

# Banner Enrollment Management Suite Relationship Management Business Rules Administration Training Workbook

*Release 1.4 - August 2010  
Last updated 12/01/2010*



**SUNGARD** HIGHER EDUCATION

What can we help you achieve?

---

**SunGard Higher Education**  
4 Country View Road  
Malvern, Pennsylvania 19355  
United States of America  
(800) 522 - 4827

**Customer Support Center website**  
<http://connect.sungardhe.com>

**Distribution Services e-mail address**  
[distserv@sungardhe.com](mailto:distserv@sungardhe.com)

**Other services**

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

**Trademark**

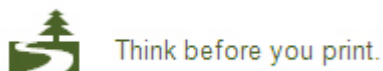
Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.

**Revision History Log**

Publication Date	Summary
12/01/2010	Revised to include note about not including comments in a business rule when the rule will be used in a campaign.

**Notice of rights**

Copyright © SunGard Higher Education 2005-10. This document is proprietary and confidential information of SunGard Higher Education Inc. and is not to be copied, reproduced, lent, displayed or distributed, nor used for any purpose other than that for which it is specifically provided without the express written permission of SunGard Higher Education Inc.



# Table of Contents

---

<b>Business Rules Management.....</b>	<b>4</b>
Business Rules Management .....	5
Business Rules Training Scenario.....	6
Business Rules Overview.....	7
Rules - Overview .....	8
Creating a Rule .....	9
Editing a Rule.....	12
Add Statements to a Rule .....	15
Delete a Rule .....	22
Constants - Overview.....	24
Creating a Constant.....	25
Edit an Existing Constant .....	28
Delete a Constant.....	31
Rule Sets - Overview .....	33
Creating a New Rule Set .....	34
Editing a Rule Set's Attributes .....	37
Add Rules to a Rule Set .....	40
Delete a Rule Set .....	45
URIs - Overview .....	46
Creating a New URI .....	47
Editing an Existing URI's Attributes .....	49
Add a Rule Set to a URI .....	52
Test Parameters of a URI.....	54

# Business Rules Management



## Introduction

The Business Rules Management functions allow administrators to create, edit, delete and search for business rules, rule sets and related components in the Enrollment Management system.

## Intended audience

Those administrators who will be responsible for setting up and managing business rules at an institution.

# Business Rules Management

---

## Introduction

A rule is a piece of code that carries out an action. Rules are the basic building blocks used to analyze data and perform tasks.

In the Enrollment Management system, administrators can:

- create, modify and manage business rules
- create, modify and manage constants
- create, modify and manage rule sets, and assign rules to them
- create, modify and manage URIs (Uniform Resource Identifiers), which are the unique names used to identify rule sets

# Business Rules Training Scenario

---

## Introduction

In this section, you will be creating and maintaining business rules, rule sets and related components in Enrollment Management.

## Robert Boyle, Administrator

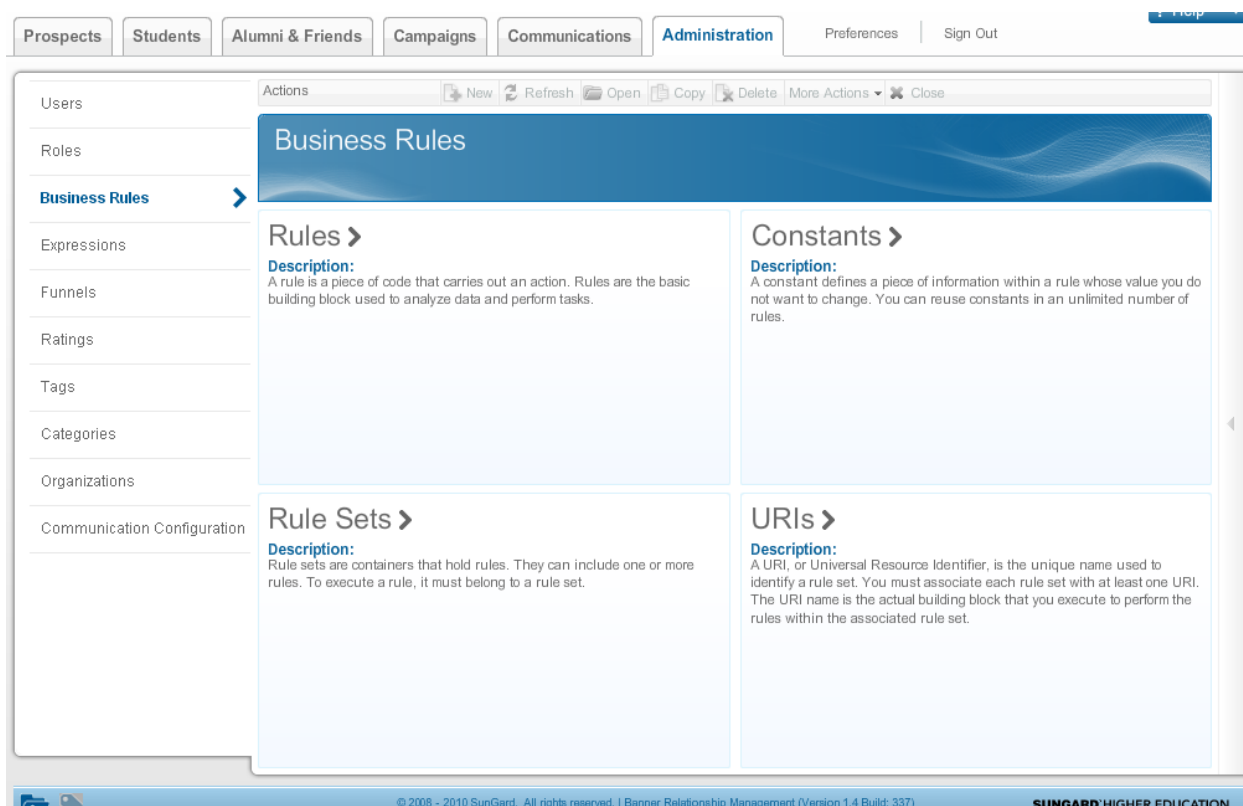
Robert Boyle, an administrator at SunGard University, will be working in the Enrollment Management workspace. He wishes to set up business rules that will define actions to be carried out in Enrollment Management.

# Business Rules Overview

## Introduction

From the **Administration** tab, clicking **Business Rules** accesses the Business Rules view. This view allows the administrator access to sections for creating rules, rule sets, constants and URIs. This workbook will explore each of these areas in turn.

## Business Rules view



# Rules - Overview

## Introduction

Clicking **Rules** from the Business Rule view will access the Rules view.

A rule is a piece of code that carries out an action. Rules are the basic building block used to analyze data and perform tasks.

**Important:** When creating a rule, do not add a comment. When using a rule in a campaign the rest of the rule will not be executed from the point of the comment forward.

## Rules view

The screenshot shows the SunGard Relationship Management (Version 1.4 Build: 338) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled 'Rules' and displays a table of 31 rules. The table has columns for Rule Name, Description, Type, and Required. The right sidebar contains sections for Constants, Rule Sets, and URIs.

Rule Name	Description	Type	Required
GetBannerEMDataSource	Returns the BannerEMD:	GROOVY_STATEMENT	Yes
GetProspectAddressFilter	Returns the STVATYP Ad	GROOVY_STATEMENT	Yes
GetProspectEmailFilter	Returns the GTVEMAL E	GROOVY_STATEMENT	Yes
GetProspectTelephoneFilt	Returns the preferred ST	GROOVY_STATEMENT	Yes
MCC-CommunicationField	MCC Address Communica	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC AdmissionsChecklist	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC AdmissionsCurricul	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC Advisors Communica	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC ApplicationDecision	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC AssignedRecruiter C	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC CommunicationOpto	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC Curriculum Commur	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC Email Communication	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC FieldOfStudy Commu	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC GeographicRegion C	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC HighSchool Commur	SQL_PREPARED_STATE	Yes
MCC-CommunicationField	MCC IdentificationBio Con	SQL_PREPARED_STATE	Yes



# Creating a Rule

## Introduction

New rules can be created on the Rules view.

## Scenario

Robert Boyle would like to create a new business rule.

## Rules view

This view displays the existing rules. Note that the blue boxes on the right-hand side display all constants, rule sets and URIs affiliated with the selected rule.

The screenshot shows the SunGard Banner Relationship Management (Version 1.4 Build: 338) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled 'Rules' and displays a table of 31 rules. The table has columns for Rule Name, Description, Type, and Required. The right-hand side of the interface features three blue boxes labeled 'Constants', 'Rule Sets', and 'URIs'.

Rule Name	Description	Type	Required
GetBannerEMDataSource	Returns the BannerEMD	GROOVY_STATEMENT	Yes
GetProspectAddressFilter	Returns the STVATYP Ad	GROOVY_STATEMENT	Yes
GetProspectEmailFilter	Returns the GTVEMAL E	GROOVY_STATEMENT	Yes
GetProspectTelephoneFilter	Returns the preferred ST	GROOVY_STATEMENT	Yes
MCC-CommunicationField	MCC Address Communica	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC AdmissionsChecklist	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC AdmissionsCurricul	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC Advisors Communica	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC ApplicationDecision	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC AssignedRecruiter C	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC CommunicationOptO	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC Curriculum Commur	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC Email Communication	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC FieldOfStudy Commu	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC GeographicRegion C	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC HighSchool Commur	SQL_PREPARED_STATEMENT	Yes
MCC-CommunicationField	MCC IdentificationBio Con	SQL_PREPARED_STATEMENT	Yes

## Steps

Steps to create a new business rule:

1. From the Administration Tab, click **Business Rules**.
2. From the Business Rules view, click **Rules**.
3. On the Rule Actions bar, click **New**.

A screenshot of a 'Create Rule' dialog box. The dialog has a blue header bar with the title 'Create Rule' and standard window control buttons (minimize, maximize, close). Below the header is a white form area. It contains three fields: 'Name:' with a red asterisk indicating it is required, 'Description:', and 'Required:' with an unchecked checkbox. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

4. Enter a name for the business rule in the **Name** field.
5. Enter a description for the rule in the **Description** field, if desired.
6. Select the **Required** check box if the new rule should be considered required.
7. Click **OK** to create the new rule.

## Exercise

Create one or more new business rules in the system.

# Editing a Rule

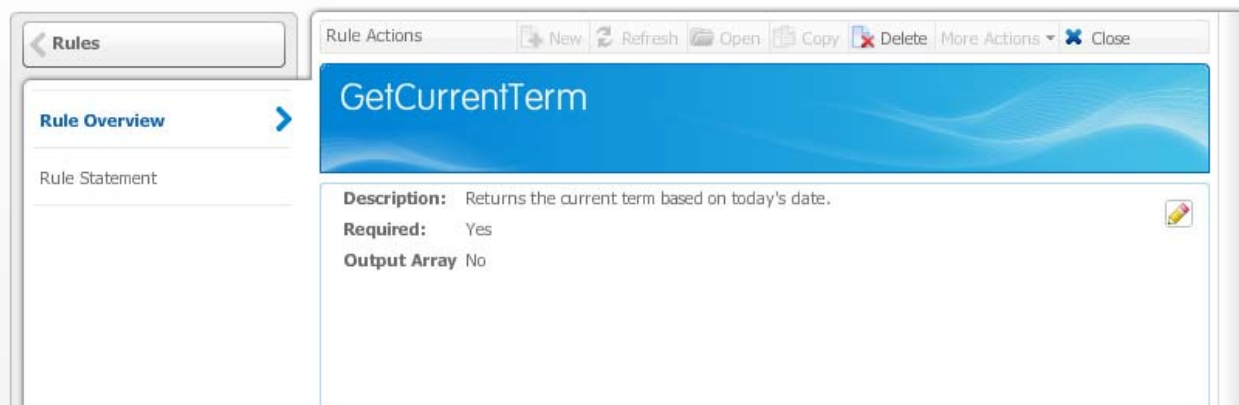
## Introduction

Administrators may edit the name, description and required status of existing rules.

## Scenario


Robert Boyle made a minor error in the **Description** field of one of the rules that he just created, and would like to go in and edit the affected rule.

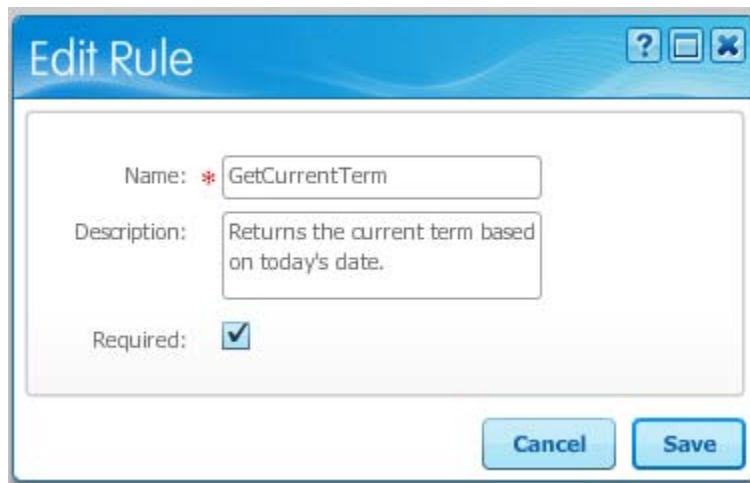
## Rule Overview view



## Steps

Steps to edit an existing rule:

1. From the Rules view, double-click an existing rule to view its information.
2. Click the Edit (  ) icon to edit the rule.



The image shows a Windows-style dialog box titled "Edit Rule". It has a blue header bar with standard window controls (help, maximize, close) on the right. The main content area is white and contains three fields: "Name:" with a red asterisk and a text box containing "GetCurrentTerm"; "Description:" with a text box containing "Returns the current term based on today's date."; and "Required:" with a checked checkbox. At the bottom right, there are two buttons: "Cancel" and "Save".

3. Modify the fields as desired.
4. Click **OK** to save your changes.

## Exercise

Modify the name and description of one or more of your created rules.

# Add Statements to a Rule

---

## Introduction

Adding statements to a rule indicates the actions that the rule is meant to perform.

## Scenario

Having fixed his created rule, Robert Boyle would like to add statements to that rule.

1. *Journal of the American Medical Association*, 2000; 284: 2669-2674.

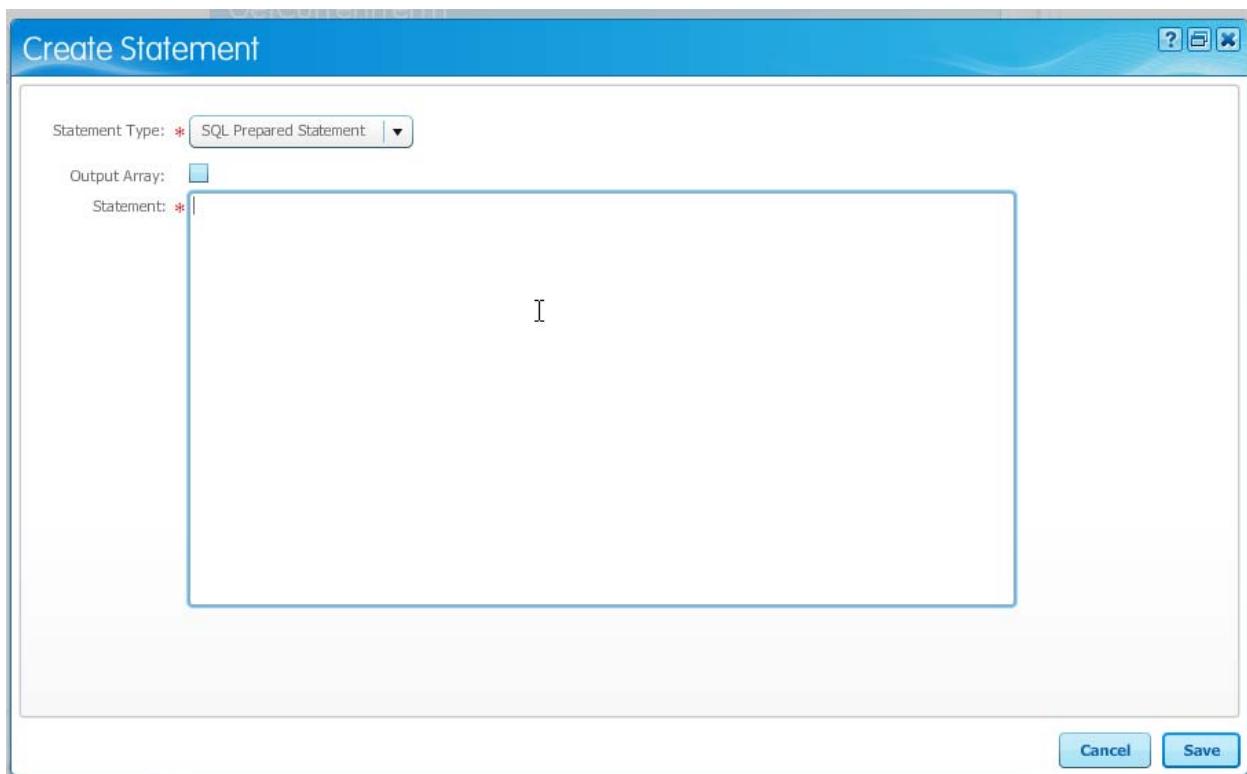


## Steps

Steps to add statements to an existing rule:

1. From the Rules view, double-click a rule to open it.
2. Click **Rule Statement** to view statements currently associated with the role
3. Click the **Edit** (✎) icon in the Statement block to add a statement to the role.

Note: If the rule has no statement associated with it, such as when creating a new rule, you may click "[Add Statement](#) to this role" or the Edit icon to access the Create Statement screen.



The screenshot shows a 'Create Statement' dialog box with a blue header bar. Inside the dialog, there are three fields: 'Statement Type' with a dropdown menu showing 'SQL Prepared Statement', 'Output Array' with a checkbox, and 'Statement' with a large text area. The 'Statement' field has a red asterisk next to it and a cursor is visible. At the bottom right, there are 'Cancel' and 'Save' buttons.

5. Select a **Statement Type** from the drop-down list. Statement types include:
- SQL Callable Statements (Stored Procedures/DB APIs)
  - SQL Prepared Statements (Queries, DB functions)
  - Groovy (Object oriented scripting language) – dynamic language akin to Ruby that uses Java syntax

The screenshot shows a 'Create Statement' dialog box with a blue header. On the left, there are three labels: 'Statement Type: \*', 'Output Array:', and 'Statement: \*'. The 'Statement Type' dropdown menu is open, showing three options: 'SQL Callable Statement', 'SQL Prepared Statement', and 'Groovy' (which is highlighted in green). The 'Output Array' checkbox is checked. The 'Statement' text area contains the following Groovy code: `def execute( String ProspectAddressFilter ) { return ProspectAddressFilter; }`. At the bottom right, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted in blue.

6. Select the **Output Array** check box to allow arrays of arguments to be returned, if desired.
7. Enter the statement of the desired type in the **Statement** field.
8. Click **Save** to save your statement and exit.

- Rules

Rule Overview

**Rule Statement**

GetProspectAddressFilter

**Statement:**

class GetProspectAddressFilter { def execute(String ProspectAddressFilter) {  
return ProspectAddressFilter; } }

**Statement Type:** GROOVY\_STATEMENT


**Output Array:** No

Parameters

Flag	Name	Description	Input Req	Output Garant
Output	AddressFilter	The STVATYP Address Type used to provi	No	Yes
Input	ProspectAddress	The STVATYP Address Type used to provi	No	No

Validate
- Open Items

▶ RuleDetailPage

10. Click the **Edit** () icon for either the statement or the parameters to edit them.

Edit Parameters

Statement:

class GetProspectAddressFilter { def execute( String ProspectAddressFilter ) { return ProspectAddressFilter; } }

Output Array:

No

Parameters

	Flag	Name	Description	Input Req	Output Guaran	Constant	Fixed	Value		
Output		AddressFilter	The STVATYP A	No	Yes		...	No	String	X
Input		ProspectAddress	The STVATYP A	No	No	ProspectAddressFilter	...	Yes	String	X

Generate Parameters

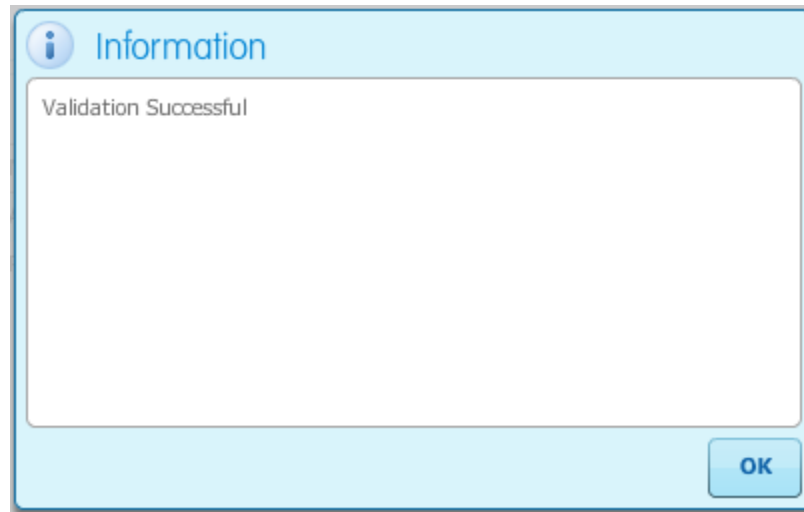
Add Input Parameter

Add Output Parameter

Cancel

Save

11. Click **Generate Parameters** to generate parameters based on the statement, if desired.
12. Click **Add Input Parameter** or **Add Output Parameter** to add additional parameters to the parameter set, if desired.
13. If you have made changes, click **Save** to save them and return to the Rule Statement view.
14. Click **Validate** to validate the selected statement.



## Exercise

Add statements to one or more of the created rules.

# Delete a Rule

---

## Introduction

Deleting a business rule can be performed on the Rule Actions bar.

## Scenario

Having created business rules, Robert Boyle would like to delete one of them.

## Steps

Steps to delete a rule:

1. From the Rules view, double-click a rule to view its information.
2. From the Rule Actions bar, click **Delete**.

# Constants - Overview

## Introduction

Clicking **Constants** from the Business Rules view will access the Constants view.

A rule is a piece of code that carries out an action. Rules are the basic building block used to analyze data and perform tasks.

## Constants view

This view displays the existing constants. Note that the blue boxes on the right-hand side display all rules, rule sets and URIs affiliated with the selected constant.

The screenshot displays the 'Constants' view within a 'Business Rules' application. The main area shows a table of constants:

Constant Name	Value	Description	Required
Anniversary Date	1982-01-05	A seemingly random annive	No
BannerEMDataSource	EnrollmentManagementCon	The datasource value when	Yes
Passing FICO score	650	The minimally acceptable F	No
pi	3.14	The value of pi to 2 decimal	No
ProspectAddressFilter	MA	The preferred STVATYP Ad	Yes
ProspectEmailFilter	PERM	The preferred GTVEMAL En	Yes
ProspectTelephoneFilter	MA	The preferred STVTELE Tel	Yes
State Translation Table	STVSTAT	The Banner translation tat	No

On the right side of the interface, there are three blue boxes labeled 'Rules', 'Rule Sets', and 'URIs', which are currently empty. The left sidebar shows a navigation menu with 'Constants' selected.



# Creating a Constant

---

## Introduction

Constants are created on the Constants view.

## Scenario

Robert Boyle would like to define certain constants to which his created rules will refer.

## Steps

Steps to create a constant:

1. From the Business Rules view, click **Constants**.
2. From the Constants view, click **New** on the Rule Constant Actions bar.

A screenshot of a 'Create Constant' dialog box. The dialog has a blue header bar with the title 'Create Constant' and standard window controls (help, maximize, close). The main area contains four input fields: 'Name:' with a red asterisk, 'Type:' with a dropdown arrow, 'Value:' with a red asterisk, and 'Description:'. Below these is a 'Required:' checkbox. At the bottom right are 'Cancel' and 'Save' buttons.

3. Enter values in the fields, including the **Name**, **Type**, **Value** and **Description** of the new constant.
4. Select the **Required** check box if the constant is to be considered required.
5. Click **Save** to save your new constant.

## Exercise

Create one or more constants in the system.

# Edit an Existing Constant

## Introduction

Existing constants may be modified by administrators.

## Scenario

Robert Boyle made an error when defining a constant and would like to rectify this by changing the constant's assigned value.

## Constant view

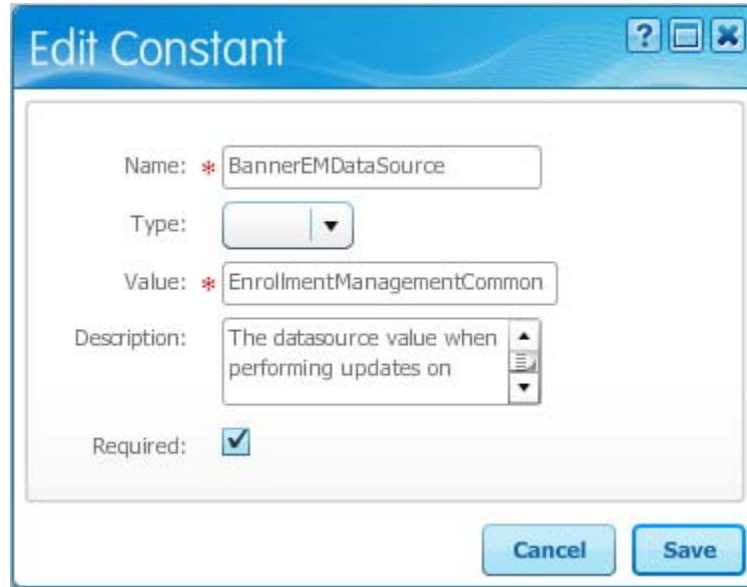
The screenshot displays the Business Rules Administration (BRA) interface. On the left, a navigation pane shows 'Business Rules' with sub-items: 'Rules', 'Constants' (selected), 'Rule Sets', and 'URIs'. Below this is an 'Open Items' section. The main area is titled 'Constants' and features a search bar with 'Search by Name' and an 'Advanced Search' dropdown. Above the table is a toolbar with 'New', 'Refresh', 'Open', 'Copy', 'Delete', 'More Actions', and 'Close'. The table lists constants with columns: Constant Name, Value, Description, and Required. The right sidebar contains three expandable sections: 'Rules', 'Rule Sets', and 'URIs', all currently collapsed.

Constant Name	Value	Description	Required
Anniversary Date	1982-01-05	A seemingly random annive	No
BannerEMDataSource	EnrollmentManagementCon	The datasource value when	Yes
Passing FICO score	650	The minimally acceptable F	No
pi	3.14	The value of pi to 2 decimal	No
ProspectAddressFilter	MA	The preferred STVATYP Ad	Yes
ProspectEmailFilter	PERM	The preferred GTVEMAL En	Yes
ProspectTelephoneFilter	MA	The preferred STVTELE Tel	Yes
State Translation Table	STVSTAT	The Banner translation tat	No

## Steps

Steps to edit an existing constant:

1. From the Constants view, double-click an existing constant to view its information.
2. Click the Edit (✎) icon to edit the contents of the constant.



The screenshot shows a dialog box titled "Edit Constant" with a blue header bar containing help, maximize, and close icons. The dialog contains the following fields and controls:

- Name:** A text box with the value "BannerEMDataSource".
- Type:** A dropdown menu.
- Value:** A text box with the value "EnrollmentManagementCommon".
- Description:** A text box with the value "The datasource value when performing updates on", accompanied by a list icon.
- Required:** A checkbox that is checked.

At the bottom right of the dialog are two buttons: "Cancel" and "Save".

3. Modify the fields as necessary.
4. Click **Save** to save your changes.

## Exercise

Modify one of the constants created in a previous exercise.

# Delete a Constant

---

## Introduction

Deleting a constant can be performed on the Constant Actions bar.

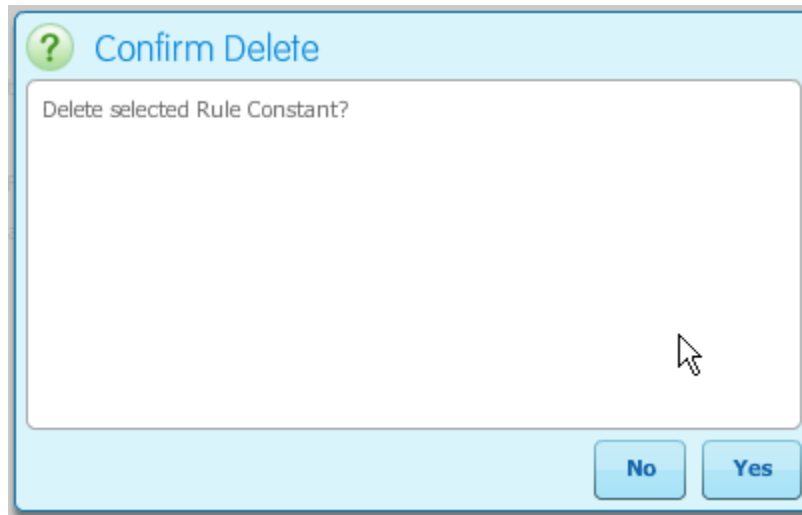
## Scenario

Having created constants, Robert Boyle would like to delete one of them.

## Steps

Steps to delete a rule:

1. From the Constants view, double-click a constant to view its information.
2. From the Constant Actions bar, click **Delete**.



3. You will be prompted to confirm the deletion; click **Yes** to confirm.



# Rule Sets - Overview

## Introduction

Clicking **Rule Sets** from the Business Rules view will access the Rule Sets view.

Rule sets are containers that hold rules. They can include one or more rules. To execute a rule, it must belong to a rule set.

## Rule Sets view

The screenshot displays the 'Rule Sets' view within a 'Business Rules' application. The main area contains a table of rule sets. The left sidebar has a 'Business Rules' menu with 'Rule Sets' selected. The right sidebar has three sections: 'URIs', 'Rules', and 'Constants', all of which are currently empty.

Rule Set Name	Description	Required
capitalize	Capitalize input text	No
cd 787 rules set for rule	Defect 787 check	No
CheckApplicationExists		No
CheckApplicationStatus		No
code lookup	Banner code look-up.	No
fico-test	FICO test	No
GetBannerEMDataSource	Returns the BannerEMDataSource.	Yes
GetCurrentTerm	Returns the current term based on to	Yes
GetProspectAddressFilter	Returns the STVATYP Address Type	Yes
GetProspectEmailFilter	Returns the GTVEMAL Email Type us	Yes
GetProspectTelephoneFilter	Returns the preferred STVTELE Telep	Yes
GetRecruiterRegion	Returns the region (state code) for a	Yes
HelloWorld:1.0	Hello World	Yes
HelloWorld:1.1	Hello World	No
ValueOfPi	The value of pi as obtained from the	Yes
welcome message	This rule demonstrates rule chaining	No

# Creating a New Rule Set

## Introduction

Rule sets are created on the Rule Sets view.

## Scenario

Having created business rules, Robert Boyle would now like to group them into rule sets.

## Rule Sets view

This view displays the existing rule sets. Note that the blue boxes on the right-hand side display all rules, constants and URIs affiliated with the selected rule set.

The screenshot shows the 'Rule Sets' view in a software application. The main pane displays a table of rule sets with the following data:

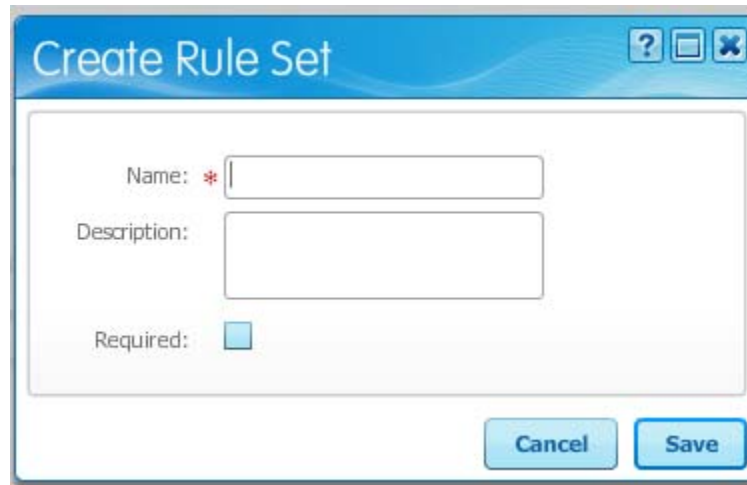
Rule Set Name	Description	Required
capitalize	Capitalize input text	No
cd 787 rules set for rule	Defect 787 check	No
CheckApplicationExists		No
CheckApplicationStatus		No
code lookup	Banner code look-up.	No
fico-test	FICO test	No
GetBannerEMDataSource	Returns the BannerEMDataSource.	Yes
GetCurrentTerm	Returns the current term based on to	Yes
GetProspectAddressFilter	Returns the STVATYP Address Type	Yes
GetProspectEmailFilter	Returns the GTVEMAL Email Type us	Yes
GetProspectTelephoneFilter	Returns the preferred STVTELE Telep	Yes
GetRecruiterRegion	Returns the region (state code) for a	Yes
HelloWorld:1.0	Hello World	Yes
HelloWorld:1.1	Hello World	No
ValueOfPi	The value of pi as obtained from the	Yes
welcome message	This rule demonstrates rule chaining	No

The left sidebar contains navigation links: Business Rules, Rules, Constants, Rule Sets (selected), and URIs. The right side features three blue boxes labeled URIs, Rules, and Constants, which display the associated items for the selected rule set.

## Steps

Steps to create a new rule set:

1. From the Business Rules view, click **Rule Sets**.
2. From the Rule Sets view, click **New** on the Rule Set Actions bar.

A screenshot of a 'Create Rule Set' dialog box. The dialog has a blue header bar with the title 'Create Rule Set' and three icons (help, maximize, close) on the right. The main area is white and contains three fields: 'Name:' with a red asterisk and an empty text box, 'Description:' with an empty text box, and 'Required:' with an unchecked checkbox. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

3. Enter a **Name** and **Description** for your new rule set.
4. Select the **Required** check box if the rule set is to be considered required.
5. Click **OK** to create the new rule set.

## Exercise

Create one or more rule sets in the system.

# Editing a Rule Set's Attributes

## Introduction

Once a rule set has been created, an administrator may edit its attributes. Note that this is different from actually adding rules to the rule set.

## Scenario

Robert Boyle has received new information and wishes to update his rule set definitions accordingly.

## Rule Sets view

The screenshot displays the 'Rule Sets' view within a business rules administration interface. The main window is titled 'Rule Set Actions' and contains a 'Rule Sets' section with a search bar and an 'Advanced Search' button. Below this is a table listing various rule sets with columns for 'Rule Set Name', 'Description', and 'Required'.

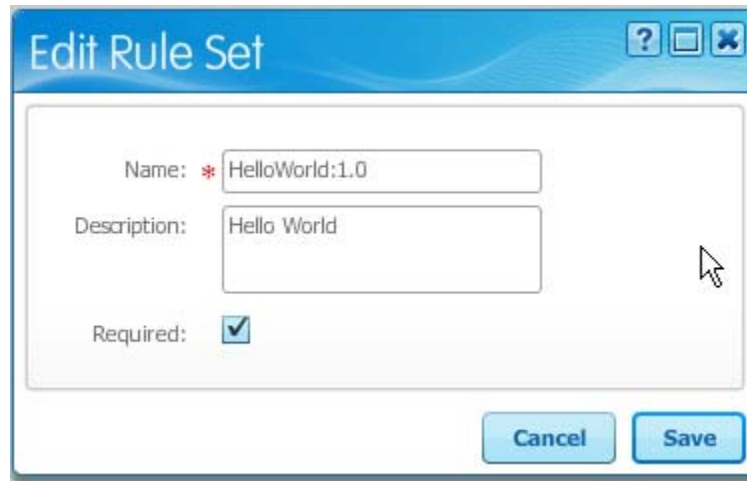
Rule Set Name	Description	Required
capitalize	Capitalize input text	No
cd 787 rules set for rule	Defect 787 check	No
CheckApplicationExists		No
CheckApplicationStatus		No
code lookup	Banner code look-up.	No
fico-test	FICO test	No
GetBannerEMDataSource	Returns the BannerEMDataSource.	Yes
GetCurrentTerm	Returns the current term based on to	Yes
GetProspectAddressFilter	Returns the STVATYP Address Type	Yes
GetProspectEmailFilter	Returns the GTVEMAL Email Type us	Yes
GetProspectTelephoneFilter	Returns the preferred STVTELE Telep	Yes
GetRecruiterRegion	Returns the region (state code) for a	Yes
HelloWorld:1.0	Hello World	Yes
HelloWorld:1.1	Hello World	No
ValueOfPi	The value of pi as obtained from the	Yes
welcome message	This rule demonstrates rule chaining	No

On the left side, there is a sidebar with a 'Business Rules' tab and a list of items: 'Rules', 'Constants', 'Rule Sets' (selected), and 'URIs'. At the bottom left, there is an 'Open Items' section. On the right side, there are three expandable panels: 'URIs', 'Rules', and 'Constants', each with a list of items.

## Steps

Steps to edit an existing rule set:

1. From the Rule Sets view, double-click a rule set to view its information.
2. Click the **Edit** (✎) icon to edit the rule set's attributes.

The image shows a screenshot of a software window titled "Edit Rule Set". The window has a blue header bar with standard window controls (help, maximize, close) on the right. The main content area is white and contains three labeled fields: "Name:" with a red asterisk icon and the text "HelloWorld:1.0"; "Description:" with the text "Hello World"; and "Required:" with a checked checkbox. At the bottom right of the window are two buttons: "Cancel" and "Save". A mouse cursor is visible over the "Save" button.

3. Modify the fields as desired.
4. Click **Save** to save your changes.

## Exercise

Modify the name and description of one or more of your rule sets from a previous exercise.

# Add Rules to a Rule Set

## Introduction

Once a rule set has been created, you will want to add desired business rules to it.

## Scenario

Robert Boyle wishes to populate his new rule set with his previously created business rules.

## Rule Sets view

The screenshot displays the 'Rule Sets' view in a software application. The main area shows a table of rule sets with the following data:

Rule Set Name	Description	Required
capitalize	Capitalize input text.	No
cd 787 rules set for rule	Defect 787 check	No
CheckApplicationExists		No
CheckApplicationStatus		No
code lookup	Banner code look-up.	No
fico-test	FICO test	No
GetBannerEMDataSource	Returns the BannerEMDataSource.	Yes
GetCurrentTerm	Returns the current term based on to	Yes
GetProspectAddressFilter	Returns the STVATYP Address Type u	Yes
GetProspectEmailFilter	Returns the GTVEMAL Email Type us	Yes
GetProspectTelephoneFilter	Returns the preferred STVTELE Telep	Yes
GetRecruiterRegion	Returns the region (state code) for a	Yes
HelloWorld:1.0	Hello World	Yes
HelloWorld:1.1	Hello World	No
ValueOfPi	The value of pi as obtained from the	Yes
welcome message	This rule demonstrates rule chaining	No

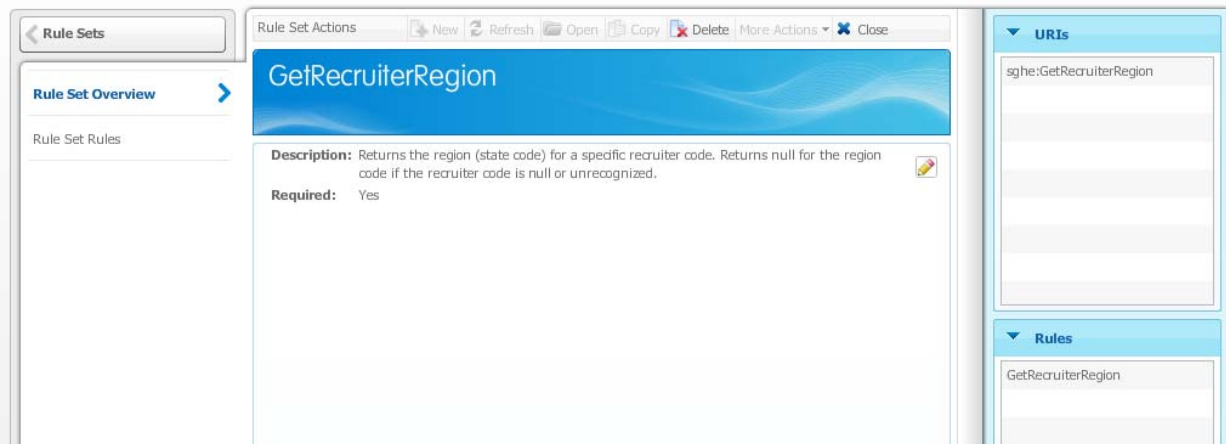
On the right side of the interface, there are three panels: 'URIs', 'Rules', and 'Constants'. The 'Rules' panel is currently selected, showing a list of rules that can be added to the rule set.



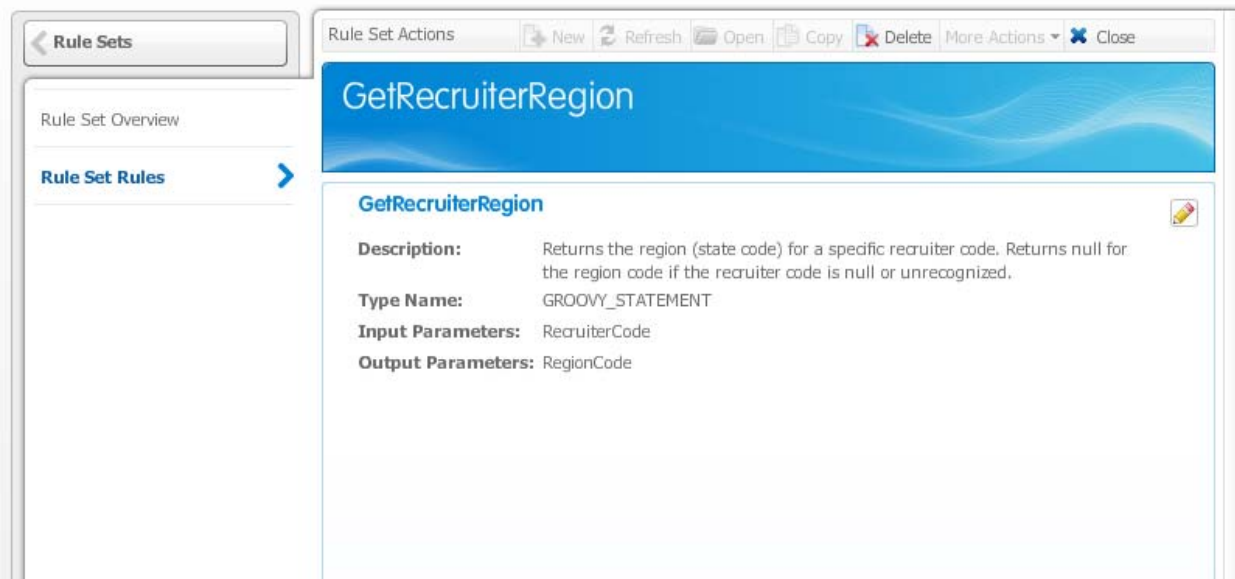
## Steps

Steps to add rules to a rule set:

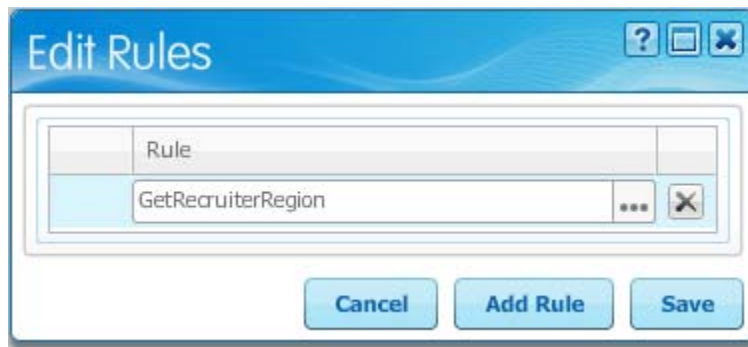
1. From the Rule Sets view, double-click a rule set to view its information.



2. Click **Rule Set Rules** to view rules associated with this rule set.

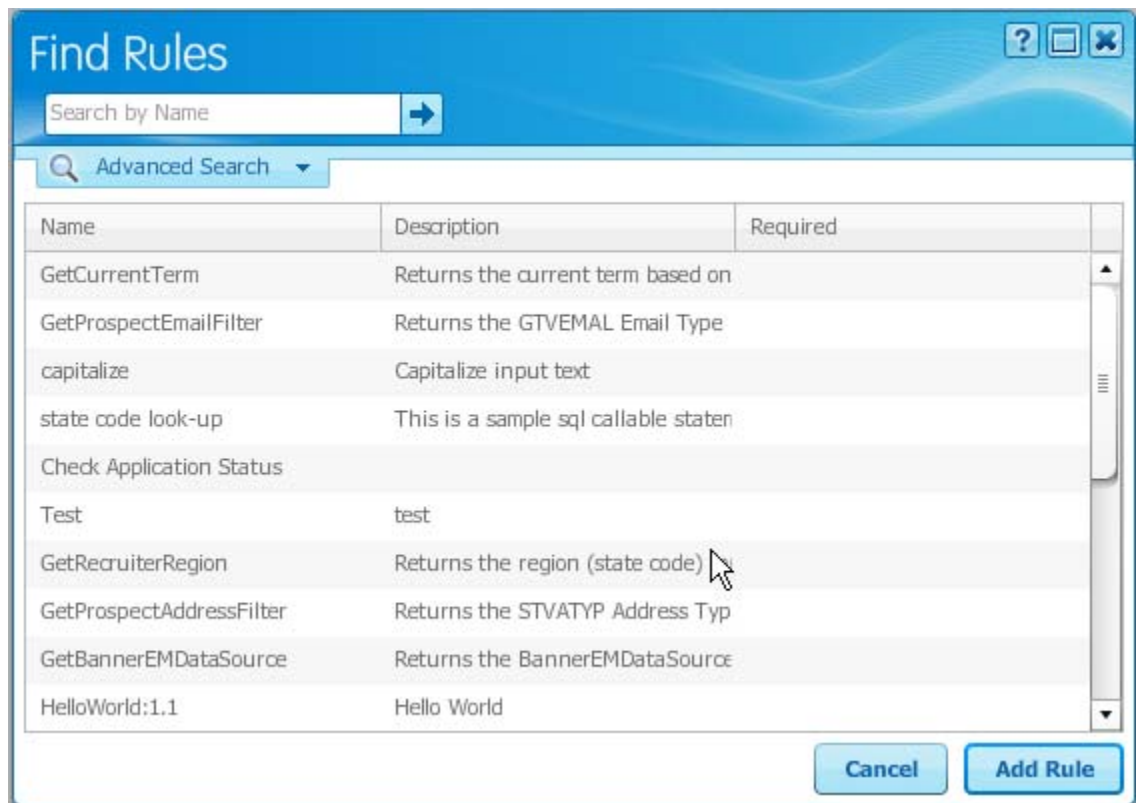


3. Click the **Edit** (✎) icon to edit the rule set's affiliated rules.



Note: To delete a rule from the rule set, click the [X] icon next to it.

- Click **Add Rule** to search for a new rule to add to the rule set.



- Select the desired rule and click **Add Rule** to add it to the rule set.
- Click **OK** to save your changes.
- Repeat the above steps until you have added all desired rules to the rule set.

## Exercise

Add multiple rules to one or more of your rule sets.

# Delete a Rule Set

---

## Introduction

Deleting a rule set can be performed on the Rule Set Actions bar.

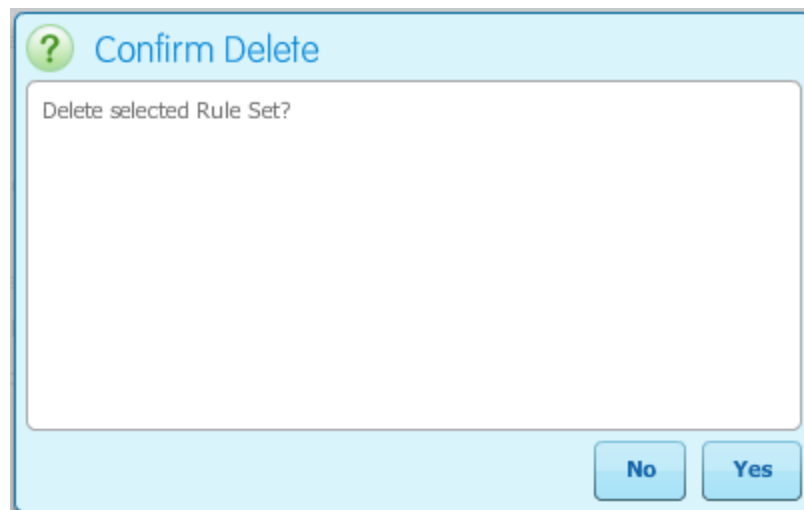
## Scenario

Having created rule sets, Robert Boyle would like to delete one of them that appears to be redundant.

## Steps

Steps to delete a rule:

1. From the Rule Sets view, double-click a rule set to view its information.
2. From the Rule Set Actions bar, click **Delete**.



3. If the rule set is not required, you will be prompted to confirm deletion. Click **Yes** to delete the rule set.

# URIs - Overview

## Introduction

Clicking **URIs** from the Business Rules view will access the URIs view.

A URI, or Universal Resource Identifier, is the unique name used to identify a rule set. You must associate each rule set with at least one URI. The URI name is the actual building block that you execute to perform the rules within the associated rule set.

## URIs view

This view displays all existing URIs. Note that the blue boxes on the right display all rules, constants and rule sets affiliated with the selected URI.

Business Rules

Rules

Constants

Rule Sets

**URIs**

Open Items

Rule URI Actions: New, Refresh, Open, Copy, Delete, More Actions, Close

### URIs (Uniform Resource Identifier)

Search by URI Name

Advanced Search

URI Name	Description	Status	Required
cd 787 test URI	defect 787 check it out	Development	No
code lookup	This is an example of execu	Development	No
com.sungardhe.banner.em	Returns the BannerEMData	Production	Yes
com.sungardhe.prospect.α	Returns the STVATYP Addr	Production	Yes
com.sungardhe.prospect.α	Returns the GTVEMAL Emal	Production	Yes
com.sungardhe.prospect.α	Returns the preferred STV1	Production	Yes
sghe.CheckApplicationExist		Production	No
sghe.CheckApplicationStatu		Production	No
sghe:capitalize	Capitalize input text	Production	No
sghe:fico-test	Indicates whether someone	Development	No
sghe:Formal-HelloWorld	Hello World	Test	No
<b>sghe:GetCurrentTerm</b>	Returns the current term b	Production	Yes
sghe:GetRecruiterRegion	Returns the region (state α	Production	Yes
sghe:HelloWorld	Hello World	Production	Yes
sghe:ValueOfPi	The value of pi as obtained	Production	Yes
welcome message uri	This is an example of rule c	Development	No

Rule Sets

Rules

Constants

# Creating a New URI

## Introduction

URIs are created on the URIs View.

## Scenario

Having created rules, constants and rule sets, Robert Boyle would like to create some URIs with which to tie the whole business rule package together.

## URIs View

The screenshot displays the 'URIs (Uniform Resource Identifier)' view within a business rules administration application. The main window has a title bar with 'Rule URI Actions' and buttons for New, Refresh, Open, Copy, Delete, More Actions, and Close. Below the title bar is a search bar with 'Search by URI Name' and an 'Advanced Search' button. The central area contains a table of URIs.

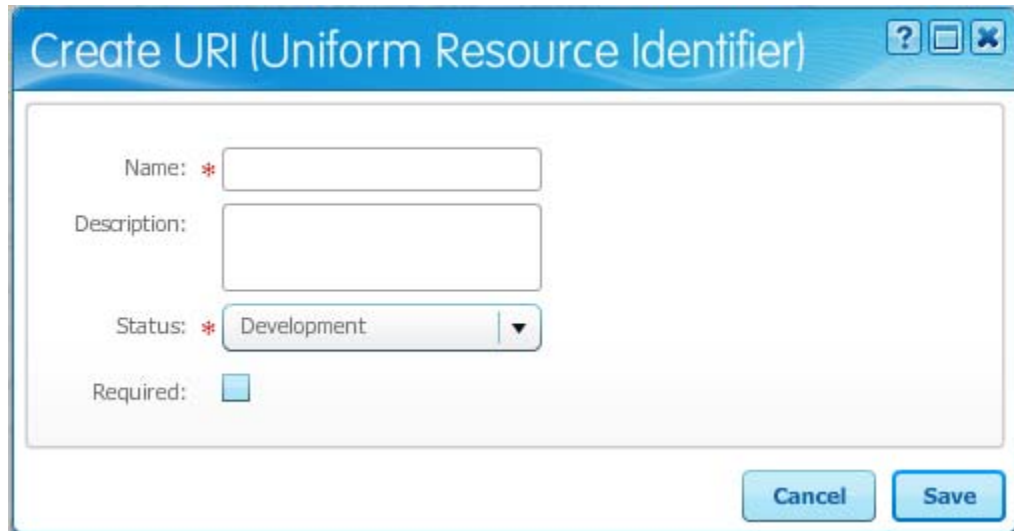
URI Name	Description	Status	Required
cd 787 test URI	defect 787 check it out	Development	No
code lookup	This is an example of execu	Development	No
com.sungardhe.banner.em	Returns the BannerEMData	Production	Yes
com.sungardhe.prospect.α	Returns the STVATYP Addr	Production	Yes
com.sungardhe.prospect.α	Returns the GTVEMAL Emal	Production	Yes
com.sungardhe.prospect.α	Returns the preferred STV1	Production	Yes
sghe.CheckApplicationExist		Production	No
sghe.CheckApplicationStatu		Production	No
sghe.capitalize	Capitalize input text	Production	No
sghe:fico-test	Indicates whether someone	Development	No
sghe:Formal-HelloWorld	Hello World	Test	No
sghe:GetCurrentTerm	Returns the current term b	Production	Yes
sghe:GetRecruiterRegion	Returns the region (state α	Production	Yes
sghe:HelloWorld	Hello World	Production	Yes
sghe:ValueOfPi	The value of pi as obtained	Production	Yes
welcome message uri	This is an example of rule c	Development	No

The left sidebar shows 'Business Rules' with a tree view containing 'Rules', 'Constants', 'Rule Sets', and 'URIs' (which is selected and highlighted with a blue arrow). The right sidebar contains three sections: 'Rule Sets', 'Rules', and 'Constants', each with a list of items.

## Steps

Steps to create a new URI:

1. From the Business Rules view, click **URIs**.
2. From the URIs view, click **New** from the URI Actions Bar.



The image shows a 'Create URI (Uniform Resource Identifier)' dialog box. It has a title bar with a question mark, maximize, and close button. The main area contains four fields: 'Name' with a red asterisk, 'Description', 'Status' with a red asterisk and a dropdown menu showing 'Development', and 'Required' with an unchecked checkbox. At the bottom right are 'Cancel' and 'Save' buttons.

3. Enter a **Name**, **Description** and **Status** in their respective fields for the new URI.
4. Click the **Required** check box if the URI is to be considered required.
5. Click **OK** to save your new URI.

## Exercise

Create one or more URIs in the system.



# Editing an Existing URI's Attributes

## Introduction

Once a URI has been created, an administrator can edit its attributes. Note that this is different from

## Scenario

Robert Boyle has created a URI which he now wishes to modify to make corrections.

## URIs view

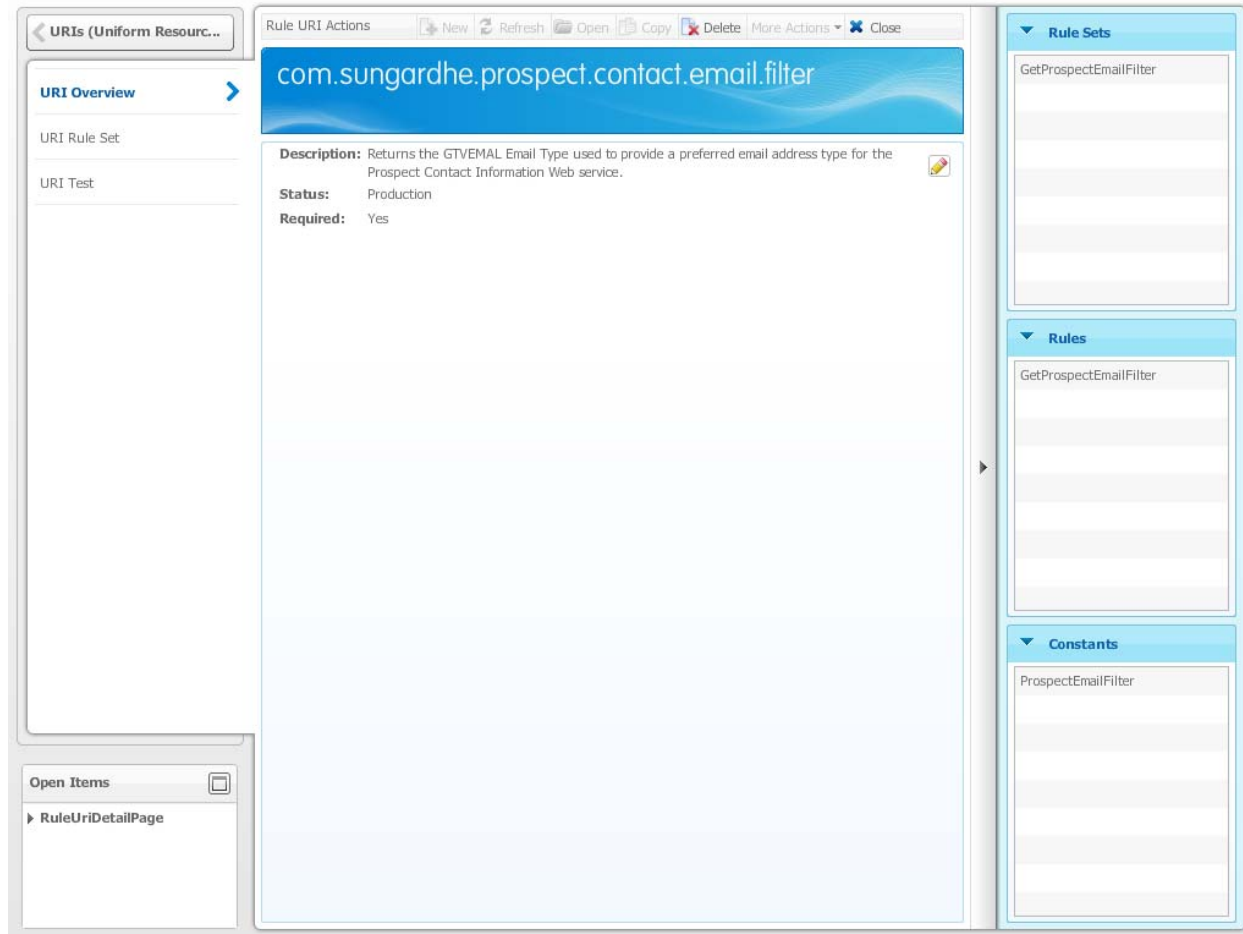
The screenshot shows the Business Rules Administration (BRA) interface. The main pane is titled 'URIs (Uniform Resource Identifier)' and contains a table of URIs. The table has four columns: URI Name, Description, Status, and Required. The row 'sghe:GetCurrentTerm' is highlighted. The left pane shows the 'Business Rules' sidebar with 'URIs' selected. The right pane shows 'Rule Sets', 'Rules', and 'Constants' sections.

URI Name	Description	Status	Required
cd 787 test URI	defect 787 check it out	Development	No
code lookup	This is an example of execu	Development	No
com.sungardhe.banner.em	Returns the BannerEMData	Production	Yes
com.sungardhe.prospect.α	Returns the STVATYP Addr	Production	Yes
com.sungardhe.prospect.α	Returns the GTVEMAL Emal	Production	Yes
com.sungardhe.prospect.α	Returns the preferred STV1	Production	Yes
sghe.CheckApplicationExist		Production	No
sghe.CheckApplicationStatu		Production	No
sghe.capitalize	Capitalize input text	Production	No
sghe:fico-test	Indicates whether someone	Development	No
sghe:Formal-HelloWorld	Hello World	Test	No
sghe:GetCurrentTerm	Returns the current term b	Production	Yes
sghe:GetRecruiterRegion	Returns the region (state α	Production	Yes
sghe:HelloWorld	Hello World	Production	Yes
sghe:ValueOfPi	The value of pi as obtained	Production	Yes
welcome message uri	This is an example of rule c	Development	No

## Steps

Steps to edit an existing URI:

1. From the URIs View, double-click a URI to view its information.



2. Click the **Edit** (✎) icon to edit the URI's attributes.

**Edit URI (Uniform Resource Identifier)**

Name: \* com.sungardhe.prospect.contact.email.filter

Description: Returns the GTVEMAL Email Type used to provide a

Status: \* Production

Required: ☒

Cancel Save

3. Modify the fields as desired.
4. Click **OK** to save your changes.

## Exercise

Modify the attributes of one of the URIs created in a previous exercise.

# Add a Rule Set to a URI

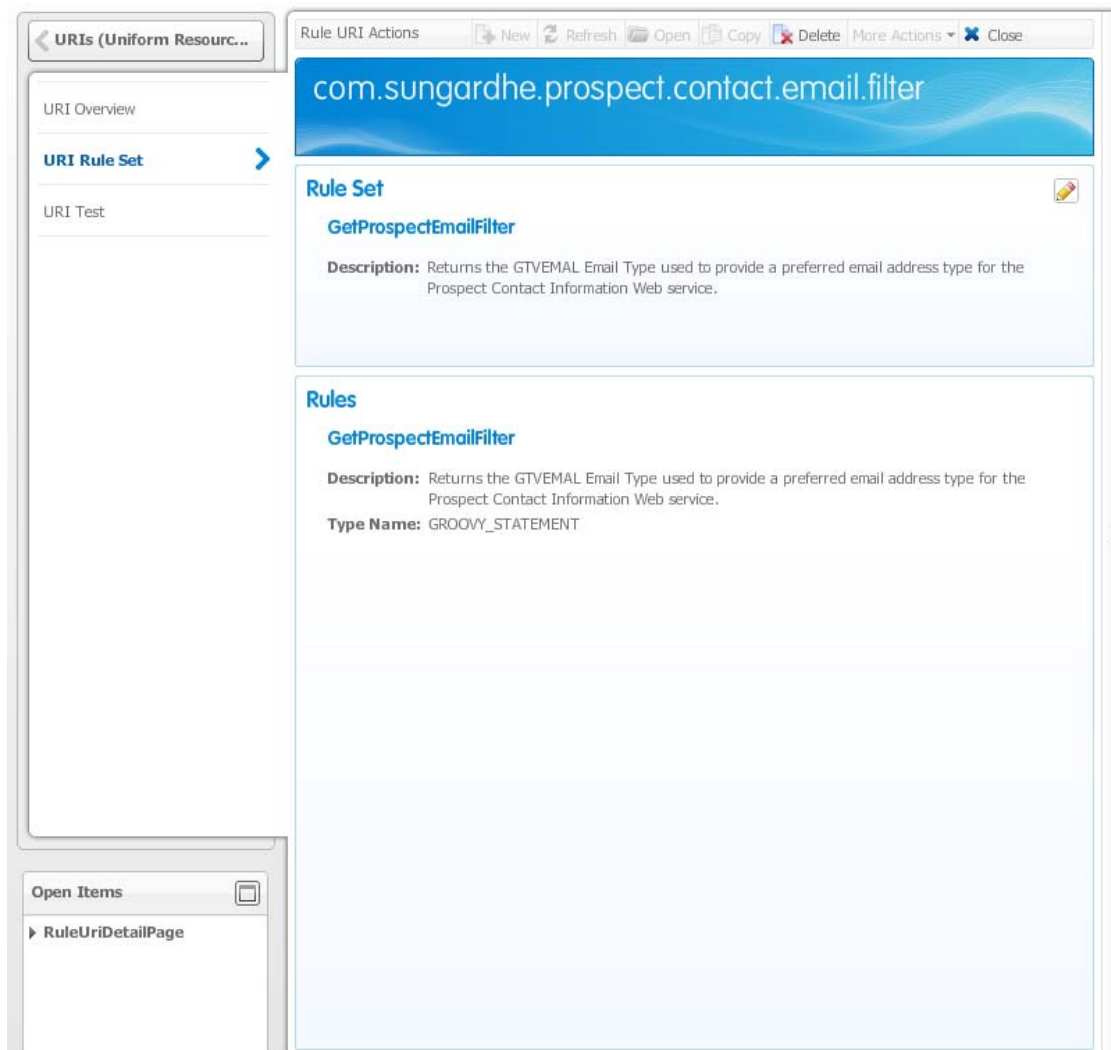
## Introduction

Each rule set must be associated with at least one URI.

## Scenario

Having created a URI, Robert Boyle would now like to associate one of his rule sets with it.

## URI Rule Set view



## Steps

Steps to associate a rule set with a URI:

1. From the URIs View, double-click a URI to view its information.
2. Click **URI Rule Set** to access the URI Rule Set view.
3. Click the **Edit** (✎) icon to view available rule sets. If an existing rule set is associated with the URI, the Edit icon will allow you to modify this. If there is no rule set available (such as when creating a new URI), you may either click the Edit icon or click **Add Rule Set to this URI**.



4. Select a rule set, using the Search box as necessary to locate a specific rule set, and click **Add** to add it to the URI.

## Exercise

Add a rule set to one or more of the URIs that you created.

# Test Parameters of a URI

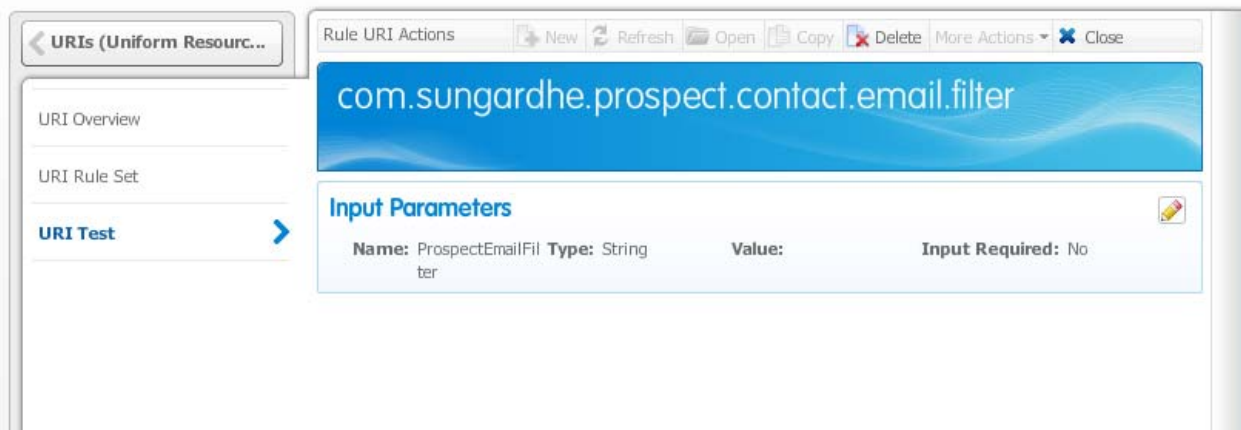
## Introduction

With a rule set associated with a URI, you may test the input parameters.

## Scenario

Robert Boyle wishes to test the URI to which he has just added a rule set.

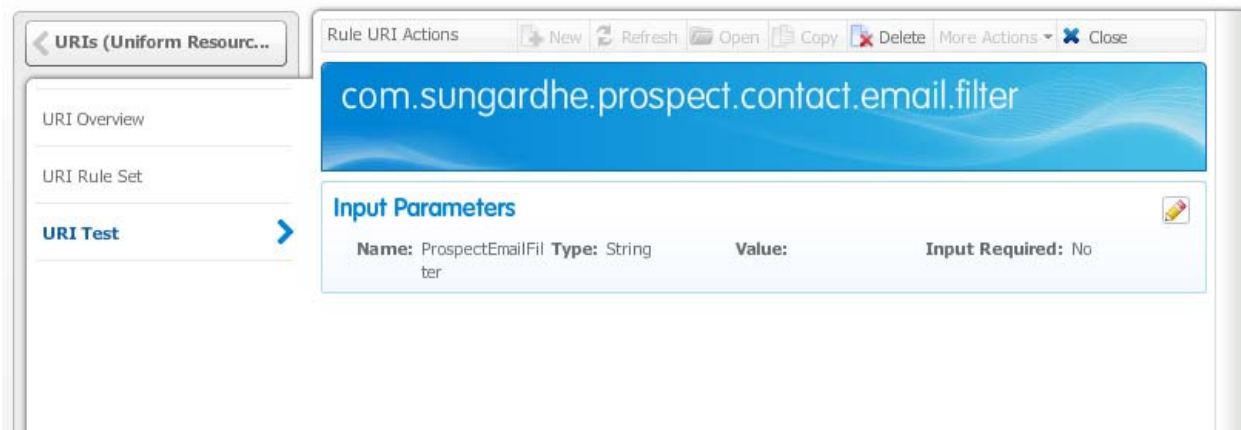
## URI Test view



## Steps

Steps to test the parameters of a URI:

1. From the URIs View, double-click the desired URI to view its information.
2. Click **URI Test** to view the input parameters for this URI.



3. Click the Edit (✎) icon to view the parameters of this URI in more detail.



4. Note that you can click on a parameter to enter an Input Value for that parameter. Enter a value in the **Input Value** field and click **Complete** to add the value to the parameter.

Parameter Name	Type	Input Value
ProspectEmailFilter	String	

ProspectEmailFilter

Input Value: \*

Complete Cancel

Cancel OK

5. Click **OK** to accept changes to the input parameters.
6. Click **Test** to generate output parameters.

URI Test

Rule URI Actions

com.sungardhe.prospect.contact.email.filter

**Input Parameters**

Name	Type	Value	Input Required
ProspectEmailFilter	String		No

**Output Parameters**

Name	Type	Value	Output Guaranteed
EmailFilter	String	PERM	Yes

7. Click **Reset** to return the URI to its original state (i.e. just Input Parameters).

## Exercise

Add input values to the parameters of one of your created URIs and test them.