

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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