Study Rules

Use Study Rules to ensure consistency of trial data and to protect critical information. Study rules can be used to:

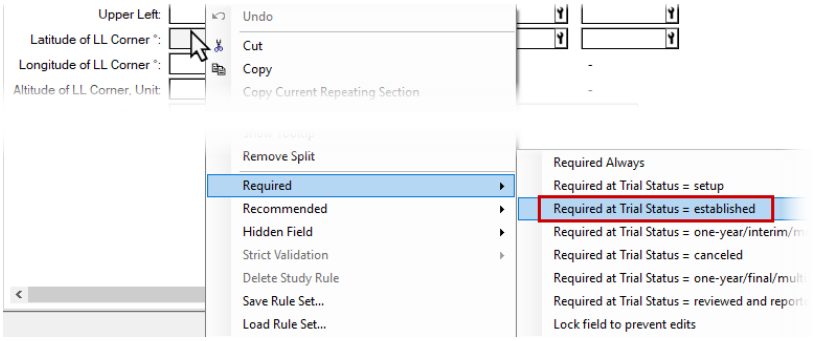
- **Communicate** to trialists the important data entry fields that should be completed.
- Define additional **requirements** for trials conducted from the protocol.
- **Restrict** trialists from changing key trial information.
- **Hide** confidential information from those who are not authorized to see it.

Open the Study Rules editor by selecting Window - Study Rules. To split the ARM window between Study Rules and another editor, select Window - Split - Horizontal, and then select Window - Study Rules.

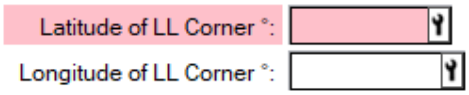
Defining study rules

The simplest way to create Header and Site Description field study rules is to open a *trial* and use the right-click menu to add rules. Then you can save the rules as a set, and load the set into protocols.

For example, to define a rule to require GPS coordinates once the trial is established:



1) **Right-click** in Latitude of LL Corner field.
2) Select **'Required'**, then choose **'Required at Trial Status = established'**. Notice that the field is now highlighted with a special background color that identifies the field as one that requires an entry.

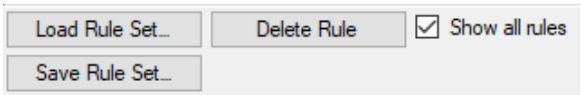


Once trial status is set to 'established', the trial will fail validation if the latitude is not entered.

Study Rules

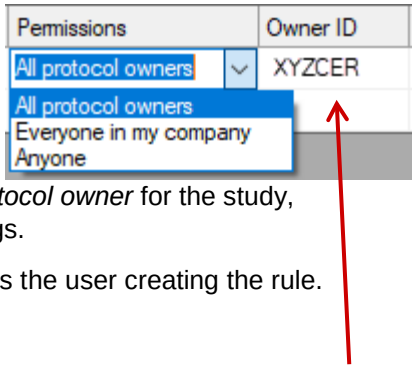
Rule	Rule ID	Editor	Field	Condition
1	Required	Site Description	General Trial - Longitude of LL Corner °	established

3) Continue adding additional Header and Site Description study rules with the right-click menu as desired.
4) When finished adding rules, open the Study Rules panel by selecting **Window - Study Rules**, and review the rules that were added.
   - The **Permissions** column defines who can edit the rule. 'Everyone in my company' is recommended to ensure flexibility within a company, without allowing a trialist to get around a rule by removing or editing it.
5) **To add new rules** here, place cursor in the last row of the Study Rules table and select a **Rule ID**. A new row is added automatically. Then fill in the rule from left to right, as the selection in one column determines what choices are available for the field to the right.
6) Select **'Save Rule Set'** button at bottom of Study Rules editor.



7) **Name** the rule set with an appropriate name for purpose of the study rules. For example, 'All efficacy trials.rls', or 'Post-emergence weed trial.rls'.
8) Create or open the protocol to load study rules into, and open the Study Rules editor.
9) Select **'Load Rule Set'**, and select the rule set saved in the previous step, such as 'All efficacy trials.rls'.
10) Continue adding additional rules as appropriate for that protocol by selecting 'Load Rule Set' button and choosing additional relevant rule sets. Loading rules is an **additive** process, so does not affect existing rules already defined in the study and does not create any duplicate or contradictory rules.
    - When defined in a protocol, study rules are carried automatically to trials created from the protocol. Study rules can also be added in a trial.

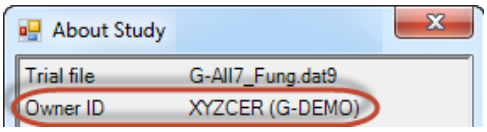
Study rule ownership



Study rules "belong" to the ARM licensee that created the rule. Only the rule owner can change or delete the study rule, unless they give other licensees permission, through the **Permissions** field:

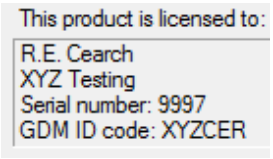
- **All protocol owners** - any ARM licensee that has been specified as a *protocol owner* for the study, defined on the 'Other protocol owners' section of the General tab in Settings.
- **Everyone in my company** - any ARM licensee from the same company as the user creating the rule.
- **Anyone** - any user can edit the current study rule.

To determine *rule ownership*, the 'Owner ID' study rule column lists the GDM ID code of the owner (ARM license).



To determine *study ownership*, select Tools - About Study. The GDM ID code of the study owner is listed as the Owner ID.

To determine the ARM license GDM ID code *of the current ARM login*, select Help - About ARM. The license information displays under 'This product is licensed to'.



Note that study rules can be added by any ARM licensee, not just the study owner, provided the new rule does not conflict with an existing rule (e.g. cannot mark a field as Recommended when there is already a rule marking the field as Required).

Common study rule examples

Below are some examples of study rules that ensure consistency of trial data and protect critical information.

Study Rules

Rule	Rule ID	Editor	Field	Condition	Columns/Trt Lines	Permissions	Owner ID
1	Required	Header	Trial ID	Lock field to prevent edits		Everyone in my company	GYELMA
2	Limit validation list	Assessment Data Header	Crop & Pest in Site Description	Always		Everyone in my company	GYELMA
3	Strict Validation	Treatments	Form Type	Always		Everyone in my company	GYELMA
4	Recommended	Assessment Data Images	Image Attachments	Every Plot	1 3-5	Everyone in my company	GYELMA
5	Hidden Field	Treatments	Registration Number	If not in my company		Everyone in my company	GYELMA
6	Required	Assessment Data	Rating Type	With assessment data	All	Everyone in my company	GYELMA
7*							

Rule 1) **Prevent** the trialist **from changing** the Trial ID defined in the protocol.

- Use 'Lock field to prevent edits' condition to protect entered information, so that it cannot be changed.

2) Ensure that every **crop** and **pest in assessment header** has been described in the trial site description.
   - In an empty row, select 'Limit validation list' as the Rule ID, and the rest of the rule auto-fills.
   - Then the only pests or crops that can be selected in assessment data are ones listed in site description.
3) Ensure the trialist selects **only information** in the associated **validation list**.
   - Useful for ensuring that a particular field is always entered consistently, which can prove to be invaluable when comparing past studies across many locations and years.
4) **Recommend** that the trialist takes **plot pictures** for key assessment columns.
   - *Recommended* means that the trial does not *fail* validation if the rule is not met, but a warning does display.
   - List specific columns or treatment lines in 'Columns/Trt Lines', or leave blank to apply the rule to all of them.
5) **Hide** confidential protocol **information** from trialists who receive the protocol.
   - The Condition field lists who will be *unable* to see the hidden content, e.g. hidden "if not in my company".
6) Require that assessment **header fields** like Rating Type be **filled** when assessment data is entered.