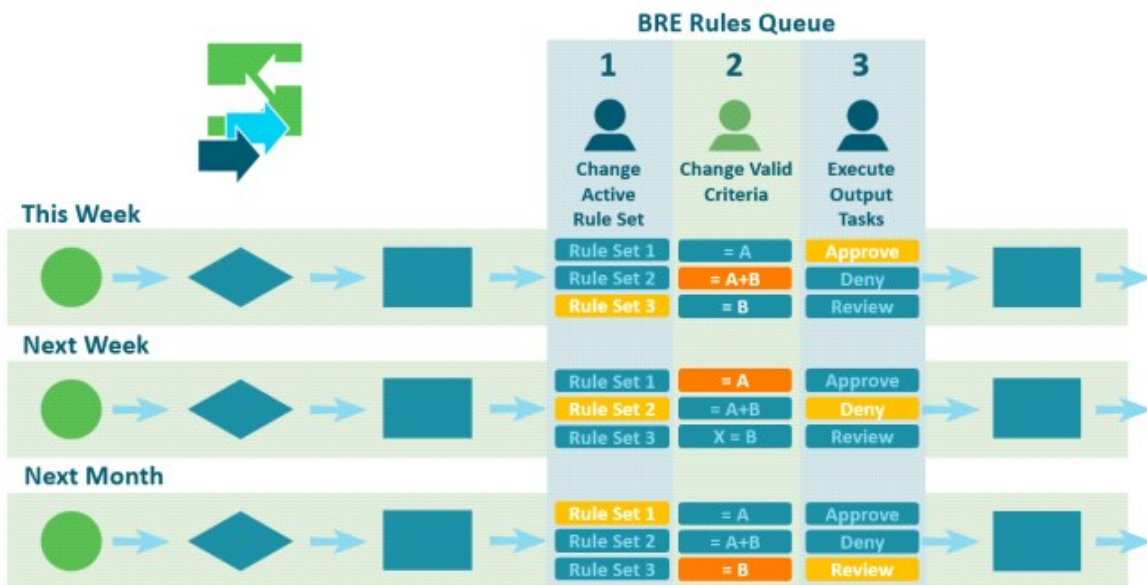# ONBASE

BUSINESS RULES ENGINE

SUMMARY

The OnBase Business Rules Engine (BRE) for Workflow allows organizations to quickly react to ever-changing business conditions. Decision makers can immediately alter production Workflow to comply with changes in organizational policies that govern business processes. This ability to make "on the fly" changes to production Workflow logic—without latency or reliance on IT resources—results in process agility, while still meeting business control and transparency requirements.

BENEFITS

- **Transfers control of business rules management** from IT System Administrators to Business Process Owners.
- **Improves Workflow flexibility** to quickly respond to ever-changing business conditions (such as regulatory changes, market opportunities, competitive threats, and economic or demographic changes).
- **Increases speed of implementing changes** in workflows to capitalize on opportunities that increase revenue or profit.
- **Minimizes Workflow maintenance** by reducing custom development, configuration changes and associated costs.

DESIGN

From within the OnBase Client interface, BRE Rules Queues allow business users to make controlled, in-flight changes to Workflow processes, reacting in real-time to dynamic business conditions.

1. Business Process Owners with assigned privileges change the active policies (Rule Sets) that govern a business process.
2. Managers with assigned privileges change the valid criteria (Parameters) required, selecting a value or range of values.
3. Business Process Owners can select from preconfigured Output Task Lists for OnBase to execute based on rule results.
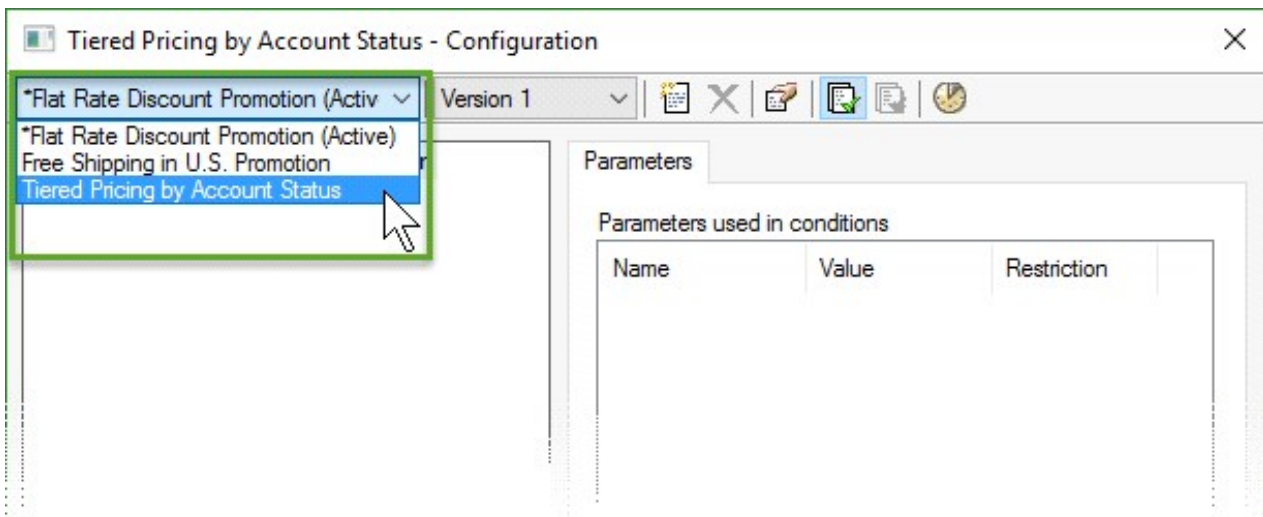
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APPLICATIONS

- **Complex Processes:** Typical insurance companies have complex policy renewal processes that route policies based on numerous, frequently changing conditions. The Business Rules Engine provides native capabilities to efficiently manage and modify complex and changing business rules, eliminating custom solutions that require extensive development time and ongoing maintenance.
- **Risk Management:** The Business Rules Engine allows organizations to create several alternative business rules that can be easily applied in response to contingencies such as process exceptions, acts of nature, or other unexpected events.
- **Dynamic Environments:** The Business Rules Engine enables organizations to quickly modify business processes that need to change in response to environmental variables. A financial institution can use the Business Rules Engine to allow regional managers to adjust threshold values used to accept credit applications to help them comply with organizational policies.
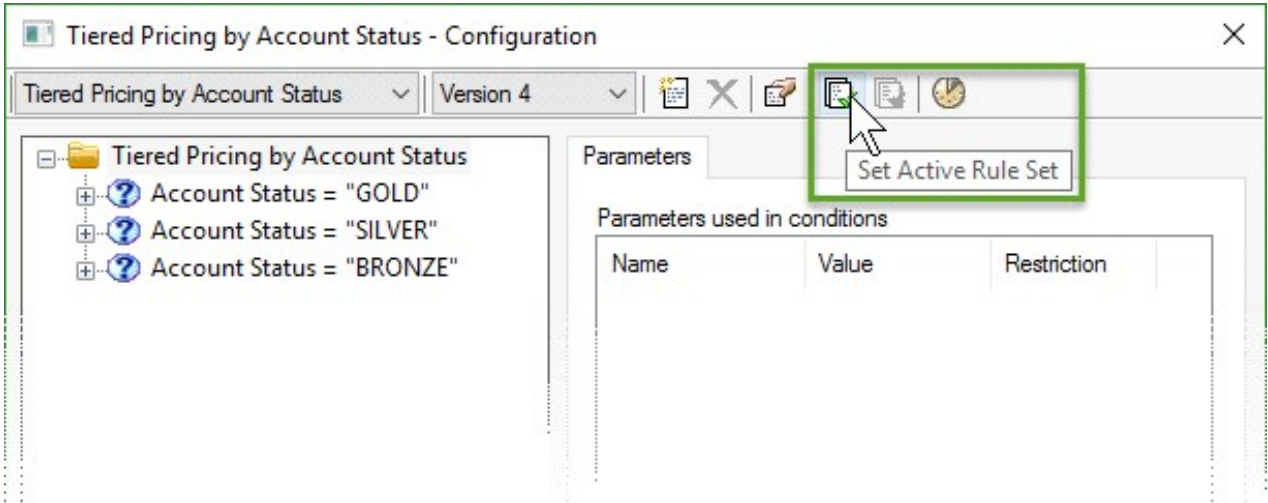
KEY FEATURES

- **Activate feature** allows changes to rules take effect immediately, without requiring Client restarts.
- **Publishing and Automatic Versioning** allow users to safely control modifications and testing of Rule Sets before making them available system wide, while also providing the ability to revert back to previous versions of Rule Sets.
- **History** feature provides complete, auditable and searchable logging of all Rule Set modifications and activity.
- **Operators and functions** allow data values to be calculated or converted for analysis and evaluation with no custom scripting.
- **Advanced data gathering methods** support use of VB Scripts, Unity Scripts, Workflow Properties, Web Service Calls using MS SOAP Toolkit, and SQL Statements to query OnBase and third-party systems.
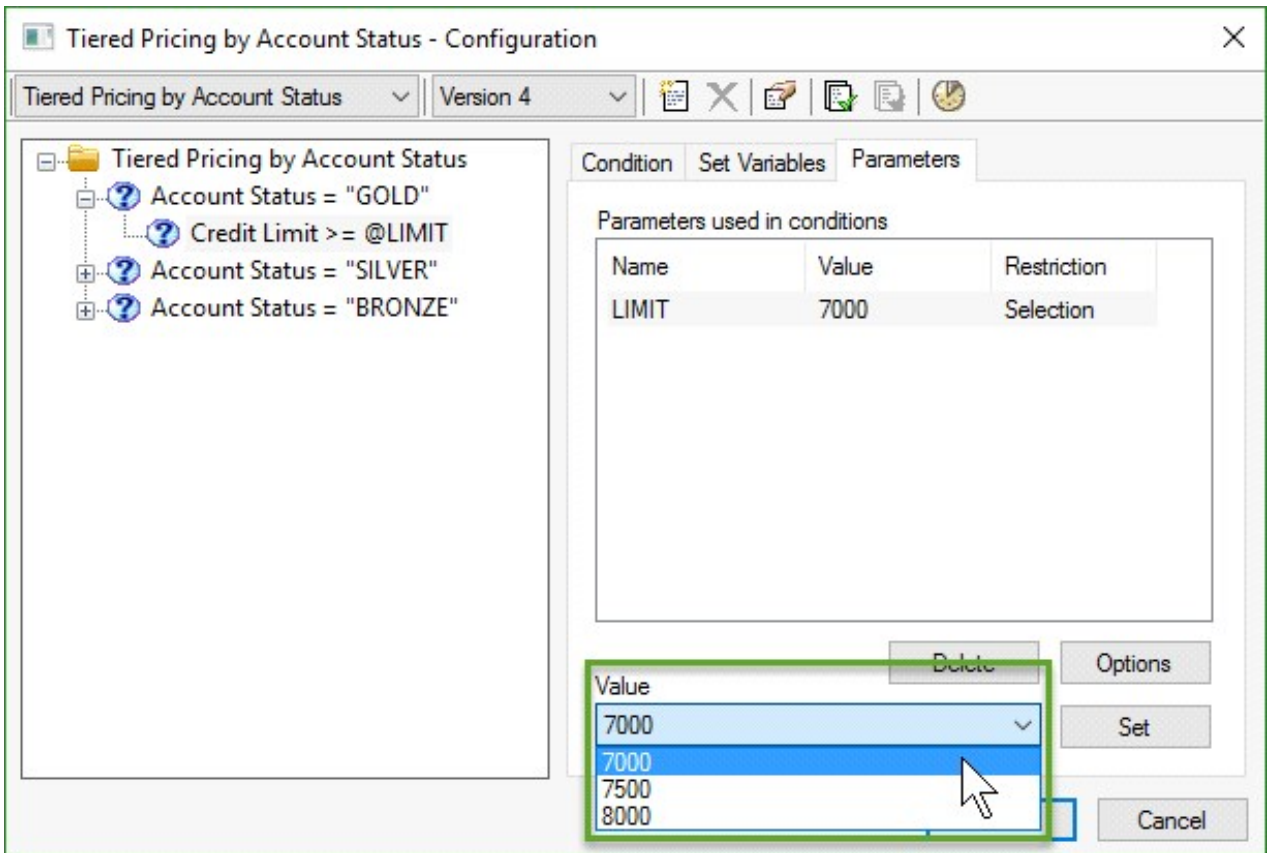
INTERFACE

Drop-down selection of current Rule Set to make modifications.

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Single-click activation of currently selected Rule Set.

Drop-downs are just one of the options available to easily control current Parameter (criteria) settings.

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