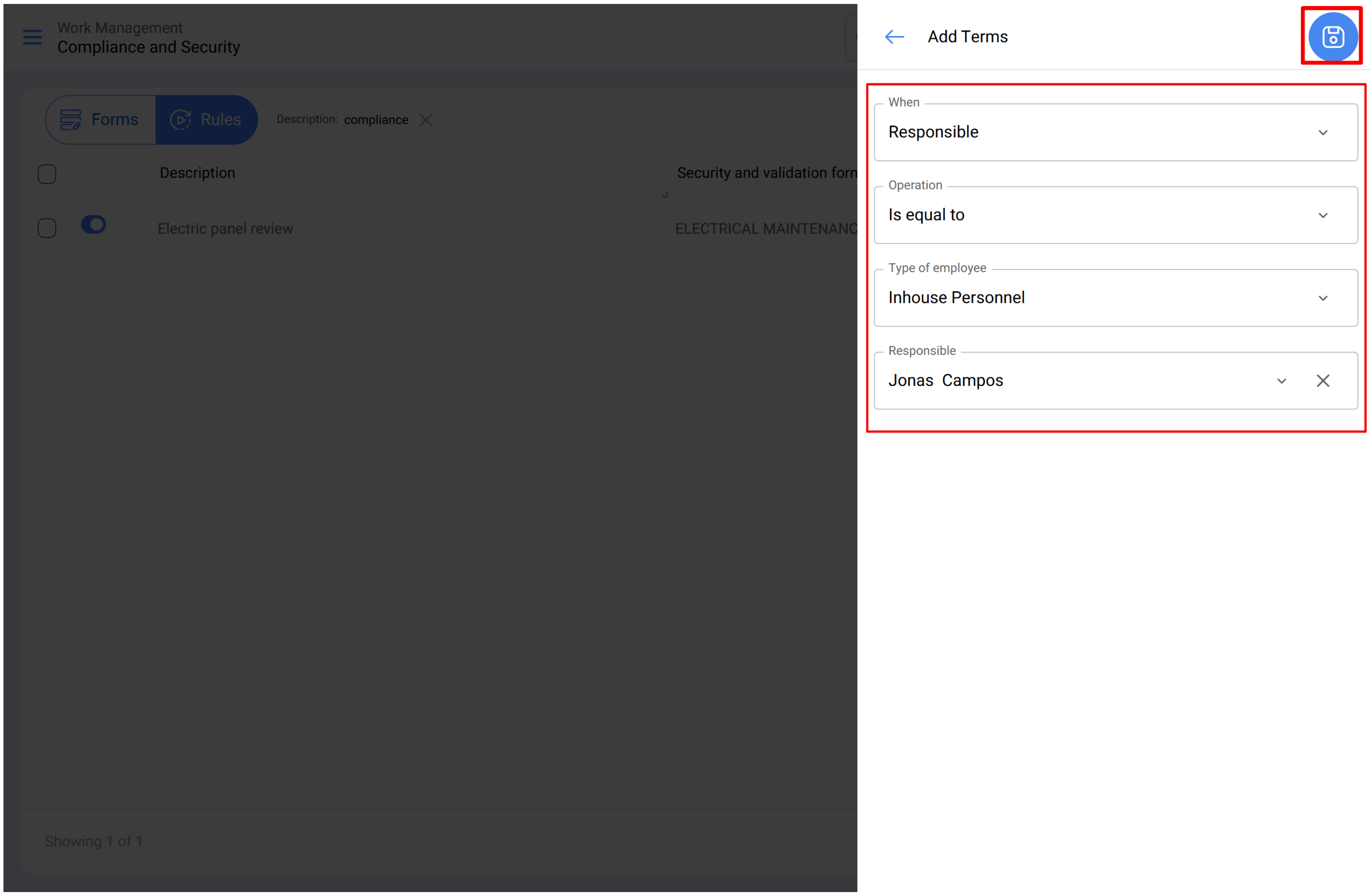
Based on this definition, the system will determine whether the rule should be applied during form execution.

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:



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.