Breeze Projects Conditional Properties

User Guide

February 2019

Overview

The Breeze Form Manager feature, enables Site Administrators to setup a series of rules to manage the default data and visibility of specific Project properties.

The Breeze Form Manager feature can be enabled on a Breeze Project form and configured with rules to automatically hide or show a series of other project properties on the same form based on data selections in specific controls. Once activated the feature is available on all project types and is not project type specific.

The feature configuration is based on a source field control that determines the behavior of target field controls. This means, a user can set one or more rules against a single source control on the project form and this will enable multiple actions to happen when a single target field control on the same project form is changed.

Form Manager Components

The purpose of the form manager is to control the behavior of project form field controls and data within fields on the form based on one or more rules.

The form manager therefore includes the following facets;

1. **Trigger** – the user identifies the form manager rule trigger. The trigger can be a field on a Breeze Project or it can be the New Project Form load event.
   Field as trigger means one field that exists on the project form will be evaluated when data is changed and based on the change (new value), the configured logic will be used to determine whether the values in one or more target fields will be changed, or whether one or more target fields will be hidden or shown.
   Supported trigger field types are Choice fields and Lookup fields.

2. **Evaluation** – the evaluation contains the logic that will be evaluated against the data in the trigger. If the result of the evaluation is true, the form manager action will execute.

3. **Action** – the form manager will execute the defined action if the outcome of the evaluation is true. Actions include hiding or showing of target fields or setting a data value in the target field.

4. **Target** – the selected target field is Breeze Project field. The form manager action will execute against the target field. This field may be hidden or shown or the data within this field will be manipulated based on the configured action.
   Target fields include text fields, choice fields and lookup fields.

   *The form manager will not hide mandatory fields.

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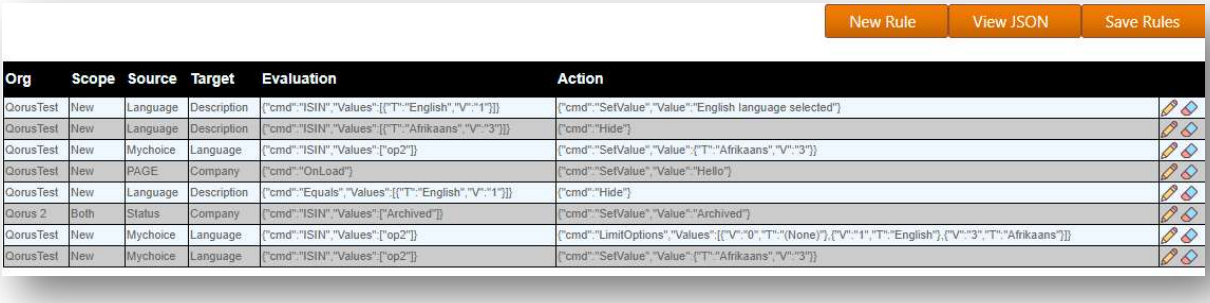
Configure Rules

Only SharePoint Site Administrators have access to configure and manage Form Manager rules.

The form manager configuration page can be access by navigating to the site URL/_layouts/qorus.breeze.customfields/fmconfig.html
Example, if the Breeze site URL is https://northwind.breeze.com the form manager configuration page URL would be
https://northwind.breeze.com/_layouts/qorus.breeze.customfields/fmconfig.html

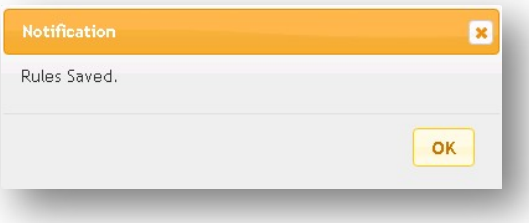
Users are required to authenticate with Breeze prior to loading this interface. Failure to do so will result in an error message to log into breeze and all buttons disabled on the interface.

The form manager configuration page will list the configured rules of all the Breeze Site Organizations.



Org	Scope	Source	Target	Evaluation	Action
QorusTest	New	Language	Description	{"cmd":"ISIN","Values":[{"T":"English","V":"1"}]}	{"cmd":"SetValue","Value":"English language selected"}
QorusTest	New	Language	Description	{"cmd":"ISIN","Values":[{"T":"Afrikaans","V":"3"}]}	{"cmd":"Hide"}
QorusTest	New	Mychoice	Language	{"cmd":"ISIN","Values":["op2"]}	{"cmd":"SetValue","Value":{"T":"Afrikaans","V":"3"}}
QorusTest	New	PAGE	Company	{"cmd":"OnLoad"}	{"cmd":"SetValue","Value":"Hello"}
QorusTest	New	Language	Description	{"cmd":"Equals","Values":[{"T":"English","V":"1"}]}	{"cmd":"Hide"}
Qorus 2	Both	Status	Company	{"cmd":"ISIN","Values":["Archived"]}	{"cmd":"SetValue","Value":"Archived"}
QorusTest	New	Mychoice	Language	{"cmd":"ISIN","Values":["op2"]}	{"cmd":"LimitOptions","Values":[{"V":"0","T":"(None)"},{"V":"1","T":"English"},{"V":"3","T":"Afrikaans"}]}
QorusTest	New	Mychoice	Language	{"cmd":"ISIN","Values":["op2"]}	{"cmd":"SetValue","Value":{"T":"Afrikaans","V":"3"}}

Each rule has an edit and delete icon on the right-hand side of the rule.
Clicking on these icons will allow for editing or deletion of the rule they are bound to.
Deleting a rule will raise a confirmation dialog to stop accidental deletes of a rule.
Rules are not saved on a per change basis and requires the user to save at their discretion using the save button.



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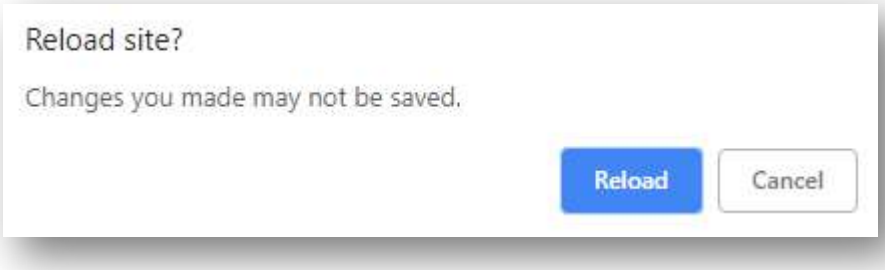
If you try to leave the page before saving any unsaved changes you will be prompted to declare it is your intention to leave without saving by the following dialog (differs from browser to browser)



The above is triggered when unsaved data exists, and you try to leave the page via close tab or reload page. Clicking cancel will give you a chance to save your data.

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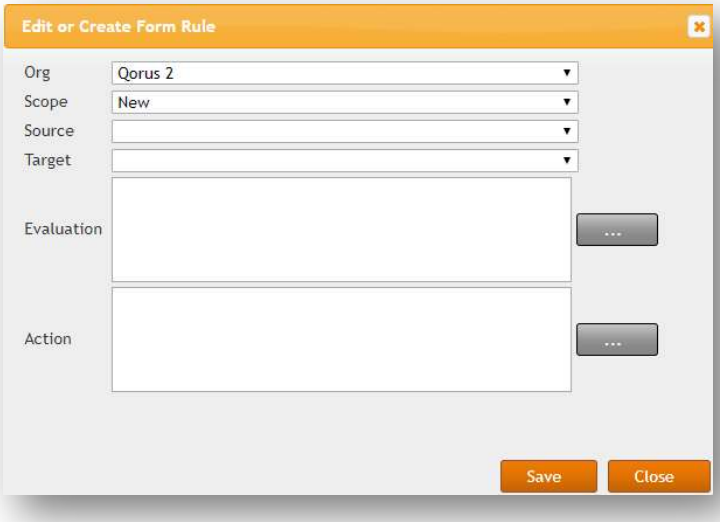
Create a new Rule

To create a new rule, click on the 'New Rule' button to launch the 'New Rule' dialog.



The user must configure the following fields and click on Save and Close to apply changes.

The following table describes all elements of rule configuration:

Field	Description	Configuration Example
Org	The Org within the Breeze site on which the Breeze Project resides.	The Org name.
Scope	This defines the pages that the rules can run under. The options are as follows: • New – Only run when projects are created. • Edit – Only run when a project's properties are edited. • Both – Run on both the above.	Edit
Source	The source field on the Breeze project which will trigger the rule. Only choice fields and lookup fields are listed. The PAGE can also be selected as the source, meaning when the new Project page loads, the action will execute against the specified target. The PAGE rule only applies when the new project form loads and not if the edit project form loads. There is no evaluation logic against the PAGE source.	Region, Industry
Target	The target field on the Breeze project on which the rule will be enforced. Text fields, note fields, choice fields and lookup fields are supported.	Project Description, Country
Evaluation	The evaluation contains the logic which will be used during rule evaluation. Some evaluations like "ISIN" can have multiple values and holding in the Ctrl key while clicking on the values will allow you to select multiple values.	ISIN 'RFP Project' ; 'Quick Proposal'

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	Evaluations include: ISIN – any part of the value text in the source control matches the selected evaluation value. NOTIN = no part of the value text in the source control matches the selected evaluation value. EQUAL – the value text in the source control is an exact match of the selected evaluation value. NOTEQUAL – the value text in the source control is not an exact match of the selected evaluation value.	
Action	The action determines the effect on the target field. Actions include: Hide – hide the target field control from the form. Show – show the target field control on the form. Set Value – set a value in the target field control. LimitOptions - limits the choices to a subset of the values available. For example, if a user selects a country from the source dropdown then this action will filter the options in the target dropdown to reflect options that pertain to the source dropdown. The editor will automatically add the (None) option for dropdowns that do not have a required value. *If the target field is a required field type it cannot be hidden. **Filter Choices – filter the choice items to a predetermined list of values.**	Show
Scope	This setting determines whether the rule applies to the project properties form that is displayed when a new project is created (New Project form) or the project properties form that is displayed when an existing project is edited (Edit Project form) or both. If the scope is set to New Project Form, the rule will only apply to the Breeze Project – New Item form. If the scope is set to Edit Project Form, the rule will only apply to the Breeze Project – Edit Item form. If the scope is set to Both Forms, the rule will apply to both the Breeze Project – New Item form as well as the Breeze Project – Edit Item form.	New Project Properties

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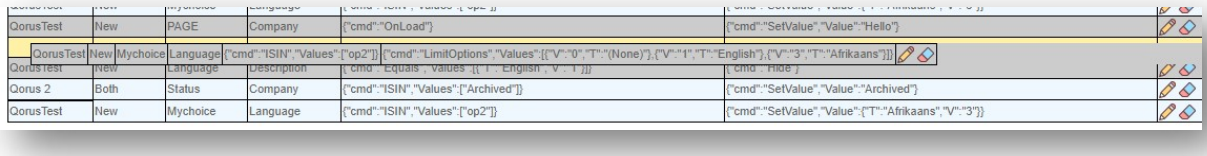
Rule Execution

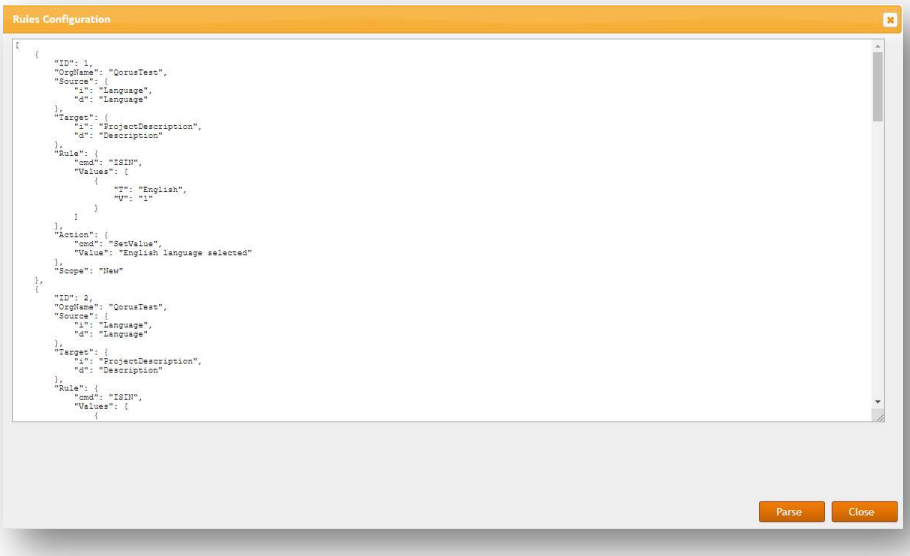
Rules are run in a sequential order from top to bottom.
To re-arrange rules and their intended execution order the rules can be dragged and dropped into the correct order.



Long click the left mouse button and drag a rule to the new position and leave the mouse button to drop the rule in its new position.

View JSON

The JSON editor is launched from the 'View JSON' button.



The form allows a user to adjust the configuration or copy and paste rules into the configuration.
The user can merge changes into the configuration by clicking on the parse button.
To save changes the user needs to client on the 'Save' button next to the 'View JSON' button.

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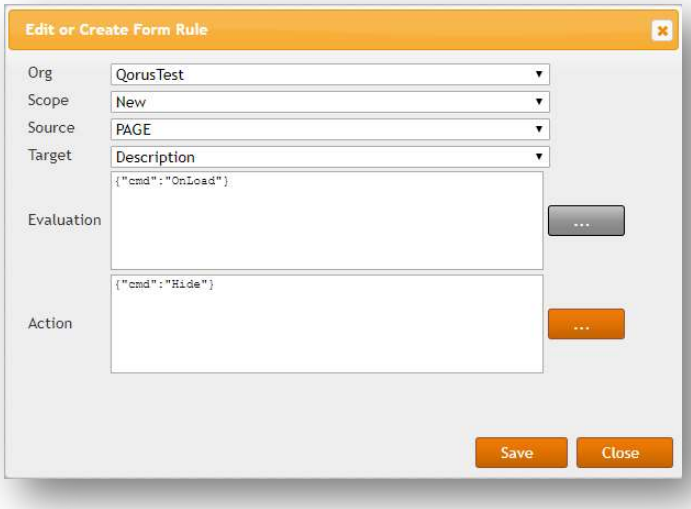
Examples

This section contains examples of typical usage.

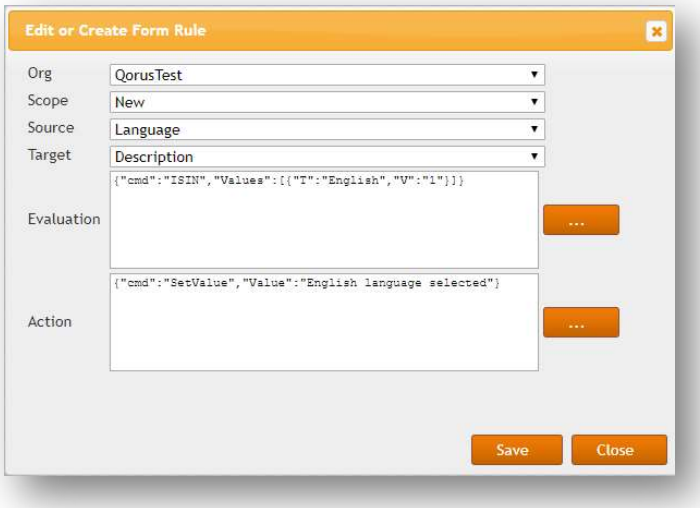
Example 1:

The Description field is hidden when the new projects form is loaded.
Note the evaluation button is disabled for Page events.



Example 2:

The rule fires when language is set to English.
It then changes the value of the Description field to read “English language selected.”



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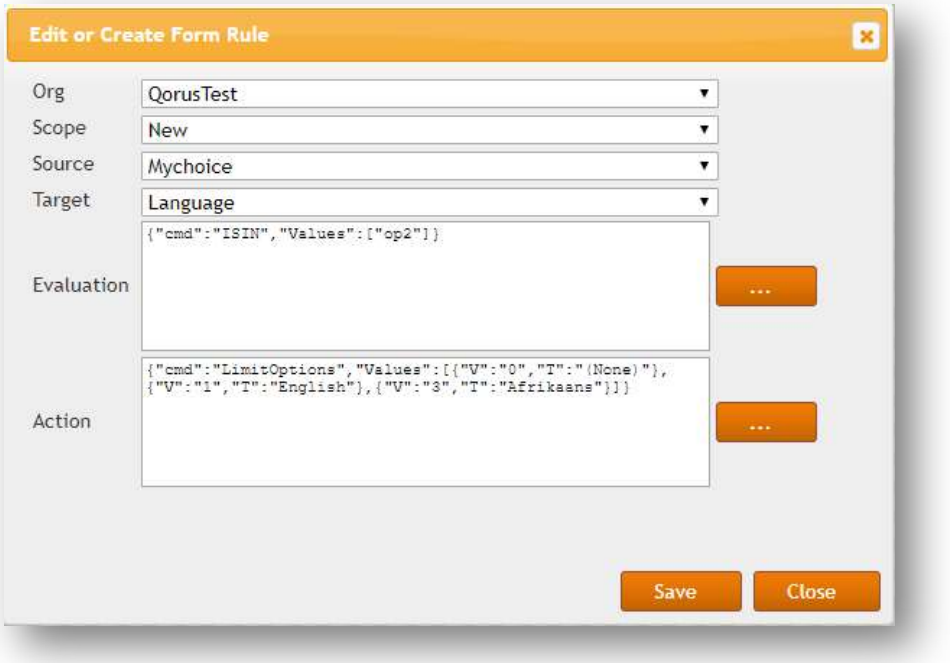
Example 3:

When the Mychoice drop down is set to the value “op2”, the Language drop down will be limited to English and Afrikaans.

Because there is no default, the first option which is (None) becomes the default.

If you want a default add another rule and ensure it runs after the LimitOptions rule.



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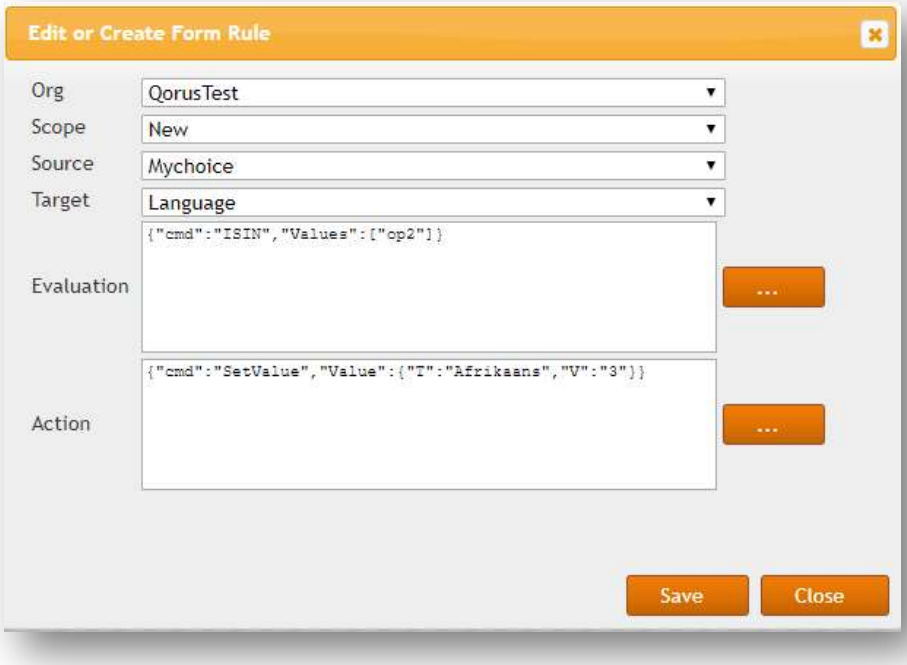
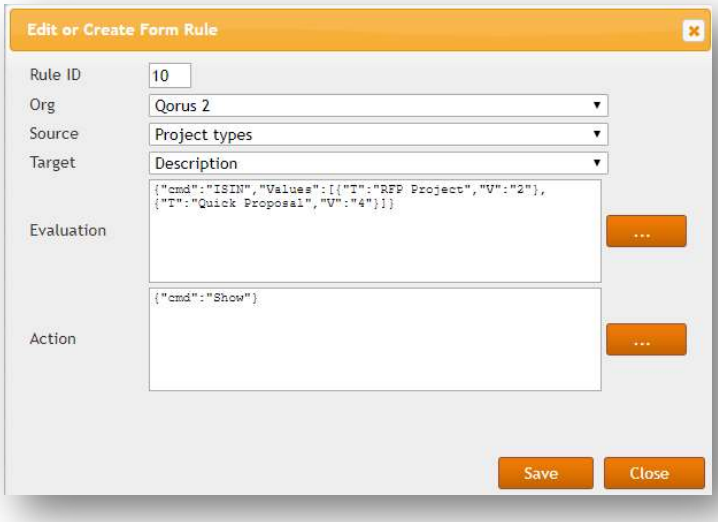
Example 4:

This rule will set the Language to Afrikaans in the language field when Mychoice is set to “op2”.



Example 5:

In this example, the Breeze Project on the Qorus 2 org will show the ‘Description’ field when the Breeze Project ‘Project Types’ field is set to ‘RFP Project’ or ‘Quick Proposal’.



In the following illustration, the ‘Project types’ field value is not set and the ‘Description’ field is hidden.

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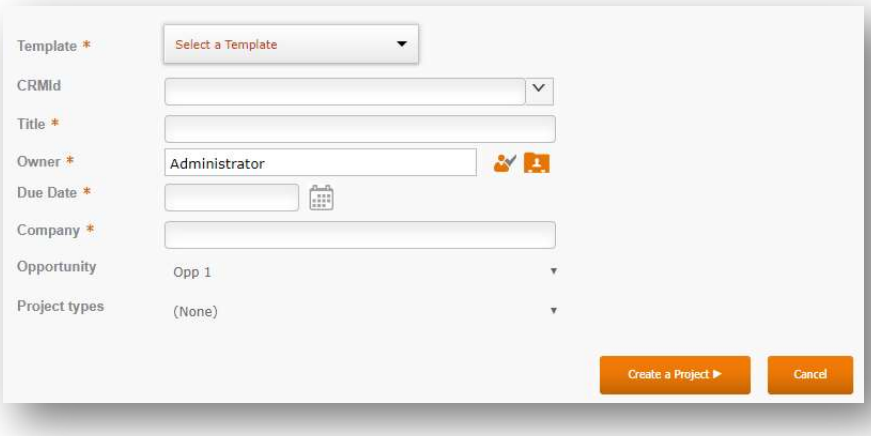
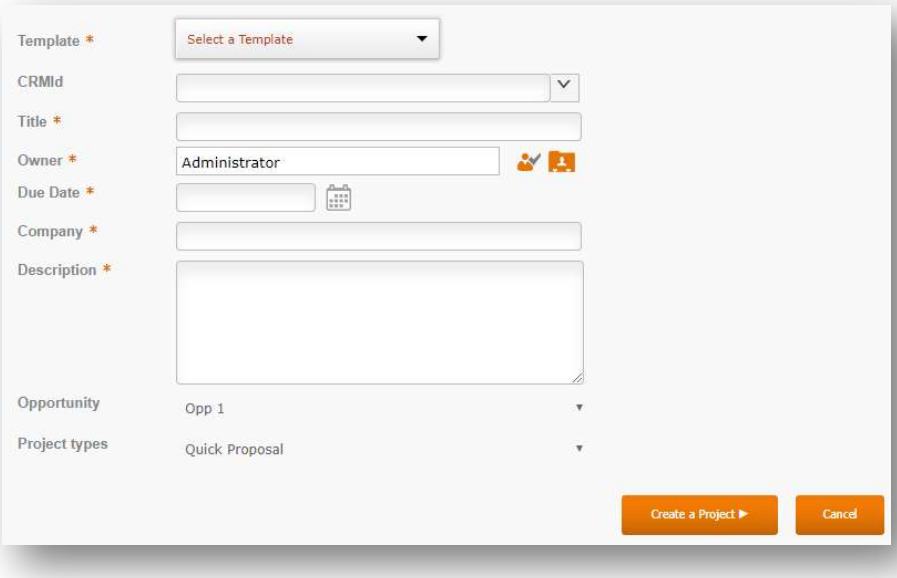


If the user set the value of 'Project types' to 'Quick Proposal', the 'Description' field is shown.



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