



6.5.1 Manage Rules (Study Level)

The Manage Rules page allows you to view and manage the Rules for your Study. The list of Rules is filtered by default to display only Available (active) Rules.

The screenshot shows the 'Manage Rules for Default Study' page in OpenClinica. The page title is 'Manage Rules for Default Study'. The table below shows the list of rules:

CRF	Item Name	Rule Name	Rule QED	Expression	Execute On	Action Summary	Actions
31jantlorgan	08PE1	08PE1	I_001AL_31JANTLORGAN eq 31	true	false	Type: ShowAction Message: "You selected Other, please specify" Run On: InitialDataEntry, DoubleDataEntry, AdministrativeDataEntry DestinationProperty: I_001AL_31JANTLIFOTHER	[Icons]
can_phy16	RD01	RD01	I_NONCA_CAN_PHY16 eq 2 and I_NONCA_CAN_PHY16 eq "test"	true		Type: DiscrepancyNoteAction Message: "this is a test" Run On: InitialDataEntry, DoubleDataEntry, AdministrativeDataEntry	[Icons]
Demographics- Dynamics	demo1	123	123	I_DEMOG_DEMO4 eq 7 and I_DEMOG_DEMO16 ne 7	true	Type: EmailAction To: me@me.com Message: "abc" Run On: InitialDataEntry	[Icons]
demo16	D0003	D0003	I_PAULS_PG_ITEM3 eq 3	true		Type: DiscrepancyNoteAction Message: "This is eq 1 " Run On: InitialDataEntry, DoubleDataEntry, AdministrativeDataEntry	[Icons]
demo2	D0002	D0002	I_BASIC_DEMO2 eq "1"	true		Type: DiscrepancyNoteAction Message: "should be eq 0" Run On: InitialDataEntry, DoubleDataEntry, AdministrativeDataEntry	[Icons]

View or Restore Removed Rule(s)

To view and/or restore Rules that have been removed, click the **Show More** link above the table, click in the **Rule Status** column, and click **Removed** from the dropdown list.

Manage Rules page (Study Level)

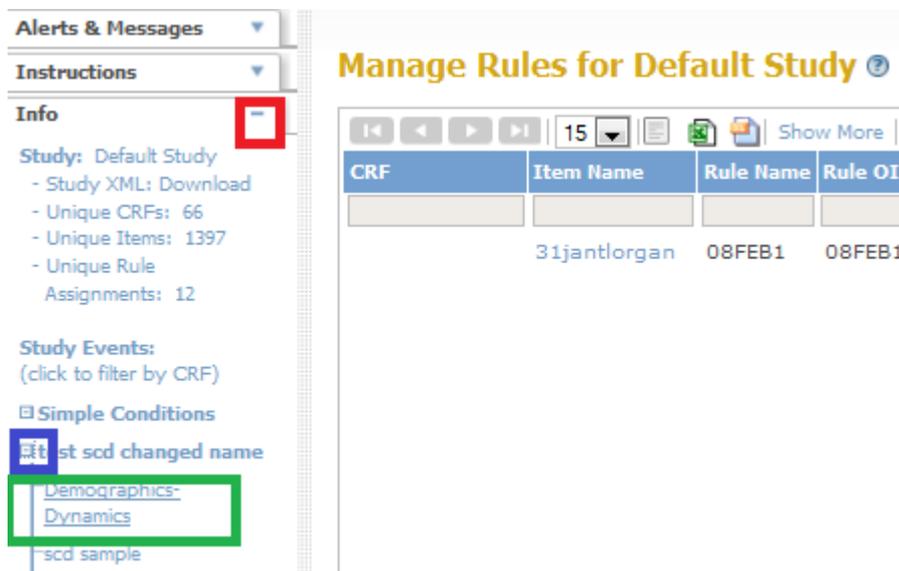
The column headers (once **Show More** link is selected) and the cells with detail information in the Manage Rules table:

Column	Description
Run On Schedule	True or False, indicating whether the Rule was created to run at a set time on a daily basis using the RunOnSchedule statement.
Run Time	If Run On Schedule is True, this is the time that the Rule is scheduled to run.
Target	The Target element defined in the RuleAssignment in the XML file.
Study Event	The Study Event affected by the Rule.
CRF	The CRF affected by the Rule.

Version	The version of the CRF affected by the Rule.
Group	The Group Label affected by the Rule.
Item Name	The Item Name affected by the Rule.
Rule Name	The user-defined brief description of the Rule.
Rule OID	The user-provided OID that uniquely identifies the Rule.
Rule Description	The user-provided statement describing the actions the Rule will perform.
Expression	The condition that must be met to trigger the Rule
CRF Validations	Yes or No to indicate whether validation exists for the item in a CRF Template.
Execute On	True or False to indicate whether the Rule should execute if the Expression condition is met (TRUE) or not met (FALSE).
Action Type	The action that the Rule will execute. For example, DiscrepancyNoteAction, EmailAction, NotificationAction, InsertAction, etc.
Action Summary	A summary of the Rule characteristics. This includes the action type prompted if the underlying condition is met, when it is run, and Rule properties. Role-based actions that can be applied to the Rule. These depend on User Role . See Overview section for more details.

Actions	 View Displays the details of this rule
	 Run Runs the rule as specified
	 Remove Removes a Rule assignment so it will not be executed unless it is restored
	 Restore Restores a Rule assignment that had been removed (must click Show More to display this action)
	 Download Downloads the XML code for the Rule
	 Test Opens the Test Rules page and allows you to do basic testing of the Rule

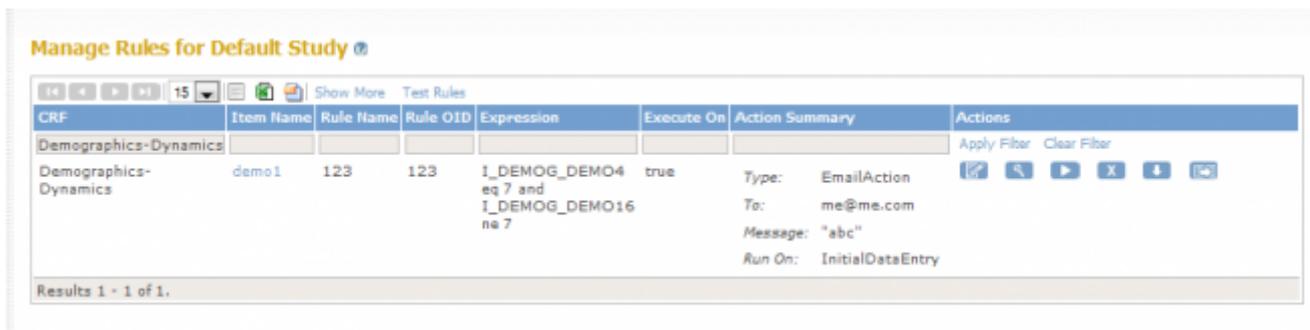
Use the column headers and filter fields (grey boxes) to sort and filter, or filter by Event CRF by using the tree in the 'Info' panel which is located on the left hand pane (see figure below). By default the table is filtered by Rule Status (Available) and sorted by Item Name.



The screenshot shows the 'Manage Rules for Default Study' interface. On the left, the 'Info' panel is expanded, showing a tree view of 'Demographics-Dynamics' highlighted in green. A red box highlights a button in the 'Info' panel. The main table has columns for CRF, Item Name, Rule Name, and Rule OI. A row is visible with Item Name '31jantlorgan', Rule Name '08FEB1', and Rule OI '08FEB1'.

Filtering Rules Using the Info Pane

1. Locate the Info pane. Verify if it is expanded. If it is not, click on the maximize icon on the right (red box).
2. Click on the expand icon to the left of Study Event you are interested in (blue box)
3. A list of CRFs corresponding to the Study Event is populated in a tree hierarchy. Select the CRF (green box)
4. The Rules are filtered based on the CRF and Study Event you selected (see figure below)



The screenshot shows a web interface titled "Manage Rules for Default Study". It features a table with columns: CRF, Item Name, Rule Name, Rule OID, Expression, Execute On, Action Summary, and Actions. The first row shows a rule for "Demographics-Dynamics" with Item Name "demo1", Rule Name "123", Rule OID "123", and an expression involving "I_DEMOG_DEMO4" and "I_DEMOG_DEMO16". The Action Summary indicates it is an "EmailAction" with "To: me@me.com" and "Message: 'abc'", running on "InitialDataEntry".

CRF	Item Name	Rule Name	Rule OID	Expression	Execute On	Action Summary	Actions
Demographics-Dynamics	demo1	123	123	I_DEMOG_DEMO4 eq 7 and I_DEMOG_DEMO16 ne 7	true	Type: EmailAction To: me@me.com Message: "abc" Run On: InitialDataEntry	Apply Filter Clear Filter [Icons]

Results 1 - 1 of 1.

Filter Result

The green arrows at the top of the table allow you to navigate through the pages. If you have fewer than 15 Rules in your study the arrows will be greyed out and only one page will be displayed. With the drop-down menu next to the arrows you can choose how many subjects should be displayed on one page (15, 25, or 50). You will also see a Test Rules link which, when you select it, brings you to the Test Rules page. You may click on the action icons to view, test, execute and manage these rules.

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