

## 4.4.1 Rule Assignment and Rule Definition

### RuleAssignment

A Rule Assignment executes a Rule Expression for a specific target. It contains the following entities.

- **Target:** The item that will be affected by the Rule or for which the RuleAction is being performed.
- **RuleRef:** The RuleOID that will be executed and specifications for when the Rule should be run.

Within a RuleAssignment you may have one or more RuleRefs.

A RuleRef also specifies the Action(s) you want the Rule to perform.

[Out of the box actions by OpenClinica currently include](#)

- o DiscrepancyNoteAction
- o EmailAction
- o NotificationAction
- o InsertAction
- o ShowAction
- o HideAction
- o EventAction

- **Run:** This specifies when the Rule should be executed. Specify "true" or "false" (must be in lower case) for each possible status as follows:

If "false" for any of the following options, the Rule will not execute for the specified setting.

- o **AdministrativeDataEntry**

If "true" the Rule will run if a user saves a change to the data after the form has been marked "complete."

- o **InitialDataEntry**

If "true" the Rule will run when the user clicks Save after initial data entry.

- o **DoubleDataEntry**

If "true" the Rule will run when the user clicks Save after double data entry.

- o **ImportData**

If "true" the Rule will run when data is imported into the form.

- o **Batch**

If "true" the Rule will run if a user runs the Rule in batch mode (via Tasks>Monitor and Manage Data>Rules and then click the Run icon OR via Tasks>Monitor and Manage Data>CRFs>View the CRF and click the link Run All Rules for This CRF).

## **RuleDef**

Rule Definitions in OpenClinica are independent entities. The same Rule definitions could be used in multiple assignments. Rule Definition elements are themselves made of multiple elements.

- **RuleOID**

A user-defined, unique OID for the Rule. This must be entered in all upper-case alphanumeric characters. Underscores are also allowed.

- **Name**

A brief, user-provided description of what the Rule does. This is only visible on the Manage Rules screen (Tasks>Monitor and Manage Data>Rules).

- **Description**

A detailed, user-provided description of what the Rule does. This is only visible on the Manage Rules screen if the user clicks the Show More link above the table. (Tasks>Monitor and Manage Data>Rules, and then click Show More).

- **Expression**

The condition that triggers the Rule action. Expressions can include logical operators, mathematical operators, and can be performed using dates. For more information see [Expression Element](#) and [Rule Expressions](#).

Approved for publication by Ben Baumann. Signed on 2015-07-07 2:33PM

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