Advanced rule configuration

Advanced rule configuration · https://extensionkit.unitfly.com/documentation/document-ai-advanced-rule-configuration-page/

Upon switching to advanced configuration mode within the rule configuration, additional options become available:

- Alias
- Vault search
- Vault search sort
- Set properties on
- Update metadata in file
- Search timeout (sec)
- Execution mode
- Error handling behavior
- Save error to property
- Business critical

Below are the descriptions of each advanced property.

Alias

Assign a unique rule alias for easy identification.

Vault search

These optional vault search filters are used to find another object in the vault to use as a source in this rule instead of a trigger source object. When the rule is not orchestrated, these conditions must be satisfied for the rule to be executed. Multiple search filters are combined with the OR operator (at least one must be satisfied). Multiple search conditions within a single search filter are combined with the AND operator (all must be satisfied).

1. Expand **Vault search.**
2. Click on **Add search.**
3. Expand **Search [1].**

Status field conditions and **Property conditions** become available.

Status field conditions

Vault Search > Search > Status field conditions

Search status field conditions.

1. Expand **Status field conditions**.
2. Click on **Add Status field condition.**
3. Expand **Status field condition [1]**.

Additional fields open up: **Field** and **Value type**.

Field

Vault Search > Search > Status field conditions > Field

Defines the status field as an additional search condition. Choose one of the following:

- **ID:** This option refers to the Object ID.

- **ExternalID:** This option refers to the Object ID from an external system.
- **Type:** This option refers to the Object Type.
- **Version:** This option refers to the object’s version.
- **Deleted:** If set to True, it refers to objects that have been deleted but not destroyed. If set to False, it refers to objects that have not been deleted.

After specifying the Field value, the **Operator** field becomes available.

Operator

Vault Search > Search > Status field conditions > Operator

The operator used for comparing actual and expected property values. Choose one of the following options to specify the condition in more detail:

- **=** (default): Checks if the property is equal to the selected value.
- **!=** : Checks if the property values are not equal.
- : Checks if the first property value is greater than the second.
- < : Checks if the first property value is less than the second.
- **>=** : Checks if the first property value is greater than or equal to the second.
- **<= :** Checks if the first property value is less than or equal to the second.

Value type

Vault Search > Search > Status field conditions > Value type

Specifies expected property value. Select one of the following options:

- **Static:** Select this option to set a static value as a status field search condition.
- **FromSource:** Select this option to set a value from the source object.
- **Dynamic:** Select this option to set a dynamic value as a status field search condition.

If Static or Dynamic value type is selected, an additional field becomes available: **Value**.

Value

Vault Search > Search > Status field conditions > Value type: Static / Dynamic > Value

Displayed only if Value type is Static or Dynamic.

Specifies the status field value expression evaluated on the source object.

Property conditions

Vault Search > Search > Property conditions

Set property conditions for finding objects using vault search. Property values can be static or dynamic.

1. Expand **Property conditions**.
2. Click on **Add Property condition.**
3. Expand **Property condition [1]**.

The following fields become available: **Property, Operator, Value** and **Mode**.

Property

Vault Search > Search > Property conditions > Property condition [1] > Property

Specifies the property whose value will be checked.

Operator

Vault Search > Search > Property conditions > Property condition [1] > Operator

Operator to use for comparing actual and expected property value. Choose one of the following options:

- **=** (default): Checks if the property is equal to the selected value.
- **!=** : Checks if the property values are not equal.
- **>** : Checks if the first property value is greater than the second.
- **<** : Checks if the first property value is less than the second.
- **>=** : Checks if the first property value is greater than or equal to the second.
- <= **:** Checks if the first property value is less than or equal to the second.
- **Contains:** Checks if the property contains the specified value.
- **Does not contain:** Checks if the property doesn’t contain the specified value.
- **Starts with:** Checks if the property’s value starts with a particular prefix.
- **Does not start with:** Checks if the property’s value doesn’t start with a particular prefix.
- **Matches regex:** Compares the property value with a regular expression pattern to check for a match.
- **One of:** Checks if the property value is one of the values specified.
- **Not one of:** Checks if the property value is not any of the values specified.
- **Is contained in:** Checks if the property value is contained within a specified list of values.
- **Is not contained in:** Checks if the property value is not contained within a specified list of values.

Mode

Vault Search > Search > Property conditions > Property condition [1] > Value > Mode

Displayed when Property is specified.

Expected property value. Can be static or dynamic, from the source object.

- **Dynamic value:** If this option is selected, the value of placeholders in the expression will be calculated from the source object.
- **Static value:** If this option is selected, the property value will be expected to match the constant value.
- **Empty value:** If this option is selected, the property value will be expected to be empty.
- **No action:** If this option is selected, no action will be performed. This is an invalid state.

Vault search sort

Sort vault search results. When an item such as Search [1] is added to a Vault search, this field becomes available.

1. Expand **Vault search sort**.

Additional fields become available: **Sort by** and **Sort direction**.

Sort by

Vault search sort > **Sort by**

Specifies the sorting criteria.

Sort direction

Vault search sort > **Sort direction**

Choose between ascending or descending order.

- **Ascending** (default)
- **Descending**

Set properties on

Specifies the object on which properties will be set. Use this setting to configure the target object for property updates performed by the Document AI rule.

Update metadata in file

This option allows you to automatically update property values in the associated document when changed. All modifications will be reflected in the preview card without the need for check-out.

- **No (default)**
- **Yes**

Execution mode

Defines when the rule is executed:

- **EventHandler**: The rule is executed during object check-in.
- **BackgroundTransaction**: The rule is executed after the object has been checked in.

Rule error handling behavior

Specifies how errors in event handlers are managed. Both will look for errors if they happen during the rule execution.

- **Stop** (default): Rollback the transaction and display an error message.

- **Continue**: Log errors and continue execution.

Save error to property

Specifies the M-Files property used to store errors that occur during rule execution.

Search timeout (sec)

Defines the search timeout in seconds, ranging from 1 to 90 seconds. This timeout applies to any search executed within the operation (e.g. any configured Vault Searches or retrieval of indirectly referenced objects). The default is 60 seconds.

Business critical

If set to true, the rule will be logged in SEQ.

- **No** (default)
- **Yes**