



# **Corticon**

## **Quick Reference**



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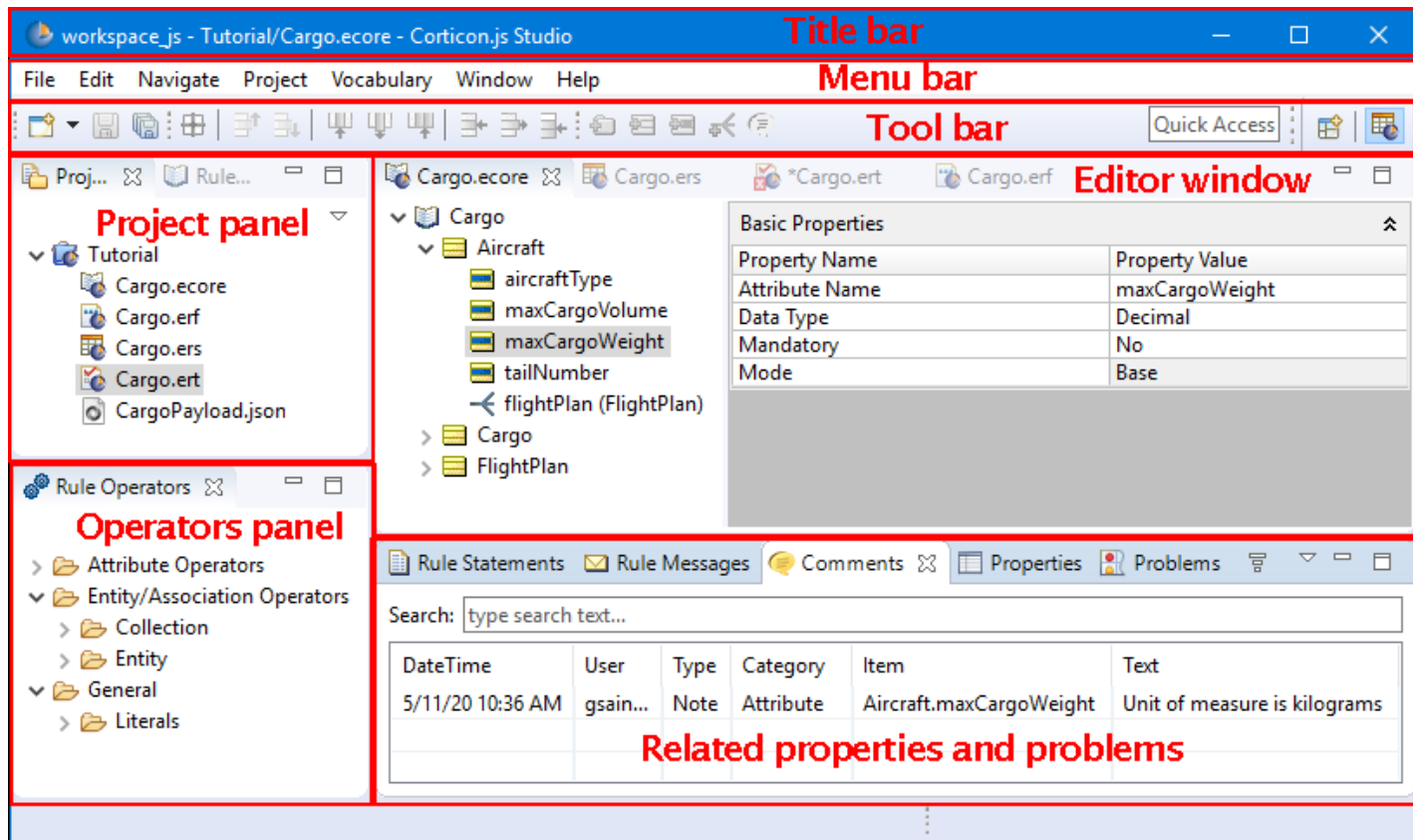
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# **A guide to Progress Corticon Studio**

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The Progress Corticon Studio is where rules are created, maintained, tested, and packaged for deployment. The Corticon Studio workbench comprises several work sections for your interactive rule development and testing.



The highlighted sections in this illustration are:

- **Title bar** - Displays the current workspace, and the active project's active file in the editor.
- **Menu bar** - Provides access to Studio commands. The active file's type adds its menu.
- **Tool bar** - Provides access to most Studio commands. The active file's type adds its bar to the toolset.
- **Project panel** - Lists all the projects that are in the workspace. Expanding a project opens its folders and lists its files.
- **Editor window** - Enables the editing functions for the file's type. When other files open in the editor window, they all are available but only one is active.
- **Operators panel** - Provides hints to the rule language syntax and usage and also lets you drag and drop selected operators into rules.
- **Additional info on active window** - Comments and added information are relative to the active window.
- **Properties and problems** - Settings for the active window's file are maintained here. Problems are workspace wide listings.

---

## Corticon assets in a Rule Project

In this view of the Corticon Studio, the OrderProcessing [Rule Project](#) is loaded. The editor view has each of the four file types in a Corticon project open:

- **Vocabulary** - An `.ecore` file is structured dictionary containing all necessary business terms and relationships between them used by the business rules. In this illustration, the Vocabulary is the active window.
- **Rulesheet** - An `.ers` file is a set of conditions and actions and plain language statements written from a common business Vocabulary. A Rulesheet is associated with one Vocabulary. Multiple Rulesheets can use the same Vocabulary.
- **Ruleflow** - An `.erf` file is a set of one or more Rulesheets, embedded service call-outs, and other Ruleflows organized on a canvas for sequential execution. A Ruleflow is compiled into a versioned Decision Service, shown here as `Order_v1_10.eds`, and then deployed on Servers.
- **Ruletest** - An `.ert` file is a set of one or more Testsheets containing sample data used for testing Rulesheets and Ruleflows, all based on the same Vocabulary. While optional, they are the essence of Corticon's test-as-you-go structure.

Once you have defined a Vocabulary, you build Rulesheets that you then assemble into Ruleflows that can include additional functions. You can then create tests to run against the Ruleflow right in the Studio as though it were deployed.

The project illustrated also shows some supporting files that are often placed in the project space:

- **Decision Service package** - An `.eds` file is a versioned package of the compiled rules, ready for deployment.
- **Deployment Descriptor file** - A `.cdd` file is a way to package several Decision Services and their supporting files and properties.
- **JSON and XML test requests** - Well-formed JSON and XML requests are useful for testing a deployed Decision Service.

## Initial menu commands

Many menu commands are standard behaviors in any development environment. Commands that are key to Corticon Studio are available when Corticon Studio opens:

### File Menu

The Corticon actions accessed on the File menu are:

- **New** - Creates the specified Corticon Studio resource dialogs to create Corticon rule projects, their assets and files in the file system. You generally want to create Rule Projects instead of just Projects to ensure that the Corticon Nature is applied.
- **New > Folder** - Creates a new file folder.
- **Import** - Enables import archive files, project folders, or loose files from your file system into an existing project. See [Importing or exporting a Rule Project](#).
- **Export** - Enables export of resources of an existing project to archive files, or the file system. See [Importing or exporting a Rule Project](#).
- **Switch Workspace** - Select a different workspace. Lets you choose whether to save each open file in the editors before restarting into the selected workspace. It is a good idea to update rule assets after you choose a workspace that has not been used recently.

## Edit Menu

The initial Corticon actions accessed on the Edit menu are the basic cut, copy, paste, delete, and select. You might see that the undo/redo actions are available.

## Navigate Menu

The actions accessed on the Navigate menu are standard workbench functions. You can jump to the file in its file system context or you can open its Properties tab. Do not rename, add or delete files, or arrange folders in the project's file system context. Do those actions in the workbench so that the project can apply your changes across all the project's assets.

## Project Menu

The Corticon actions accessed on the Project menu are described in [The Project Explorer window](#) on page 44. They have limited functionality when there are no open projects.

## Vocabulary, Rulesheet, Ruleflow, Ruletest Menus

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**Note:** When a Corticon file is active in the Editor Window, its file type's menu is replaces another type's menu in the menubar. Each of these is described in a separate topic, as follows:

- [Vocabulary menu commands](#) on page 53.
  - [Rulesheet menu commands](#) on page 81.
  - [Ruleflow menu commands](#) on page 106.
  - [Ruletest menu commands](#) on page 134.
- 

## Window Menu

The Corticon actions accessed on the Window menu are:

- **Show View** - Adds a perspective-related view as a tab in the perspective window. Views in the Corticon Designer include **Corticon AI Assistant**, **Comments**, **Localization**, **Natural Language**, **Problems**, **Properties**, **Rule Messages**, **Rule Operators**, **Project Explorer**, **Rule Statements**, and **Rule Vocabulary**. **Other** lists all available views, whether or not directly relevant in the current perspective.
- **Open Perspective** - Opens a defined set of views and editors. You might want to switch to Corticon Classic to extend the Studio user interface to include Eclipse tooling that Corticon Studio does not typically use.
  - **Corticon Designer** - Resets the layout to the views commonly used default Corticon user interface.
  - **Other** - Opens the perspective dialog where you can choose an available perspective, such as **Java** or **Corticon Designer Classic**, the perspective that shows a richer set of Eclipse options.
- **Preferences** - Opens the **Preferences** dialog for the installation. Corticon preferences include:
  - **Progress Corticon**
    - **Setting the override properties file** - The basic override file, `brms.properties`, is installed at the work directory root. You can choose to point to a file that exists at your preferred location that will be the last set of overrides that are loaded.

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**Note:** Changing the override properties file -- and changes within an override file --- are not applied until you restart the Studio.

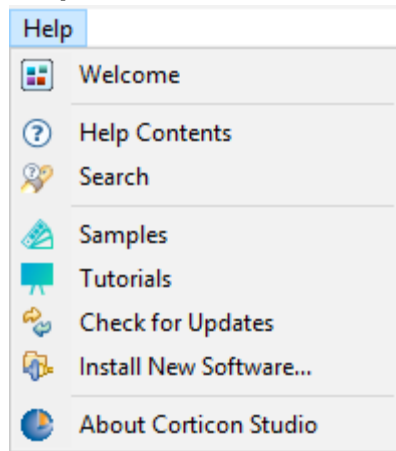
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- 
- **License file path and information** - The current license file information is displayed. You can point a preferred license file or license file location.
- 
- **Note:** Changing the license file location is applied as soon as you click **Apply** or **OK** -- you do not need to restart the Studio.
- 

Click **Apply** to record your selections. Click **OK** to close the dialog.

**Corticon AI Assistant submenu**– Lets you choose your AI Provider and then enter your API Key. Test your key, and then choose other options.

## Help Menu



The Corticon actions accessed on the Help menu are:

- **Welcome** - Opens the Welcome page with access to What's New, Samples, Tutorials, Documentation, and Web Resources. Use the **Home** button in the upper right if the page that opens is not the top page.
- **Help Contents** - Opens the help system window where you can access the Corticon Information Hub for up-to-date documentation for the latest release of the Studio and its related Corticon tools. You can also search for terms, access documentation archives, and browse the help structure of Eclipse and third-party tools.
- **Samples** - Opens the **Welcome** page's **Samples** panel to access and unpack Corticon sample projects.
- **Tutorials** - Opens the **Welcome** page's **Tutorials** panel to access the tutorial documents on the Corticon Information Hub.
- **Check for Updates** - Accesses Progress and related sites to determine whether updates are available.
- **About Corticon Studio** - Details versions and licenses of installed Corticon Studio, Eclipse, and other installed products. Also provides access to installation details.

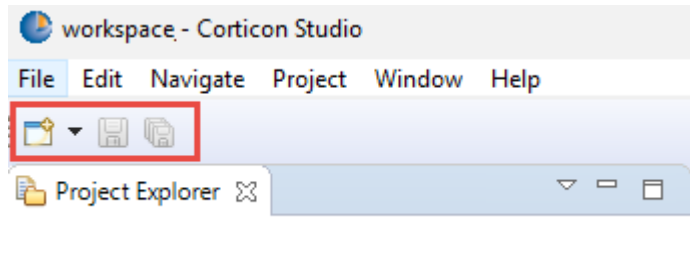
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**Note: Keyboard shortcuts** - Many menu commands have keyboard shortcuts displayed next to their command name. There are also many other general and Eclipse shortcuts that might be relevant in your work. You can open the list of shortcuts by pressing **CTRL+SHIFT+L**. The complete list is accessible at **Window > Preferences**, and then **General > Keys**.




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## Initial tool bar

The initial Corticon Studio toolbar shows tools that create and save assets in open projects. These tools are also accessible as menu commands.



The tools initiate the following actions:

- 
 > **New** open the dialogs to create Corticon rule projects, their assets and files in the file system. You generally want to create Rule Projects instead of just Projects to ensure that the Corticon Nature is applied.
- 
 Saves changes to the active file in the editor window.
- 
 Saves changes to all open files in the editor window.

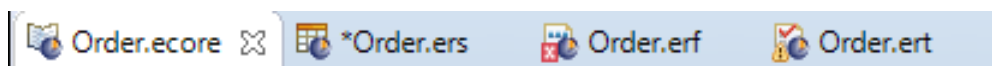
For details, see the following topics:

- [The active Corticon Studio window](#)
- [Alternate settings for Corticon Studio properties](#)
- [Setting the Corticon Studio license file](#)
- [File naming restrictions](#)
- [How to rename and relocate assets in the Project Explorer](#)
- [How to use Git to manage project assets](#)

## The active Corticon Studio window

Any single open window in Corticon Studio can be the *active window*. Indication of active status is provided by the window's tab color. As shown below, the active window's tab is colored **white**, while inactive tabs are colored **gray**. "Shifting focus" (that is, activating a different window), is accomplished simply by clicking anywhere within an inactive window or on the window's tab.

Below, the tabs of four Corticon Studio windows are shown in the editor space.



- The active window's tab is white, **Order.ecore**
- The `.ers` file is not the active window. It has been changed but not saved, as indicated by the asterisk preceding the tab's name.
- The `.erf` file is not the active window and has been saved, but the red square overlaying the window's file type icon indicates there is an error somewhere in the file content, as described in the **Problems** window.

- The `.ert` file is not the active window and has been saved, but the yellow triangle overlaying the window's file type icon indicates there is an warning somewhere in the file content, as described in the **Problems** window.

## Alternate settings for Corticon Studio properties

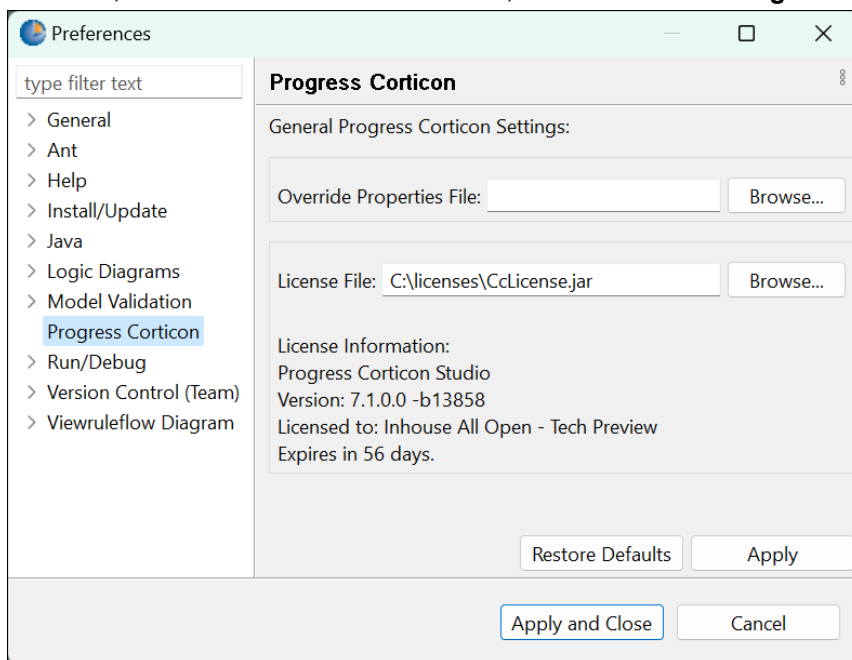
Corticon changes many behaviors based on properties that you can customize in `[CORTICON_WORK_DIR]/brms.properties`. Studio enables you to specify variations of this file that you can locate and name as suits you.

### Using an alternate location and name for the Studio's properties

You can choose to point Corticon Studio to a preferred location or name of the `brms.properties` file.

#### To set an alternate location of the properties settings file in Studio:

1. The file must exist before you can point to it. You can copy the default file located at Studio's installation root, or you can just create a new file and give it your preferred name, such as `my_brms.properties`. Save the file at your preferred location, such as `C:\preferences\`.
2. In Studio, choose **Window > Preferences**, and then choose **Progress Corticon**:



Enter or browse to the override properties file you created. After editing and saving your overrides file, click **Apply and Close**, and then restart Corticon components for their changes to take effect. The properties in these files are described in detail in the following topics. When Corticon starts up, it will apply your properties file with your settings.

For more information, see the topic *"Server properties and settings" in the Server Guide*.

## Setting the Corticon Studio license file

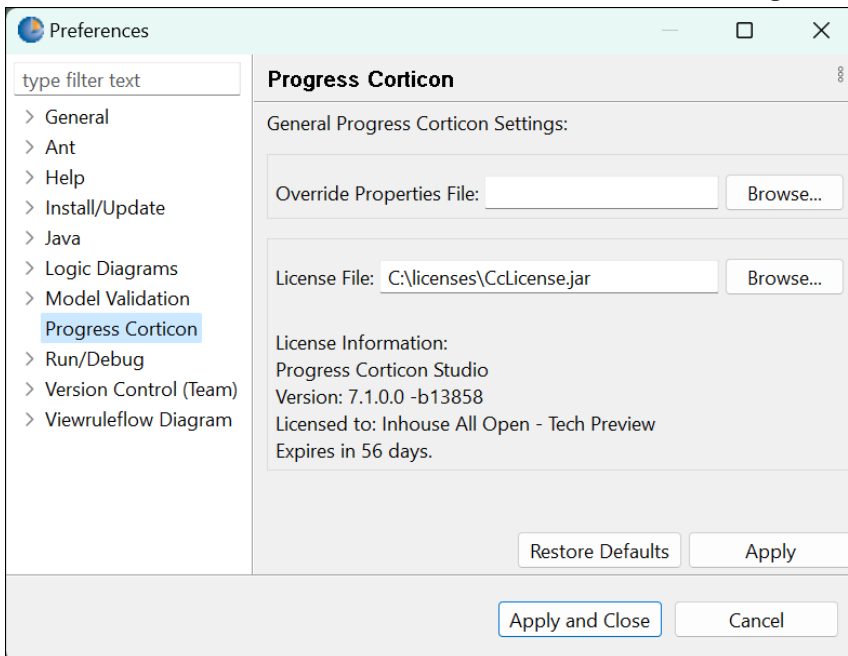
Corticon Studio requires a valid license. That means that it has a path and file name it can access. The file is best as a local file so that routine reading of the license is not constrained.

### Using an alternate location and name for the Studio's license file

You can choose to point Corticon Studio to a preferred location or name of the `brms.properties` file.

#### To set an alternate location of the license file in Studio:

1. Once you are issued a license, save the file in a local access folder, such as `C:\licenses`.
2. In Studio, choose **Window > Preferences**, and then choose **Progress Corticon**:



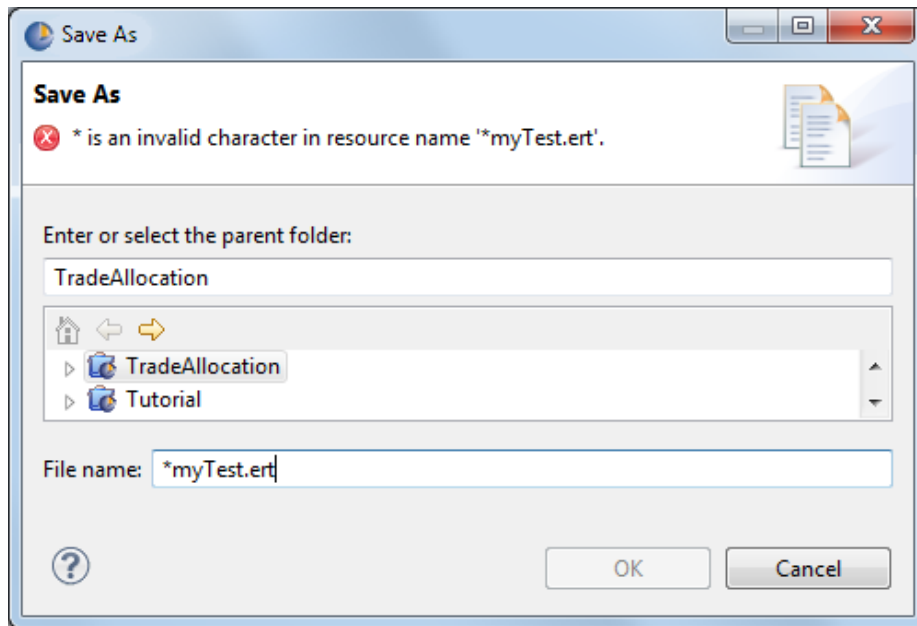
If you chose to select a license file during installation, the file path and name are shown as well as its information. If you want to apply a different license, browse to the license file you prefer. After editing and saving your preferences file, click **Apply and Close**. The license is applied immediately.

For more information, see the topic *"Server properties and settings"* in the *Server Guide*.

## File naming restrictions

File names must comply with the following rules:

- File names must not begin with a space, but can contain spaces in subsequent character positions.
- File names can contain or start with almost any alphanumeric character and most special characters - the **Save** or **Save As** dialog will inform you if you choose a prohibited character, as shown:



## How to rename and relocate assets in the Project Explorer

When your project becomes large, you might want to revise some of the file names, and then sort them into various folders. Within Studio, you can rename *Corticon rule asset files* -- Vocabularies (.ecore), Rulesheets (.ers), Ruleflows (.erf), and Ruletests (.ert) -- and folders within their project. You can also move files to other new or existing folder hierarchies in the project. The Studio *refactors* these changes so names and paths within the project are correspondingly adjusted in all the related rule asset files in the project.

Examples:

- You relocate the project's Vocabulary to a new `vocab` folder. Rulesheets, Ruletests, and Ruleflows that reference the Vocabulary are automatically updated.
- You rename a Rulesheet that is referenced in several Ruleflows. The Rulesheet and the Ruleflows that include that Rulesheet are automatically updated.
- You rename a Ruleflow that is the test subject of a Ruletest. The Ruleflow and the Ruletests that reference that Ruleflow are automatically updated.

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**Note:** Close all files that are active in editors before attempting to change or move files in the Project Explorer. If your change impacts a file that is open in a Studio editor -- whether directly or by reference -- the Studio will close the file without saving any changes you have made since the last save action.

---

**Note:** Perform renaming and relocation changes *within* Corticon's Project Explorer. Other techniques for file name and path changes, such as Windows Explorer or command line interface, will result in dependent file references becoming invalid.

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**Note:** This functionality relates only to Corticon rule asset names and paths. Renaming a Vocabulary's elements -- domains, entities, attributes, and associations -- is advisable only before you create assets based on the Vocabulary.

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**Note:** Deployment oriented files (and any other non-rule asset files) are unchanged. You might need to regenerate schema files (.xsd and .wsdl). Decision Service files (.eds) are each complete package, but Deployment Descriptor files (.cdd) files will require manual editing to update rule asset names and paths.

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## How to use Git to manage project assets

Progress Corticon recommends using a source code repository to manage files in your projects. Source code repositories are software version control systems that manage access to files in a repository, and help maintain current and historical versions of the files.

Corticon Studio bundles a plugin for the popular version control system **Git**.

Use Git, or another source code control repository to perform important file management operations. These systems provide several features and options but typically you will use only a small handful of them on a daily basis for:

- Checking-out a rule project you need to work on
- Adding new rule assets to a project and committing them to the repository to share with others
- Making changes to rule assets and committing them back to the repository
- Changing the organization of rule assets by moving them to different folders
- Adding markers to the repository to identify the version or assets at a release milestone

Corticon rule assets are XML files. You can compare different versions of XML files using a `diff` command; however; the output is in XML format which can be difficult to interpret.

The EGit plugin provides a Git perspective, a **File > Import** function, and **Preferences** in the **Team** section. The EGit plugin bundled with Corticon Studio provides basic command line features. For information about EGit advanced command line features, see <http://www.eclipse.org/egit/documentation/>.

To access Git documentation, downloads, and community, see <https://git-scm.com/doc>

## Corticon AI Assistant

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The Corticon AI Assistant leverages artificial intelligence to help you explore, generate, and better understand the assets in your Corticon rule projects. With it, you can ask the AI questions, generate new rules from plain text instructions or code snippets, or make requests about the currently selected rule asset. Potential uses range from simple tasks, such as generating a summary of a rulesheet, to more context-aware inquiries, such as understanding how an attribute is used in a ruleflow or creating new rules based on your business requirements.

The Corticon AI Assistant enhances rule project development and maintenance by providing many benefits, including:

- Improved understanding of rule assets
- Automatic generation of project documentation
- Creation of rules from plain text instructions or code
- Insight into the impact of planned changes
- Easier onboarding of new team members

Seamlessly integrated into Corticon Studio, the Corticon AI Assistant brings the power of AI directly into your rule modeling experience.

### **Prerequisite: You Need Your Own AI Account**

To use the Corticon AI Assistant, you must have an active account with an AI service provider -either **OpenAI** or **Azure OpenAI**. You will need to obtain an API key from your provider and enter it into Corticon Studio. The Assistant does not work without this, and each organization is responsible for managing its own AI subscription and keys.

## Getting Started with the AI Assistant

The Corticon AI Assistant **integrates** seamlessly into your rule modeling workflow, but it does require a one-time setup before you can begin. These simple steps will help you connect the AI Assistant to your organization's chosen AI provider and ensure everything is ready for productive use.

### Before you begin:

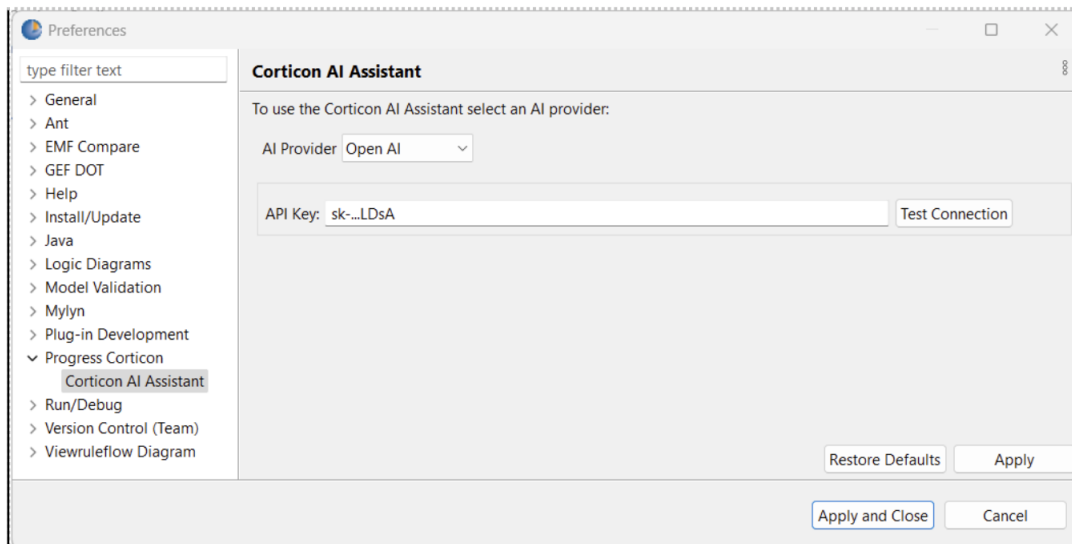
To use the Corticon AI Assistant, you must have an active account with OpenAI or Azure OpenAI, and the required credentials from your provider.

- **OpenAI users:** You will need your API key.
- **Azure OpenAI users:** You will need your API key and your Azure OpenAI endpoint URL.

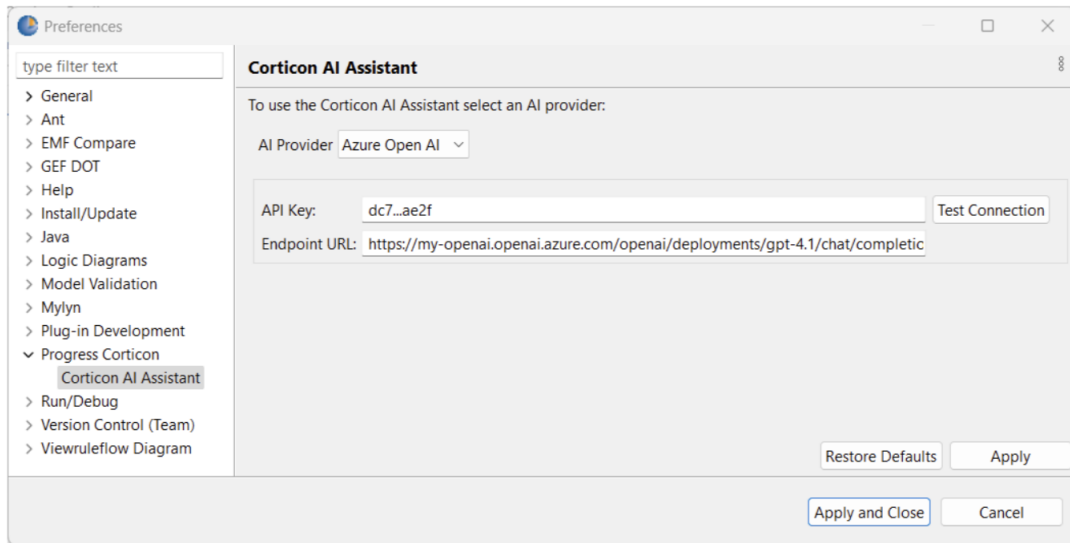
Make sure your organization has set up this account and you have access to these details.

### To connect and access the AI Assistant in Corticon Studio:

1. Open Corticon Studio on your computer.
2. From the top menu, select **Windows > Preferences**.
3. In the Preferences panel, go to **Progress Corticon > Corticon AI Assistant**.
4. Choose your API:
  - **For OpenAI:** Enter your API key.



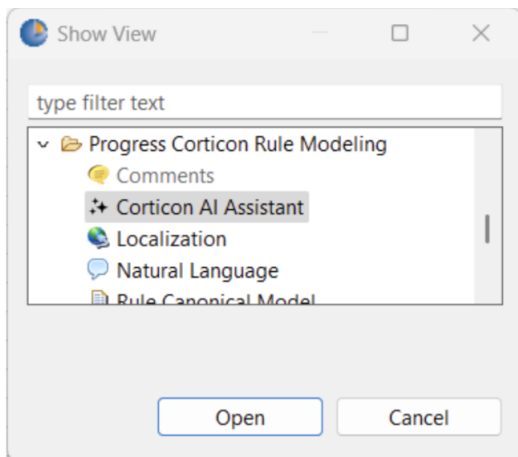
- **For Azure OpenAI:** Enter both your API key and the Azure endpoint URL.



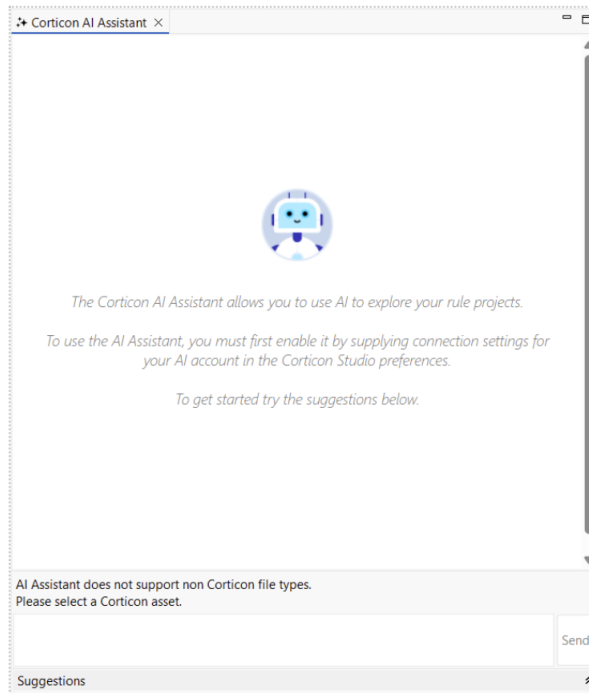
5. Click **Apply and Close** to save your settings.

### To open the Corticon AI Assistant panel in Corticon Studio

1. Go to the top menu and select **Windows > Show View > Corticon AI Assistant**.
2. If **Corticon AI Assistant** is not shown in the initial list, select **Other...** instead. In the window that appears, scroll through the options, select **Corticon AI Assistant**, and then click **Open**.



Once opened, the AI Assistant panel will appear in your workspace. You can keep this panel open as you work, and close or reopen it at any time as needed. The panel is ready for you to enter prompts, ask questions, generate rules, or troubleshoot your rule assets.



For details, see the following topics:

- [Using the Corticon AI Assistant](#)
- [How the AI Assistant works](#)
- [Exploring Rule Assets with AI](#)
- [Writing Rules with plain text instructions](#)
- [Creating Rules from code snippets](#)
- [Creating test data from plain text instructions](#)
- [Working within your Vocabulary](#)
- [Fixing Rulesheet errors](#)
- [Working in any language](#)
- [Helpful tips for effective use](#)
- [Use reasoning levels](#)

## Using the Corticon AI Assistant

Once the Corticon AI Assistant panel is open, you can immediately begin interacting with your rule assets. The Assistant is designed to respond to your questions, requests, or instructions about the rulesheet, vocabulary, or ruleflow you have selected in Studio.

### To use the AI Assistant:

1. Open the vocabulary, rulesheet, or ruleflow you want to work with in Corticon Studio. The AI Assistant will automatically reflect the currently open rule asset:

Ask AI Assistant about:  
Corticon Ruleflow **Calculate Daily Insurance.erf**



2. Type your question, instruction, or prompt into the AI Assistant panel:

Ask AI Assistant about:  
Corticon Ruleflow **Calculate Daily Insurance.erf**



3. Click **Send** to submit your request.
4. The AI Assistant will display a response directly in the panel for you to review, copy, or use as needed:

Corticon AI Assistant ×

**Question about Calculate Daily Insurance.erf**

List the steps in this ruleflow with a 1-2 sentence description of each.

**AI generated response**

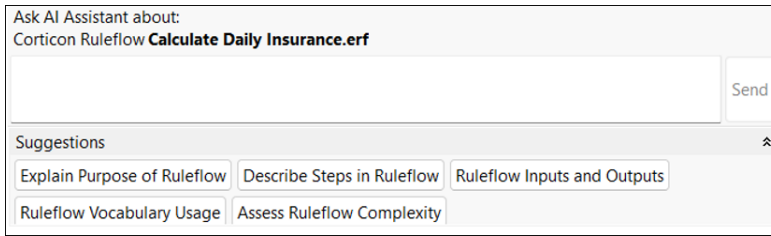
The ruleflow consists of three main steps, each defined by a rulesheet:

1. **Calculate Daily Insurance Per Distance Driven:** This step calculates the daily insurance cost for drivers based on their age, distance driven, and years of driving experience, applying various conditions to determine the appropriate insurance cost.
2. **Adjust Daily Insurance Based On Zone Driven:** This step modifies the calculated insurance cost by considering the driver's risk zone, age, and the distance driven, ensuring that the insurance cost reflects the potential risk associated with different driving scenarios.
3. **Adjust Daily Insurance Based On Vehicle Cost:** In this step, the system adjusts the insurance cost further based on the driver's vehicle cost and age, applying additional uplift based on specific conditions to finalize the insurance cost for the day.

Ask AI Assistant about:  
Corticon Ruleflow **Calculate Daily Insurance.erf**



5. You'll also see suggested prompts tailored to the type of rule asset you have open—these can help you get started if you're new or want ideas for what to ask:



## How the AI Assistant works

Understanding how the Corticon AI Assistant operates will help you get the most from your interactions.

- **Prompt Classification:** When you submit a prompt, the Assistant first sends your request to the AI service to determine what type of action you want to perform—such as generate rules or explore an asset.
- **Context Awareness:** Based on the action identified, the Assistant prepares a request that may include your selected rule asset (such as a vocabulary, rulesheet, or ruleflow) and any other information needed to service your prompt.
- **Request Processing:**
  1. Your prompt is classified by the AI (such as “generate rules” or “explore an asset”).
  2. The Assistant then sends your rule asset and supporting information, along with clear instructions, to your chosen AI provider (OpenAI or Azure OpenAI).
  3. The AI analyzes the provided information and generates a response.
  4. Depending on the type of action, the response will either be displayed in the Assistant panel or an asset will be updated—for example, new rules may be added directly to a rulesheet.
- **Stateless Interactions:** Each prompt is handled independently—the Assistant does not remember previous interactions, which protects your privacy and ensures clear results.
- **Prompt Size Considerations:** For very large ruleflows or rule assets, there may be technical limits on the amount of information sent to the AI provider. If your project is especially large, you may get better results by working with individual rulesheets or smaller ruleflows.

### Disclaimers

- Policies regarding the handling of data provided to the AI Assistant are between you, the user, and your AI provider. For details, refer to their policies. Progress Software is not responsible for how the AI provider processes data provided through the AI Assistant.
- AI-generated responses may be incomplete or contain errors. Progress Software is not responsible for the accuracy or content of AI-generated responses.

### AI Assistant Capabilities by Asset Type

The Corticon AI Assistant provides different capabilities depending on the selected asset type. For some assets, you can ask analytical or explanatory questions to gain insights. For others, you can generate new content such as rules or test cases.

| Asset Type | Ask Questions About Asset | Create Content for Asset |
|------------|---------------------------|--------------------------|
|------------|---------------------------|--------------------------|

|            |     |     |
|------------|-----|-----|
| Vocabulary | Yes | No  |
| Rulesheets | Yes | Yes |
| Ruleflows  | Yes | No  |
| Ruletests  | No  | Yes |

**Ask Questions** — Enables the AI Assistant to analyze and explain the logic, structure, or behavior of the asset.

**Create Content** — Enables the AI Assistant to generate new elements for the asset, such as rules in a rulesheet or test cases in a ruletest.

## Data Privacy and Usage Notes

Protecting your information is a priority when using the Corticon AI Assistant. Please review the following points to ensure your use of the Assistant aligns with your organization's standards and expectations:

- **Your data and AI provider:**

All information you send through the Corticon AI Assistant is transmitted to your selected AI provider (OpenAI or Azure OpenAI). Data handling, retention, and privacy are governed by your organization's agreement with that provider. Be sure to follow any internal guidelines for sharing business or sensitive data.

- **No retained memory:**

The Assistant does not retain any information between prompts. Each request is independent and processed without knowledge of your previous interactions.

- **Prompt size and project limits:**

For very large ruleflows or rule assets, there may be token limits on the amount of data that can be sent to the AI provider in a single request. If you encounter issues, try working with individual rulesheets or smaller ruleflows.

- **Validation is required:**

Because results can vary, you are responsible for reviewing and testing all AI-generated rules and suggestions before using them in production or critical business processes.

- **Results may vary:**

AI-generated content is meant to assist and accelerate your rule modeling work, but it may not always be perfect or fully aligned with your business logic. Always use your professional judgment when evaluating responses.

# Exploring Rule Assets with AI

The AI Assistant can help you quickly understand, document, and analyze your rule assets—whether it's a vocabulary, rulesheet, or ruleflow—in Corticon Studio. By simply having your asset open, you can ask the Assistant a wide range of questions or request specific types of analysis. This makes it easier to get up to speed on existing projects, plan changes, or share documentation with your team.

**To interact with your rule assets:**

1. Open the vocabulary, rulesheet, or ruleflow you want to work with.
2. Enter your question, instruction, or request in the AI Assistant's panel using plain text.
3. Click **Send**, and then review the AI Assistant's response.

Use suggested prompts beneath the entry field to see common or recommended actions:

Ask AI Assistant about:  
Corticon Ruleflow **Calculate Daily Insurance.erf**

Here are a few example prompts to give you inspiration:

- **Understanding rulesheets:**
  - “Summarize what this rulesheet does.”
  - “List all the business rules defined in this rulesheet.”
  - “What happens when the applicant’s credit score is below 600?”
- **Exploring vocabulary:**
  - “List the associations in this vocabulary.”
  - “What attributes are related to cost?”
- **Ruleflow navigation:**
  - “How does this ruleflow process new applications?”
  - “Which rulesheets are used for calculating discounts?”
- **Impact analysis:**
  - “What is impacted if I change the new driver age from 24 to 21?”
  - “List the rulesheets which use cost related attributes.”
- **Documentation and explanation:**
  - “Generate documentation for this rulesheet.”
  - “Explain how the ‘eligibility’ attribute is used in this ruleflow.”
- **Quick clarifications:**
  - “Show me all the conditions that trigger a rejection.”
  - “Which rules are related to late payment fees?”

By experimenting with different types of questions, you can use the Assistant as both a learning tool and a productivity booster. Suggested prompts tailored to your currently open asset will also appear beneath the input area for inspiration.

# Writing Rules with plain text instructions

The Corticon AI Assistant makes it easy to create business rules by describing them in plain text—no specialized syntax required. You simply express your requirements or policies in everyday language, and the Assistant translates those instructions into rules within your open rulesheet.

## How it works:

- The Assistant interprets your plain text prompt, matches it to the vocabulary and entities defined in your current rulesheet, and generates one or more rules based on your description.
- For best results, your instructions should use terms and concepts already present in the rulesheet's vocabulary.

The Assistant will **only add new rules** to the current rulesheet. Existing rules are not modified or deleted.

## Steps to write rules with plain text:

1. Open the rulesheet where you want to add new rules.
2. Enter your plain text instruction or copy it from another document.
3. Click **Send**. The Assistant will generate rules in line with your description and display them for review.
4. **Review and test the generated rules** to ensure that they match your business intent and function as expected. AI-generated content may not always perfectly match your intent, and validation ensures rules are correct, complete, and work as expected in your project.

Here are a few example prompts you might use:

- “Applicants over 18 with a valid driver’s license are eligible.”
- “If the order amount is over \$1,000, apply a 5% discount.”
- “Reject claims where the date of service is before the policy effective date.”
- “Set the customer status to ‘Premium’ if they have made more than five purchases this year.”
- “Late fees are waived for gold tier members.”

## Complex Example:

The AI Assistant can also handle more complex, multi-condition business rules. For example, you might enter the following prompt to add a group of related rules for insurance cost calculations:

Ask AI Assistant about:  
Corticon Rulesheet **Demo1.ers**

For drivers aged 18-25:

- If driving 1 to 29 miles and has 2 or fewer years of driving experience, the insurance cost is 14.58.
- If driving 1 to 29 miles and has more than 2 years of driving experience, the insurance cost is 3.98.
- If driving 30 miles or more, the insurance cost is 5.49.

For drivers aged 26-32:

- If driving less than 40 miles, the insurance cost is 1.34.
- If driving 40 miles or more, the insurance cost is 4.66.

For drivers aged 33-50:

- If driving less than 50 miles, the insurance cost is 2.45.
- If driving 50 miles or more, the insurance cost is 2.95.

Send

After you click **Send**, the Assistant will generate a set of corresponding rules and display them in the panel for your review.

| Conditions                   | 0 | 1      | 2      | 3      | 4      | 5      | 6      | 7      |
|------------------------------|---|--------|--------|--------|--------|--------|--------|--------|
| a Driver.age                 |   | 18..25 | 18..25 | 18..25 | 26..32 | 26..32 | 33..50 | 33..50 |
| b Driver.distanceDrivenToday |   | 1..29  | 1..29  | >=30   | <40    | >=40   | <50    | >=50   |
| c Driver.yearsDriving        |   | <=2    | >2     |        |        |        |        |        |
| d                            |   |        |        |        |        |        |        |        |
| e                            |   |        |        |        |        |        |        |        |
| f                            |   |        |        |        |        |        |        |        |
| Actions                      |   |        |        |        |        |        |        |        |
| Post Message(s)              |   |        |        |        |        |        |        |        |
| A Driver.insuranceCostToday  |   | 14.58  | 3.98   | 5.49   | 1.34   | 4.66   | 2.45   | 2.95   |
| B                            |   |        |        |        |        |        |        |        |
| C                            |   |        |        |        |        |        |        |        |

### Reviewing the AI's Reasoning

After generating rules from a complex prompt, the AI Assistant also displays a detailed explanation of how your original instruction was interpreted. This “reasoning” section helps you understand how each rule was constructed and ensures that the logic matches your intent.

Below is an example of the type of reasoning you might see in the response window:

**AI generated response**

Decomposed the input prompt into the following rule texts and generated the Corticon Rules based on the following reasoning:

1. Rule 1
  - Rule Text: For drivers aged 18-25: If driving 1 to 29 miles and has 2 or fewer years of driving experience, the insurance cost is 14.58.
  - Reasoning: The rule specifies conditions for drivers aged 18-25 who are driving a distance between 1 and 29 miles and have 2 or fewer years of driving experience. The vocabulary contains the necessary attributes for age and distance driven today to implement this rule. The insurance cost is set to 14.58.
2. Rule 2
  - Rule Text: For drivers aged 18-25: If driving 1 to 29 miles and has more than 2 years of driving experience, the insurance cost is 3.98.
  - Reasoning: This rule also pertains to drivers aged 18-25, but it covers those who have more than 2 years of driving experience while driving between 1 and 29 miles. The required attributes are available, and the cost is set to 3.98.
3. Rule 3
  - Rule Text: For drivers aged 18-25: If driving 30 miles or more, the insurance cost is 5.49.
  - Reasoning: This rule applies to drivers aged 18-25 who drive 30 miles or more. The necessary conditions are checked, and the insurance cost is set to 5.49.
4. Rule 4
  - Rule Text: For drivers aged 26-32: If driving less than 40 miles, the insurance cost is 1.34.
  - Reasoning: This rule targets drivers aged 26-32 driving less than 40 miles. The condition checks the age and distance driven today, and sets the insurance cost to 1.34, using the available attributes.

### Tips for the best results:

- Review your rulesheet vocabulary (entities, attributes, values) before writing instructions.
- Be specific and use terms that match your model.
- If the Assistant cannot find a match for your prompt in the vocabulary, it will either use the closest option or let you know it cannot proceed.
- You can copy and paste requirements or policy statements directly from business documents, emails, or specifications into the AI Assistant prompt.

# Creating Rules from code snippets

In many projects, business logic already exists as code—perhaps in Java, JavaScript, or another programming language. The Corticon AI Assistant allows you to quickly convert such logic into rules for your rulesheet, helping bridge the gap between technical requirements and business automation.

## How it works:

- You can paste a code snippet that represents your business rule logic into the Assistant's prompt area.
- The Assistant will read the code, interpret the logic, and generate corresponding rules using the vocabulary in your open rulesheet.

Just like with plain text prompts, the Assistant will **only add new rules** to your rulesheet—it will not modify or delete existing rules.

## Steps to create rules from code snippets:

1. Open the rulesheet where you want to add new rules.
2. Paste your code snippet into the AI Assistant's prompt area.
3. Click **Send**. The Assistant will analyze the code and generate rules based on its logic, mapped to your rulesheet's vocabulary.

**Review and test the generated rules** to confirm they meet your needs.

Here are a few example code-based prompts you might use:

- `if (customerType == "Gold" && purchaseAmount > 1000) { discount = 0.15; }`
- `if (claim.dateOfService < policy.effectiveDate) { claim.status = "Rejected"; }`
- `if (age >= 65 && drivingMiles < 50) { insuranceRate = 0.07; }`

## Complex Example:

The AI Assistant can also interpret more sophisticated business logic from longer code blocks, including multiple conditions and nested logic. For example, you can paste the following JavaScript-style code to create a comprehensive set of insurance cost rules:

Ask AI Assistant about:  
Corticon Rulesheet **Demo1.ers**

```

if (iAge >= 18 && iAge <= 25) {
  if (iMilesDriven >= 1 && iMilesDriven <= 29) {
    if (iExperience <= 2) {
      dInsuranceCost = 14.58;
    } else {
      dInsuranceCost = 3.98;
    }
  }
} else if (iMilesDriven >= 30) {
  dInsuranceCost = 5.49;
}
} else if (iAge >= 26 && iAge <= 32) {
  if (iMilesDriven < 40) {
    dInsuranceCost = 1.34;
  } else {
    dInsuranceCost = 4.66;
  }
} else if (iAge >= 33 && iAge <= 50) {
  if (iMilesDriven < 50) {
    dInsuranceCost = 2.45;
  } else {
    dInsuranceCost = 2.95;
  }
} else if (iAge >= 51 && iAge <= 65) {
  if (iMilesDriven < 40) {
    dInsuranceCost = 1.99;
  } else {
    dInsuranceCost = 2.21;
  }
} else if (iAge > 65) {
  if (iMilesDriven < 30) {
    dInsuranceCost = 1.45;
  } else {
    dInsuranceCost = 1.89;
  }
}

```

Send

### Tips for the best results:

- Use clear code that reflects business intent, and ensure the terms in your code match entities and attributes in your rulesheet’s vocabulary.
- The Assistant supports code snippets in any language recognized by your AI provider.

## Creating test data from plain text instructions

The Corticon AI Assistant can automatically generate test data for your rulesheets based on plain text instructions. This makes it easy to create input data that exercises all rule conditions, helping you validate behavior and ensure complete coverage without manually building test cases.

### How it works

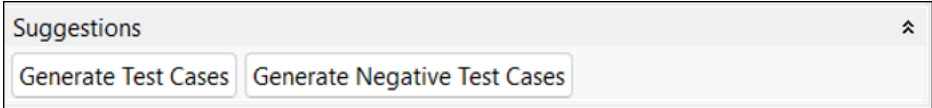
When generating test data for a rulesheet, the AI Assistant has access to both:

- The rule definitions in the rulesheet.
- The scoped vocabulary—the subset of vocabulary elements (entities, attributes, and associations) used within that rulesheet.
- Which vocabulary elements are used as inputs versus outputs. This is important as it allows the assistant to only generate data for inputs and thus making the tests set concise and more readable.

Using this information, the AI produces structured and realistic test inputs that align with your model and reflect how the rules operate.

### Generating test data automatically

The simplest way to create test data is by clicking the suggestion “Generate Test Cases”.



This command generates input records designed to exercise each rule in the rulesheet, performing a form of white box testing—testing that uses knowledge of the rule logic to ensure every condition and action path is executed at least once.

Once the response is received, the generated data is immediately added to the input in the rule test sheet. If the results are not what you intended, you can press Ctrl+Z to undo and remove the generated data. The AI Assistant only adds data—it never deletes existing data in a test sheet. Additionally, you can refine the test data by editing the tests.

**Providing more focused instructions**

You can guide the AI by providing more detailed or targeted prompts to shape the test generation process. For example:

- “Generate test data for 10 applicants over age 65.”
- “Create 5 inputs that will exercise Rule #3.”
- “Add examples where claims should be denied due to missing coverage.”

This flexibility lets you generate data that emphasizes specific conditions or edge cases. The AI uses your additional criteria to tailor the output while still conforming to the rulesheet and vocabulary scope.

**How the scoped vocabulary influences generation**

When generating test data, the AI Assistant uses the scoped vocabulary and the rulesheet’s structure to ensure all generated data fits correctly. It matches the input structure to the entities and associations actually referenced by the rules.

A good example is the Cargo sample project:

- In its default form, the Cargo rulesheet operates directly on the Cargo entity:

| Scope  | Conditions                 | 0 | 1        | 2        | 3           | 4      |
|--|----------------------------|---|----------|----------|-------------|--------|
| <ul style="list-style-type: none"> <li>▼ Cargo               <ul style="list-style-type: none"> <li>container</li> <li>needsRefrigeration</li> <li>volume</li> <li>weight</li> </ul> </li> </ul> | a Cargo.weight             |   | <= 20000 | -        | > 20000     | -      |
|  | b Cargo.volume             |   | -        | > 30     | <= 30       | -      |
|  | c Cargo.needsRefrigeration |   | -        | -        | -           | T      |
|  | d                          |   |          |          |             |        |
|  | e                          |   |          |          |             |        |
|  | Actions                    |   |          |          |             |        |
|  | Post Message(s)            |   | ✉        | ✉        | ✉           | ✉      |
| A  | Cargo.container            |   | standard | oversize | heavywei... | reefer |

When you generate test data for this rulesheet, the AI uses this scope to produce inputs consisting of Cargo instances:

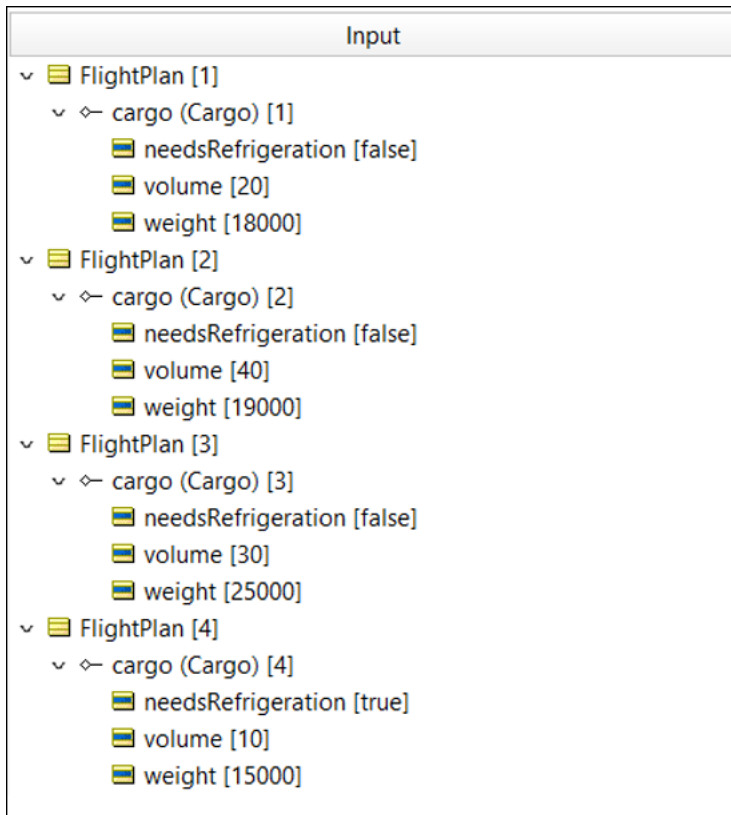
Input

- v ☰ Cargo [1]
  - ☑ needsRefrigeration [false]
  - ☑ volume [10]
  - ☑ weight [18000]
- v ☰ Cargo [2]
  - ☑ needsRefrigeration [false]
  - ☑ volume [40]
  - ☑ weight [15000]
- v ☰ Cargo [3]
  - ☑ needsRefrigeration [false]
  - ☑ volume [25]
  - ☑ weight [25000]
- v ☰ Cargo [4]
  - ☑ needsRefrigeration [true]
  - ☑ volume [30]
  - ☑ weight [12000]

- If the Cargo rulesheet instead operates on FlightPlans that contain associated Cargo items, the test generator automatically adjusts:

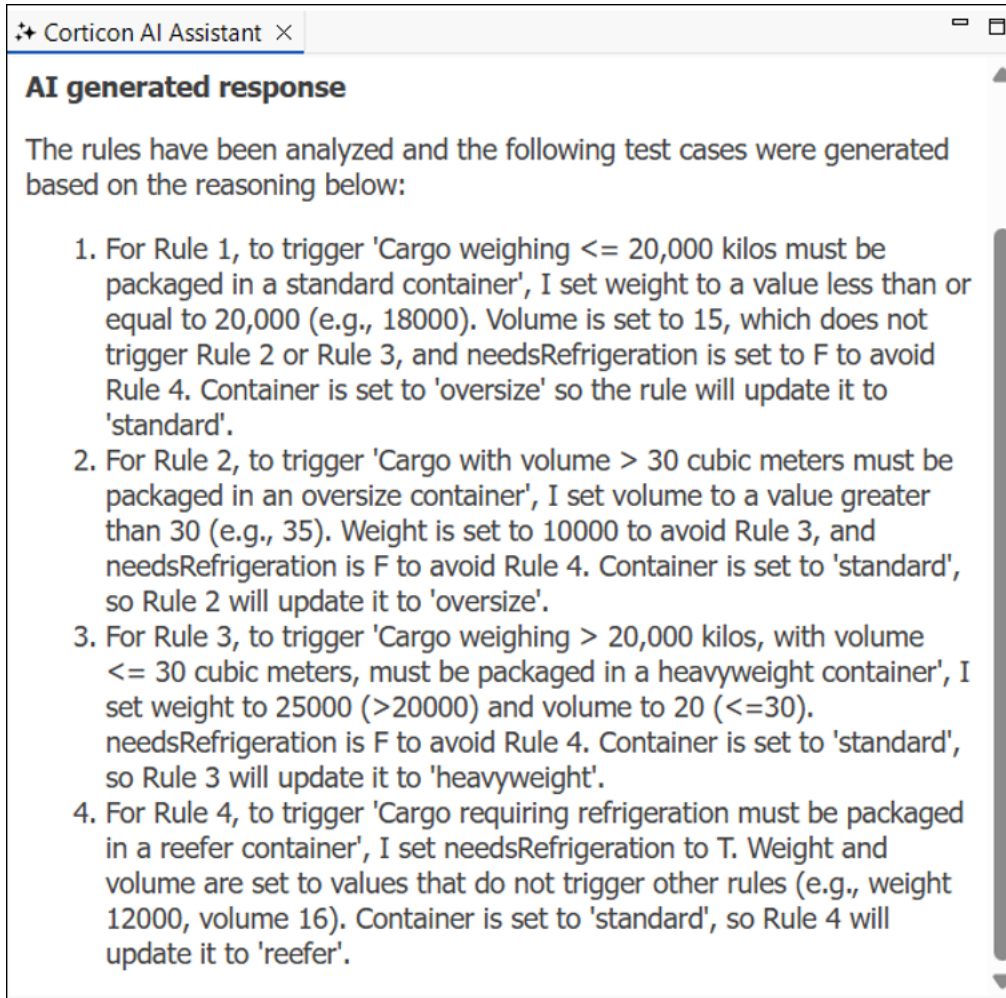
| Scope  | Conditions      | 0                               | 1        | 2        | 3        | 4           |        |
|--|-----------------|---------------------------------|----------|----------|----------|-------------|--------|
| <ul style="list-style-type: none"> <li><span style="font-size: 1em;">v</span> <span style="font-size: 1.2em;">☰</span> Cargo                             <ul style="list-style-type: none"> <li><span style="font-size: 1.2em;">☑</span> container</li> <li><span style="font-size: 1.2em;">☑</span> needsRefrigeration</li> <li><span style="font-size: 1.2em;">☑</span> volume</li> <li><span style="font-size: 1.2em;">☑</span> weight</li> </ul> </li> </ul>   | a               | flight.cargo.weight             | <= 20000 | -        | > 20000  | -           |        |
|  | b               | flight.cargo.volume             | -        | > 30     | <= 30    | -           |        |
|  | c               | flight.cargo.needsRefrigeration | -        | -        | -        | T           |        |
|  | d               |                                 |          |          |          |             |        |
|  | e               |                                 |          |          |          |             |        |
| <ul style="list-style-type: none"> <li><span style="font-size: 1em;">v</span> <span style="font-size: 1.2em;">☰</span> FlightPlan [flight]                             <ul style="list-style-type: none"> <li><span style="font-size: 1.2em;">v</span> <span style="font-size: 1.2em;">☑</span> cargo (Cargo)                                     <ul style="list-style-type: none"> <li><span style="font-size: 1.2em;">☑</span> container</li> <li><span style="font-size: 1.2em;">☑</span> manifestNumber</li> <li><span style="font-size: 1.2em;">☑</span> needsRefrigeration</li> <li><span style="font-size: 1.2em;">☑</span> volume</li> <li><span style="font-size: 1.2em;">☑</span> weight</li> </ul> </li> </ul> </li> </ul> | Actions         |                                 |          |          |          |             |        |
|  | Post Message(s) |                                 |          | ☑        | ☑        | ☑           | ☑      |
|  | A               | flight.cargo.container          |          | standard | oversize | heavywei... | reefer |
|  | B               |                                 |          |          |          |             |        |
|  | C               |                                 |          |          |          |             |        |
|  | D               |                                 |          |          |          |             |        |
|  | E               |                                 |          |          |          |             |        |
| F  |                 |                                 |          |          |          |             |        |

It generates structured input where each FlightPlan includes one or more Cargo objects, reflecting the associations defined in the scoped vocabulary:



### Reviewing AI Reasoning

After generating test data, the AI Assistant provides a reasoning summary describing how it interpreted your rulesheet and vocabulary to produce the test cases. This reasoning helps you understand which rules each test case exercises and how the input data aligns with the rule conditions:



Reviewing this output can confirm that the generated test data accurately represents the expected logic and provides insight into why certain combinations were chosen.

## Working within your Vocabulary

The Corticon AI Assistant generates rules using only the entities, attributes, and values defined in your rulesheet's vocabulary. This means that the Assistant is always aligned with your specific business context, helping to prevent errors and keep rules consistent.

### Key points to remember:

- When you create rules - either from plain text instructions or code snippets - the Assistant relies entirely on the entities, attributes, and associations already present in your vocabulary.
- If your prompt or code refers to items not found in the vocabulary, the Assistant will either:
- Use the closest available options, or

- Notify you that it cannot proceed with the request.
- Before generating rules, it's helpful to review your vocabulary so you understand exactly which terms are supported. This makes it easier to phrase your instructions in a way that the Assistant can interpret.

#### Tips for success:

- Match your prompts and instructions to the names of entities and attributes as they appear in your vocabulary.
- Define any new business terms or logic in the vocabulary before attempting to generate rules based on them.
- If you're not sure what's available, you can ask the Assistant to "List all entities in this vocabulary" or "Show the available values for the status attribute."

By staying within your defined vocabulary, you ensure that all generated rules are compatible with your model and ready to be tested or deployed.

## Fixing Rulesheet errors

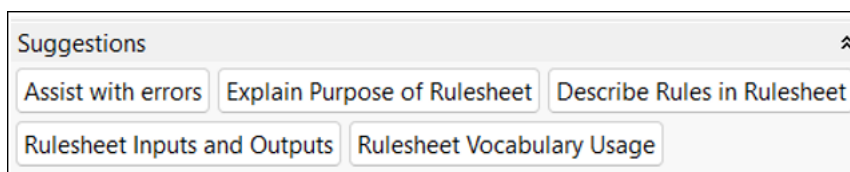
No matter how careful you are when modeling business rules, errors and issues can occasionally occur. The Corticon AI Assistant is designed to help you quickly identify, understand, and resolve these problems, making your rule modeling more efficient and less stressful.

#### How it works:

- If your rulesheet contains errors, you can use the "Assist with errors" prompt found in the AI Assistant panel.
- The Assistant will analyze the rulesheet and provide detailed explanations of each error, along with clear, actionable suggestions for how to fix them.
- This helps both new and experienced users understand not just what is wrong, but also why it's happening and how to correct it.

#### Steps for fixing errors:

1. Open the rulesheet that has errors or issues.
2. In the AI Assistant panel, select or type the "**Assist with errors**" prompt.



3. Click **Send**. The Assistant will review your rulesheet, identify errors, and display a list of issues.
4. Review the Assistant's explanations and recommended fixes.

**AI generated response**

Details on the error: The error message indicates that the expression **Driver.milesDriven** is not valid because there is no attribute named **milesDriven** defined for the **Driver** entity in the provided vocabulary. This means that the rule is attempting to access a non-existent attribute, which leads to a validation error.

Suggested fix: To resolve this issue, you should either remove the reference to **Driver.milesDriven** from the conditions or replace it with a valid attribute that exists in the **Driver** entity. For example, if you want to use the **distanceDrivenToday** attribute instead, the corrected expression would be **Driver.distanceDrivenToday**.

Note: Always ensure that the attributes referenced in your rules are defined in the vocabulary to avoid such validation errors.

5. Apply the suggested changes to your rulesheet as needed.

**What the Assistant provides:**

- A list of detected errors, warnings, or conflicts.
- Explanations for each issue in clear, business-friendly language.
- Specific guidance or steps to resolve each error.

**Best practices:**

- After making corrections, test your rulesheet to ensure all issues have been resolved.
- Remember to review and test your rules after any fixes to confirm that your business logic still behaves as intended.

## Working in any language

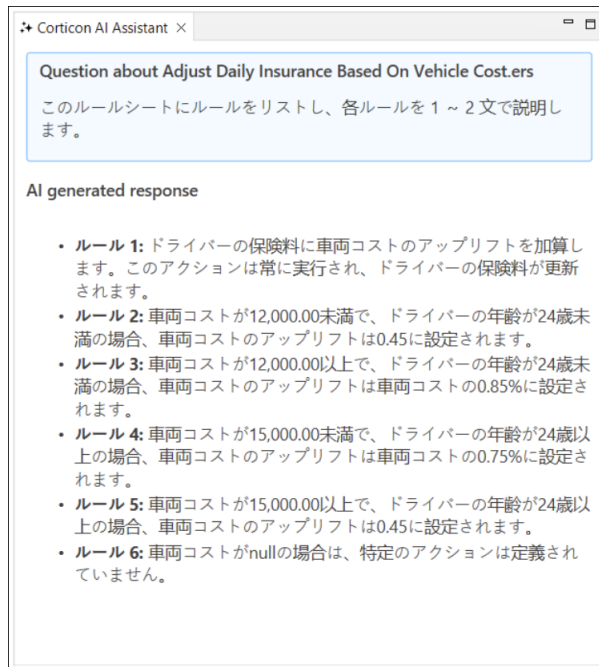
You can use the Corticon AI Assistant in any language supported by your selected AI provider (OpenAI or Azure OpenAI). Simply type your plain text instructions, questions, or requests in your preferred language—the Assistant will recognize the language and respond accordingly. This flexibility supports collaboration across global teams and allows users to work in the language they are most comfortable with.

Ask AI Assistant about:  
Corticon Rulesheet **Adjust Daily Insurance Based On Vehicle Cost.ers**

このルールシートにルールをリストし、各ルールを 1 ~ 2 文で説明します。

Send

The Assistant's response will match the language of your prompt, making it easy to review, share, or document rule logic in any supported language.



## Helpful tips for effective use

These tips will help you create more accurate rules, troubleshoot quickly, and make the most of the Assistant's features:

- **Be descriptive and specific** — The more precise your statements and questions, the more accurate and useful the AI's responses will be. Use terminology that matches your vocabulary and provide enough context for the Assistant to understand your intent.
- **Always review and test output** — Treat AI-generated rules and explanations as a starting point. Carefully review and test everything before using it in production to ensure it meets your business requirements.
- **Experiment with different prompts** — If you don't get the response you expect, try rephrasing your question, breaking down complex requests, or providing more detail. Sometimes a slight change in wording leads to better results.
- **Take advantage of copy and paste** — You can easily copy responses from the Assistant into your rulesheets, documentation, or emails, saving time and reducing manual effort.
- **Request alternate formats when needed** — The Assistant can provide answers in plain text, HTML, or JSON. If you need the response in a specific format, simply ask.
- **Each interaction is independent** — The Assistant does not retain memory of previous prompts. Make sure to include all necessary details in each request to get the most accurate response.
- **Use suggested prompts** — If you're unsure where to start, use the suggested prompts provided for each asset type as a guide or inspiration.
- **Ask for clarification** — If you don't understand a response or need more detail, simply enter your prompt again, adding your request for clarification. For example, you can ask the Assistant to "explain further" or "show the reasoning" behind a rule or suggestion.

- **Copy and use the response** — The AI Assistant's response window is an HTML browser widget, offering familiar behaviors from popular web browsers. Most notably, you can select and copy text from the response to paste it elsewhere, including into your rule assets.
- **Try the prompt again** — AI-generated responses may vary even if the question or request remains the same. If the response doesn't meet your expectations, try submitting the prompt again.
- **Ask for HTML format** — The AI Assistant requests responses in HTML format by default. If the AI doesn't comply, try resubmitting the prompt or include instructions like "Display as HTML" in your request.
- **Request different response formats** — The AI can produce responses in various formats. For example, including instructions such as "Output as JSON" can generate a response in a format that better suits your needs.
- **Ask why** — If you don't understand a particular AI-generated response, you can ask the AI for an explanation. Including directions like "Explain why" or "Explain your reasoning" often provides deeper insights into your rule assets.
- **Ask Questions** — Enables the AI Assistant to analyze and explain the logic, structure, or behavior of the asset.
- **Create Content** — Enables the AI Assistant to generate new elements for the asset, such as rules in a rulesheet or test cases in a ruletest.

## Use reasoning levels

When you ask a question in Corticon AI Assistant, the model can use different reasoning levels. There are three levels available Minimum, Medium and Maximum. You can control which level is used by prompting the AI differently.

### Why Control Reasoning Level

- **Speed:** Depending on the reasoning level, the request might be different by a factor of ten.
- **Cost:** the higher the reasoning level, the more the request will consume "reasoning tokens", which are priced differently

---

**Note:** Currently:

- There is no user interface to adjust the reasoning level.
  - The reasoning level defaults to medium
- 

### User Prompts that influence Reasoning Level

Because the default the reasoning level is medium, with no added keywords, you can expect some reasoning to occur, although not the fastest and cheapest response.

For **high-level reasoning**, use phrases that encourage deep thought and a step-by-step approach. Here are some examples:

```
"Think hard about this."  
"Use your full reasoning capacity."  
"Solve this step-by-step."  
"Provide a detailed chain of thought."  
"Analyze this problem thoroughly before providing an answer."
```

For **minimal-level reasoning**, use phrases that prioritize speed and efficiency over depth. Here are some examples:

"Give a quick, direct answer."  
"Answer concisely."  
"Provide a brief summary."  
"Don't provide any extra explanation."

Try reasoning levels in your prompts and see how the Corticon AI Assistant responds!



## Rule Projects

---

In Corticon Studio, a Vocabulary, as well as any Ruleflows, Rulesheets and Ruletests associated with that Vocabulary, must be stored in a Rule Project.

If you use the default workspace, when you upgrade to later versions of Progress Corticon Studio, your Rule Projects will remain and survive the upgrade process intact.

For details, see the following topics:

- [How to import or export a Rule Project](#)
- [How to create a Rule Project](#)
- [The Project Explorer window](#)

## How to import or export a Rule Project

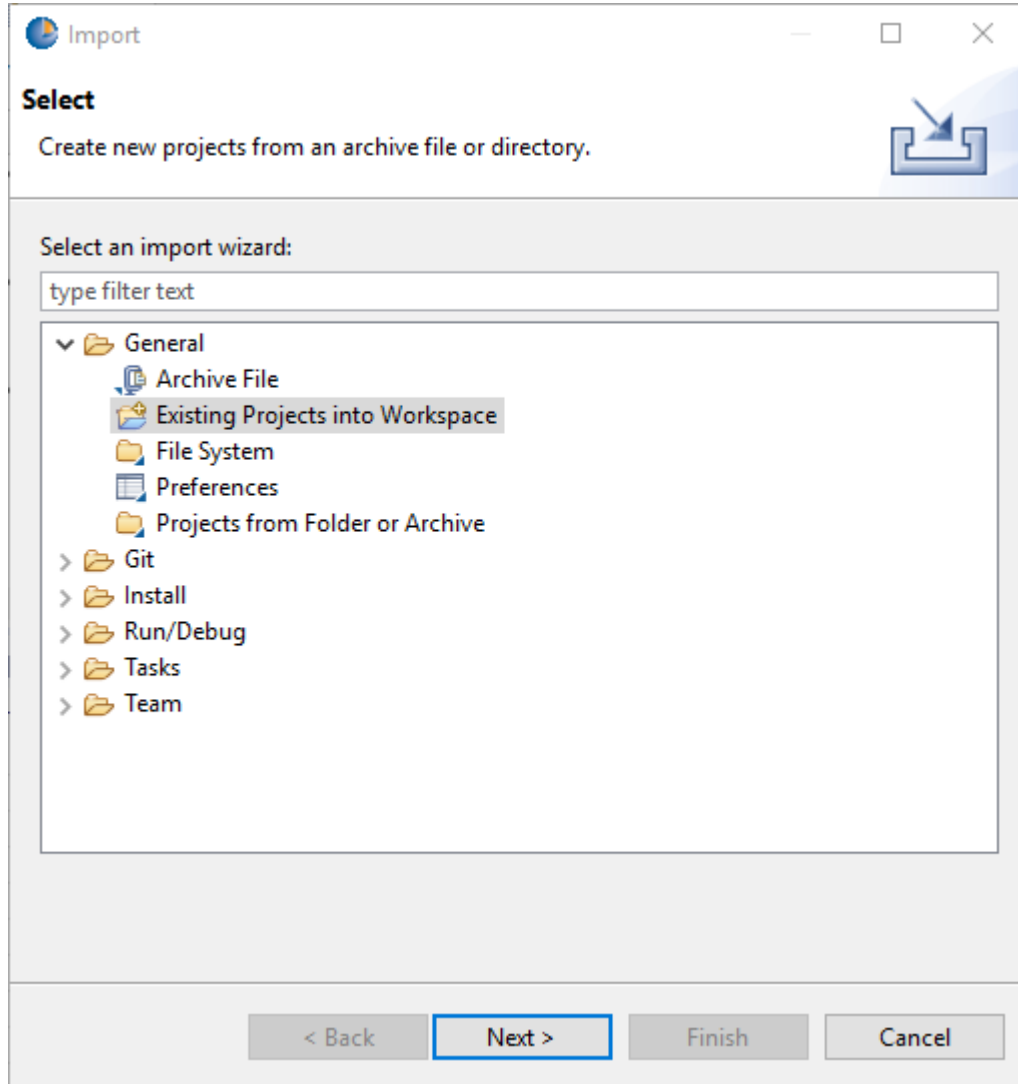
In collaborative development environments, you might need to bring existing rule projects into your workspace, and then, after adding and changing assets, exporting the rule project assets for other developers to access.

---

**Note:** The import and export functions are documented at **Help > Help Contents**, and then **Workbench User Guide > Tasks > Importing** and **Exporting**.

---

Choose **File > Import**. In the dialog, **General** options let you choose from existing projects, the file system, and archives. Imports assume the current workspace as the target folder.



After importing a project, be sure to upgrade rule assets and validate the project before making changes to assets.

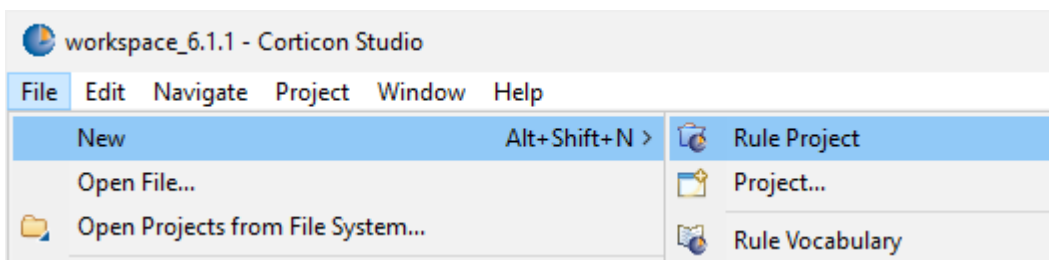
**Note:** If the source project was created and saved in a higher version of Corticon, unpredictable results can occur.

Before performing a project export to the file system or an archive, choose **Save > All**, and then choose **Close > All**.

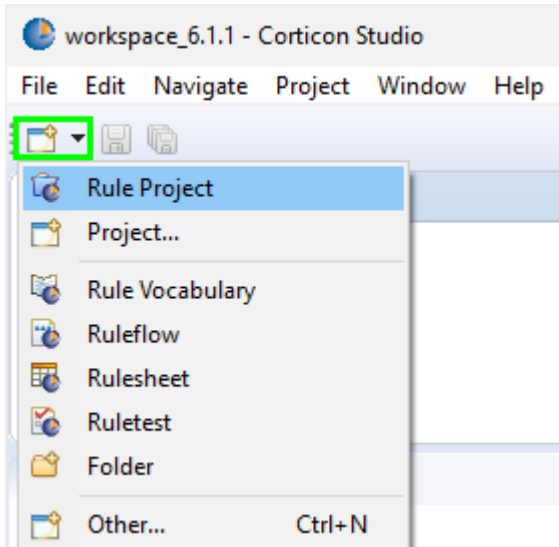
## How to create a Rule Project

To create a new Rule Project, either:

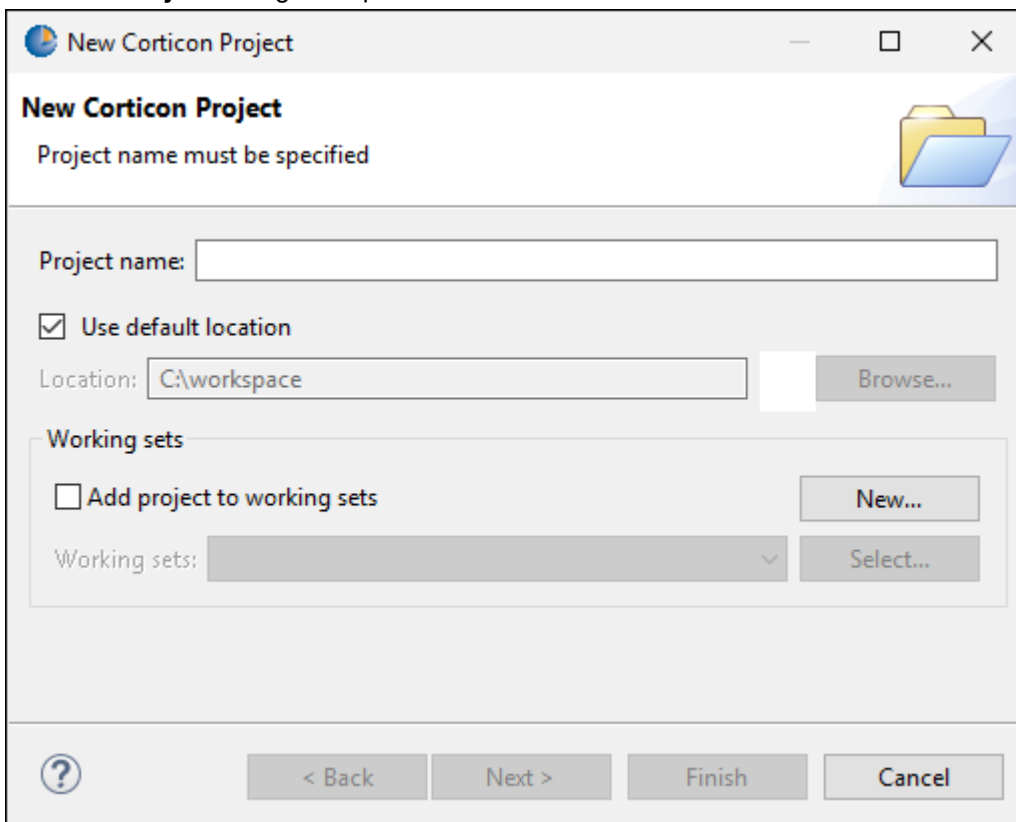
- In Corticon Studio, select **File > New > Rule Project**



- Select **New** on the toolbar, and then select **Rule Project**.



1. The **New Project** dialog box opens:



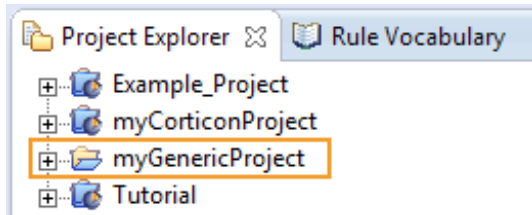
2. Check the **Use default location** option

3. Enter a name for your project in the **Project name** field. Notice that the path to your new Rule Project is automatically appended to Corticon Studio's default workspace folder to define its **Location**.
4. Click **Finish** to create your new Rule Project.

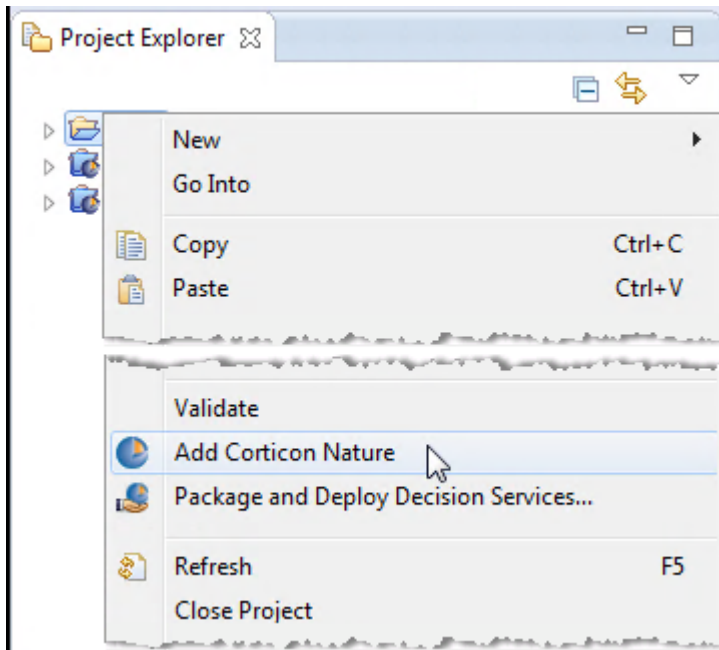
## Corticon Nature

If you chose Project instead of Rule Project, you miss out on the Corticon Nature.

Corticon Studio relies on your project having a "Corticon Nature" that identifies it as a Corticon project and not just a generic Eclipse project. The following illustration shows both Corticon and generic Eclipse projects. Projects having a Corticon Nature are distinguishable by the Corticon icon added to the project icon.



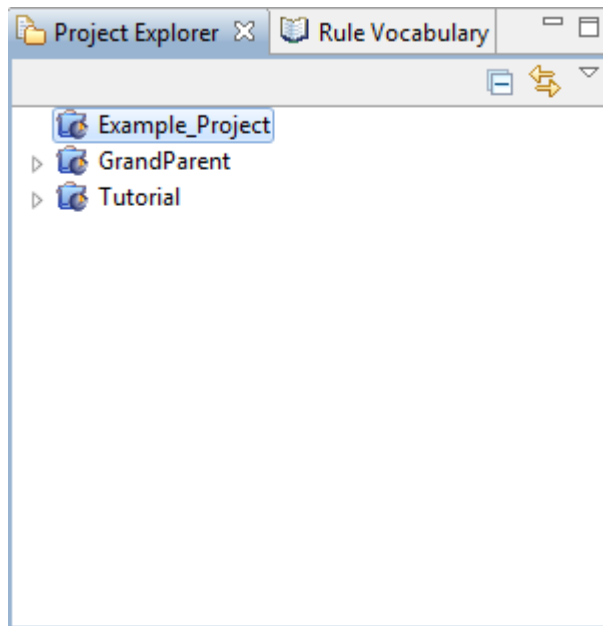
To convert a generic project to a Corticon project, right-click on the project's folder, and then select **Add Corticon Nature**, as illustrated:



## The Project Explorer window

The Rule Project you just created is now listed in the **Project Explorer** window in Corticon Studio.

The **Project Explorer** window provides a convenient way of navigating between your Corticon Studio files, including Vocabularies, Rulesheets, Ruleflows, and Ruletests. Double-clicking on a highlighted file in the list shown in the **Project Explorer** window below will cause the file to open and become the active window in Corticon Studio. Our new `Example_Project`, shown below, is empty, so there are no files available to open yet.

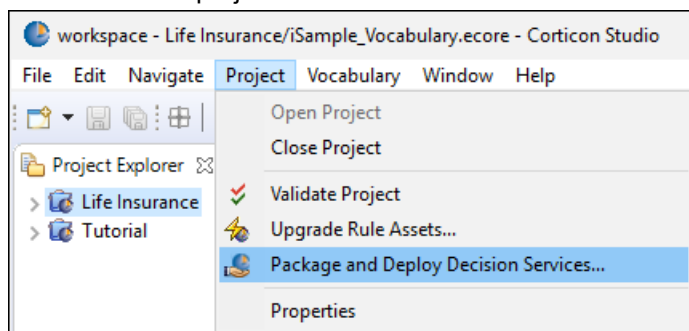


## Project Menu

The **Project** menu has standard Workbench functions, as well as the following:

- **Validate Project** - Generates error markers on files in the current project that have validation errors. If there are errors, review the offending asset to correct the cause of the error, and the revalidate. The project validation process has an impact on available memory, and uses background CPU cycles. When validating large projects, follow the build progress in the **Progress** view (exposed from the menu item **Window > Show View > Other** then **General: Progress**
- **Upgrade Rule Assets** - It is important that you keep project assets in synch with the Studio. If you brought assets into your workspace, you should perform this action. Opens the **Upgrade Corticon Assets** dialog. For a discussion of this feature, see *"How to upgrade projects coming forward from a prior release" in the Corticon Installation Guide*.
- **Package and Deploy Decision Services** - Lets you choose selected Ruleflows to compile as Decision Services. For details, see the topic *"Use Studio to package and deploy Decision Services" section of the Deployment Guide*.
- **Properties** - Opens the dialog that provides several advanced features, one of which enables Corticon Extensions to add service call-out JAR files that will be packaged with Decision Services created in the project. See how to *"Import the Corticon APIs into the Java project" in the Extensions topics*.

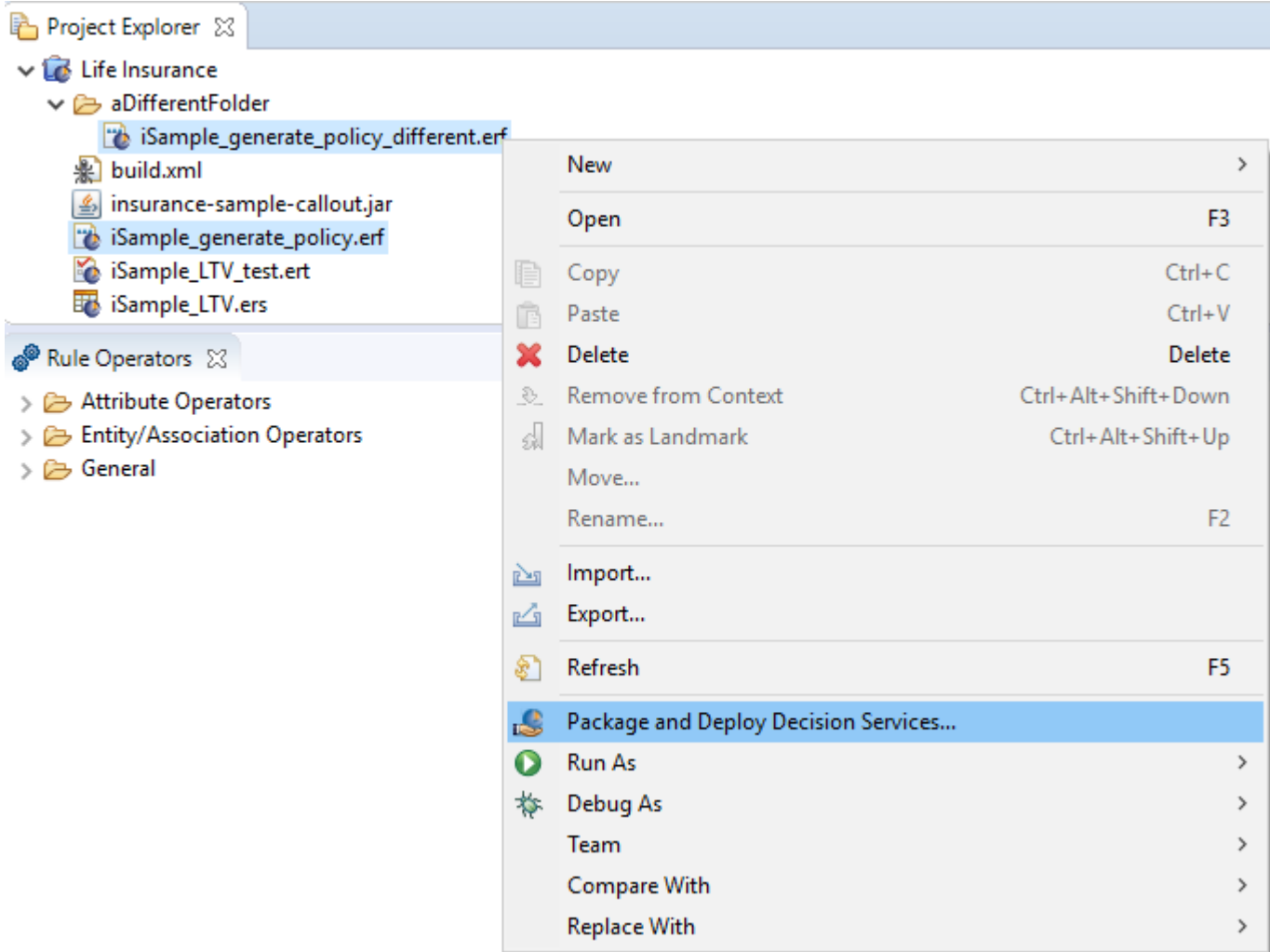
These commands are also accessible on the dropdown menu that opens when you right-click on a project, as shown in this excerpted image where the intent is to package and deploy selected Ruleflows that are in the **Life Insurance** project:



## How to publish selected Ruleflows from Project Explorer

You can select specific Ruleflows for packaging and deployment from the Project Explorer view, and then publish only those Ruleflows as a Decision Service. To package and deploy selected Ruleflows from a project, do the following:

1. Select a project or folder in your Project Explorer view.
2. Select one or more Ruleflows across folders in the project.
3. Right-click and select **Package and Deploy Decision Services**, as illustrated:



When you choose your deployment target, the specified Ruleflows have been selected for compilation and deployment as Decision Services. Forces you to save all changes, then opens the **Package and Deploy Decision Services** dialog. See *"Use Studio to compile and deploy Decision Services"* in the *Deployment Guide*.

## How to upgrade projects coming forward from a prior release

When you install a new release of Corticon Studio, your Corticon development assets (Vocabularies, Rulesheets, Ruleflows, and Ruletests) might need to be upgraded for use in the Corticon Studio. These could be projects you were working on or samples you imported from another location. When you open an asset, Corticon Studio checks the version of the asset, and alerts you if it needs to be upgraded, and encourages you to proceed to upgrade it. The asset upgrade process will force the upgrade of dependent assets that also require a similar upgrade. This task can be tedious if you have a lot of assets and a lot of projects.

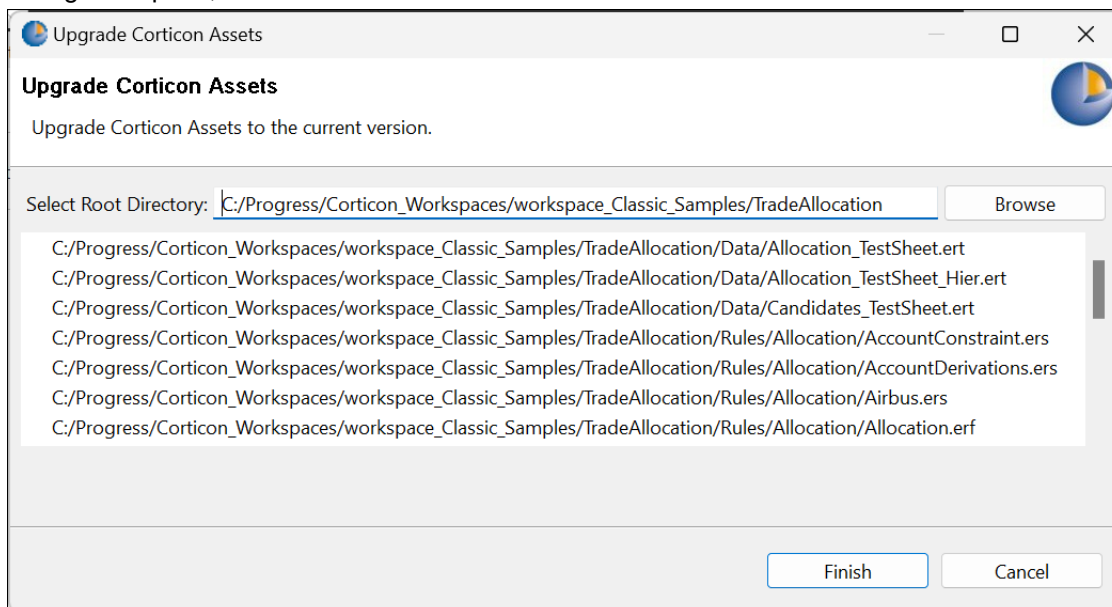
**Note: Comprehensive upgrade steps** - The procedure described here is only a part of an enterprise upgrade of all installations and assets. See "*Procedures for upgrading Corticon installations*" in the *Upgrade Guide*.

The project upgrade utility upgrades one project at a time. Performing this procedure on all your projects just after upgrading your Corticon Studio will relieve you of having to do this task as you work.

**Note:** Once you upgrade your assets, you cannot open them with earlier versions of Corticon Studio.

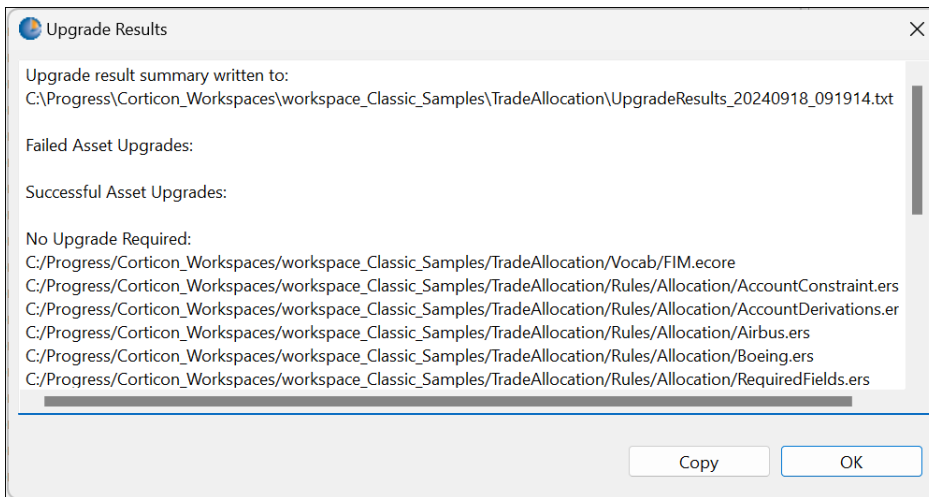
### To upgrade and validate a selected project:

1. Choose the **Upgrade Rule Assets** command,  **Upgrade Rule Assets...**, on the dropdown menu that opens when you right-click on any project name in the **Projects Explorer** view. The **Upgrade Corticon Assets** dialog box opens, as shown:



In this example, the **TradeAllocation** project was selected so all the assets in that project are selected for upgrade.

2. Click **Finish** to start upgrade processing. You are alerted that this process cannot be undone, so consider whether you should cancel, backup the files as-is, and then run the same upgrade process again to completion.
3. After processing, the **Upgrade Results** window opens, listing the assets that required upgrade and were upgraded, as well as those that did not require an upgrade, as shown:



You can choose to click **Copy**, and then paste the text into your preferred text editor. A report is produced and saved at the root of the project.

4. Click **OK** to close the results window and the dialog box.
5. Choose **Validate Project** to generate error markers on files that have validation errors. If there are errors, review the offending asset to correct the cause of the error, and then revalidate .

---

## Vocabularies

---

A Corticon project typically has exactly one Vocabulary. The Vocabulary defines the entities (the things in the model), then attributes of each thing, and finally associations to describe how things relate to each other. It is used to build rule models in [Rulesheets](#) on page 75 and test cases in [Ruletests](#) on page 129.

See *"Build the Vocabulary" in the Rule Modeling topics* for the steps to create a Vocabulary model from either an existing data source, or from scratch.

For details, see the following topics:

- [Use AI Assistant in a Vocabulary](#)
- [How to create a Vocabulary](#)
- [How to define a Vocabulary](#)
- [How to lock and unlock Corticon Vocabularies](#)
- [How to find references to an entity, attribute, or association in a project](#)
- [How to refactor entity attribute or association names in a project](#)

## Use AI Assistant in a Vocabulary

The Corticon AI Assistant can help you explore, understand, and create rule assets directly in Corticon Studio. You can ask questions, generate documentation, create or test rules, and more—all from within the Assistant panel. See *Using the Corticon AI Assistant in this guide* for details.

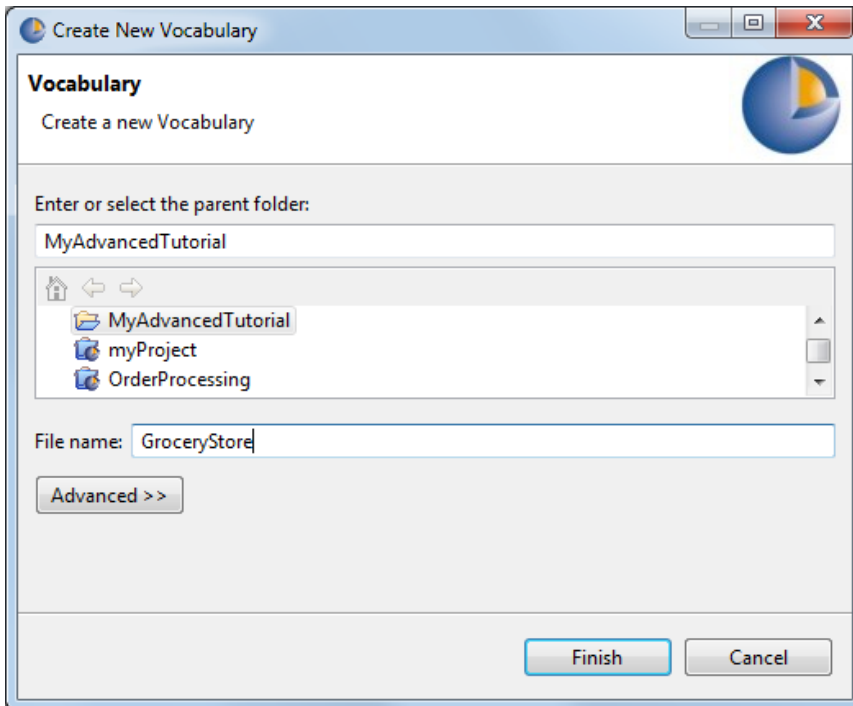
## How to create a Vocabulary

To create a new Vocabulary:

1. Do one of the following:

- Select **File > New > Rule Vocabulary** from the Corticon Studio menubar
- Click the down arrow to the right of the **New** icon
- Right-click in the **Project Explorer** to open its menu, and then choose **New > Rule Vocabulary**.

These techniques all launch the same **Create a New Vocabulary** wizard, as shown:



2. Select the parent Rule Project for the new Vocabulary by highlighting the `Example_Project` folder we just created.
3. Enter a name for the new Vocabulary in the **File name** entry area. It is not necessary to type the file extension `.ecore` (we used `Cargo` here).

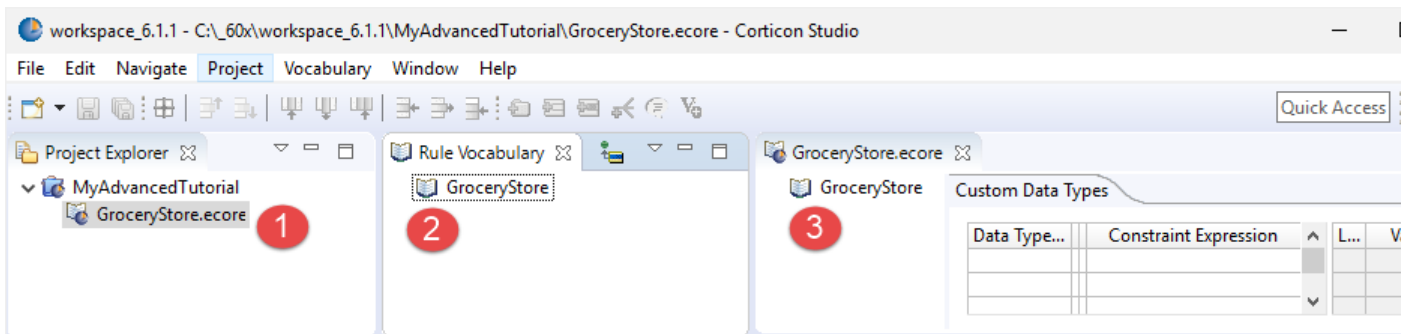
---

**Note:** The **Advanced** options are not relevant to Corticon and should not be used.

---

4. Click **Finish** to create your new Vocabulary.

The Vocabulary is now displayed in the **Project Explorer** window (1), in the new **Rule Vocabulary** window (2), and as the open file and active tab in the **GroceryStore.ecore** window (3) in the following illustration.

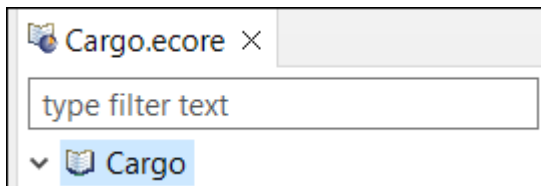


## The Vocabulary window

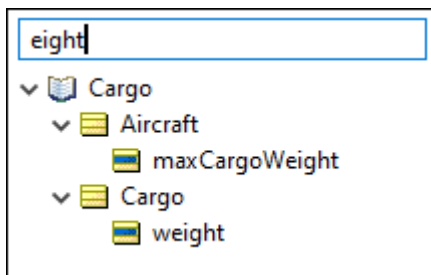
The **Vocabulary** window is the Editor window that displays when its tab is the active window. A Vocabulary file has the extension `.ecore`. As the active window, the Vocabulary menu is available and the toolbar offers Vocabulary tools.

All elements of a Vocabulary are referred to generically as nodes, and these **nodes** are arranged in the Vocabulary window in a hierarchical, or “tree” view.

When a new Vocabulary is displayed in its window, the tree view is empty with the exception of the Vocabulary's “name” node. The name node contains the name of the Vocabulary and an “open book” icon to its left, as shown:



Use **type filter text** to delimit the list to the entities where attributes and associations match the case-sensitive text. as shown in Cargo:










You can use regular expressions to broaden your filter.

## Vocabulary toolbar

When the Vocabulary editor is active, its tools are added to the toolbar, as shown:



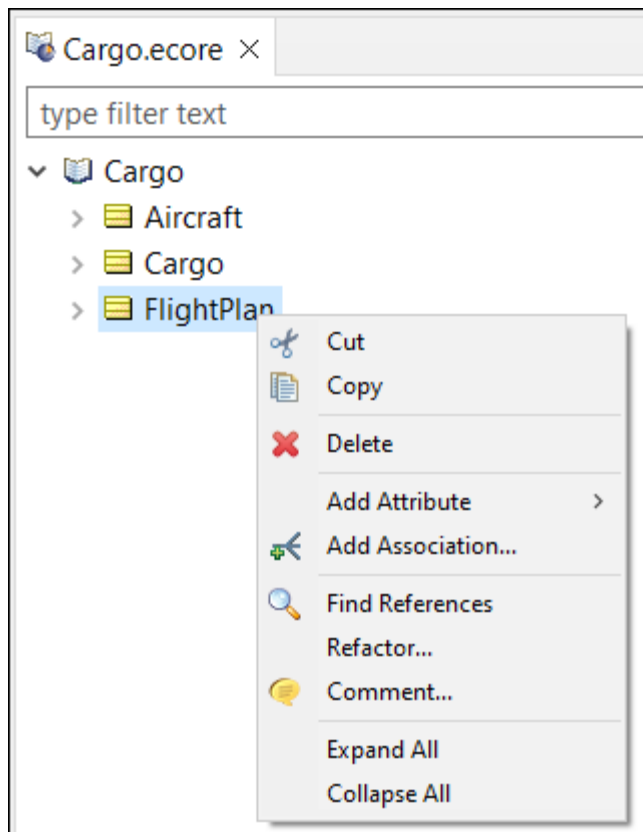
The Vocabulary tools provide the same functions as the corresponding **Vocabulary** menu commands:

-  **Vocabulary > Add Domain.**
-  **Vocabulary > Add Entity.**
-  **Vocabulary > Add Attribute.**
-  **Vocabulary > Add Association.**
-  **Vocabulary > Add Comment.**
-  **Vocabulary > Show Vocabulary Details**  **Hide Vocabulary Details** - Toggles the associated Vocabulary to show or hide details.

## Commands on the Vocabulary context-sensitive menu

In addition to the menubar and toolbar functions, Corticon Studio also provides many Vocabulary functions within a right-click context menu.

A sample Vocabulary Editor Pop-up menu is displayed as shown:



The Vocabulary menu has the following items:

- **Add Domain** - Adds a Domain to the Vocabulary.
- **Add Entity** - Adds an Entity to the Vocabulary.
- **Add Attribute** - Lets you choose the basic data type and then add an Attribute to the selected Entity.
- **Add Association** - Adds an Association between two existing Entities where the selected entity is set as the Source entity.
- **Find References** - Finds references to an entity, attribute, or association in a project.
- **Refactor** - Refactors entity, attribute, or association names in a project.
- **Comment** - Opens the Add Comment dialog to create a comment at this location by the current user.
- **Expand All** - Lists all the attributes and associations in the Vocabulary.
- **Collapse All** - Lists only the Entities in the Vocabulary.

---

**Important:** The right-click pop-up menus are context-sensitive, meaning not all options are available for all Vocabulary nodes. For example, the “Add Attribute” option is only available when an Entity is selected in the Vocabulary tree.

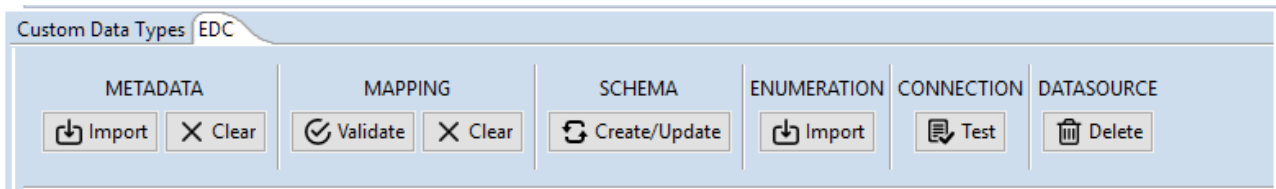
---

## Vocabulary menu commands

The following menu is available when the Vocabulary editor is the active window.

The **Vocabulary** menu has the following items:

- **Add Domain** —Adds a Domain to the Vocabulary. Domains are discussed in the *Rule Modeling Guide*.
- **Add Entity** —Adds an Entity to the Vocabulary.
- **Add Attribute** —Lets you choose the basic data type and then add an Attribute to the selected Entity.
- **Add Association** —Adds an Association between two existing Entities where the selected entity is set as the Source entity.
- **Find References**—Finds references to an entity, attribute, or association in a project.
- **Refactor** —Refactors entity, attribute, or association names in a project.
- **Add Datasource > Add EDC Datasource**




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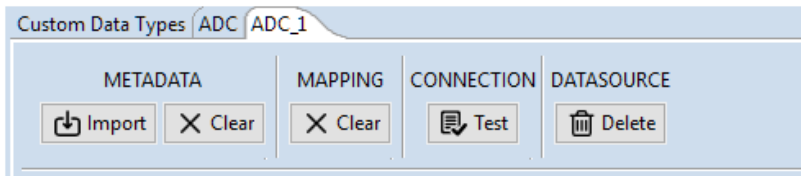
**Note:** The options for SCHEMA and ENUMERATION are not exposed by default. These advanced EDC features can be enabled by setting the following property in your `brms.properties` file:

```
com.corticon.studio.edc.advancedFeatures=true
```

- **METADATA: Import, Clear**—Gets/clears the schema definition from the database. See *“Import EDC database metadata into a Vocabulary” in the Data Integration Guide*.

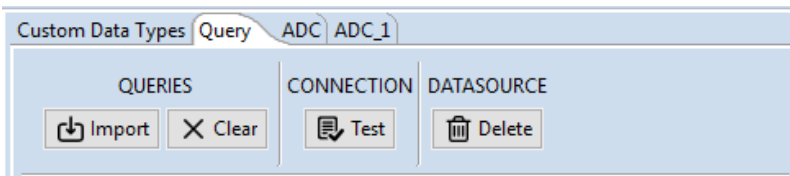
- **MAPPING: Validate, Clear** - Validates/clears the mappings for this Datasource in the Vocabulary. See *"Import EDC database metadata into a Vocabulary" in the Data Integration Guide.*
- **SCHEMA: Create/Update**—Sets up the schema in the defined database. See *"Load the schema and the data in the database" in the Data Integration Guide.*
- **ENUMERATION: Import**—Gets Custom Data Type values from the database. See *"Import possible values of an attribute from database tables" in the Data Integration Guide.*
- **CONNECTION: Test**—Checks the defined connection. See *"Define the database connection for EDC" in the Data Integration Guide.*
- **DATASOURCE: Delete**—Removes this Datasource definition from the Vocabulary.

- **Add Datasource > Add ADC Datasource**



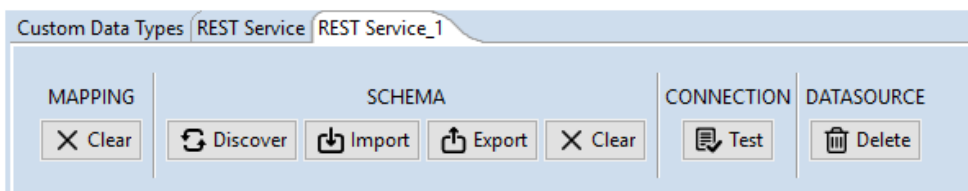
- **METADATA: Import, Clear**—Gets/clears the schema definition from the database. See *"Import ADC database metadata into a Vocabulary" in the Data Integration Guide.*
- **MAPPING: Clear**—Clears the mappings for this Datasource in the Vocabulary. See *"Import ADC database metadata into a Vocabulary" in the Data Integration Guide.*
- **CONNECTION: Test**—Checks the defined connection. See *"Define a database connection for ADC" in the Data Integration Guide.*
- **DATASOURCE: Delete**—Removes this Datasource definition from the Vocabulary.

- **Add Datasource > Add Query Datasource**



- **QUERIES: Import, Clear**—Gets/clears the queries from the database that ADC will use, and then caches them locally. See *"Define and import queries for ADC" in the Data Integration Guide.*
- **CONNECTION: Test**—Checks the defined connection.
- **DATASOURCE: Delete**—Removes this Datasource definition from the Vocabulary.

- **Add Datasource > Add REST Datasource**



- **MAPPING: Clear**- Clears the mappings for this Datasource in the Vocabulary.
- **SCHEMA: Discover, Import, Export, Clear**—Gets the schema definition from the Datasource.
  - *Discover*: Uses the given URL to query the REST Services driver to get the schema, stores it in the Vocabulary, and then uses it to import metadata from the Datasource.

- *Import*: Opens the **Load REST Schema File** dialog to access a defined JSON schema file. The file is stored in the Vocabulary, and then used it to import metadata from the Datasource. See "*Import REST Datasource metadata into a Vocabulary*" in the *Data Integration Guide*.
- *Export*: Creates a JSON file with the schema at the specified location. Exports the Datasource configuration. See "*Export the Datasource Configuration file*" in the *Data Integration Guide*.
- *Clear*: Clears the schema data and the database metadata.
- **CONNECTION: Test**—Checks the defined connection. See "*Define a Datasource connection for REST*" in the *Data Integration Guide*.
- **DATASOURCE: Delete**—Removes this Datasource definition from the Vocabulary.
- **Datasource Configuration File**
  - **Export**—Generate the .xml file with all the data source configurations and credentials used in the project that will be packaged with the project for deployment as a Decision Service on a Corticon Server. See "*Export the Datasource Configuration file*" in the *Data Integration Guide*.
  - **Import**—Read in an existing Datasource Configuration File.
  - **Import Database Access Properties** - Imports an EDC configuration defined in a previous release. See the note in "*Define the database connection for EDC*" in the *Data Integration Guide*.
- **Add Document Mapping > Add XML Mapping**
  - **MAPPING: Clear**—Clear mappings that match naming convention of the elements in your XML payload. See "*XML Mapping*" in the *Deployment Guide*.
  - **MAPPING: Delete**—Clears and removes the XML Mapping panel.
- **Add Document Mapping > Add JSON Mapping**
  - **MAPPING: Clear**—Clear mappings that match naming convention of the elements in your JSON payload. See "*JSON Mapping*" in the *Deployment Guide*.
  - **MAPPING: Delete**—Clears and removes the JSON Mapping panel.
- **Add Document Mapping > Add Java Object Mapping**
  - **METADATA: Import, Clear**—Configures your Vocabulary when the data payload is a map or collection of Java objects to use specified methods. See "*Java object mapping*" in the *In-process Guide*.
  - **MAPPING: Clear, Delete**—Clear removes all the JOM mappings, Delete clears and removes the Java Object Mapping data panel.
- **Populate Vocabulary From Datasource** - Creates and updates the Vocabulary from the schema of a connected REST data source or database. See "*Populate a Vocabulary from a Datasource*" in the *Rule Modeling topics*.
- **Set to Read Only | Set to Read/Write** - Toggles the Vocabulary to limit it from making any changes and to free it to add/modify/delete elements, Datasource access, and custom data types.
- **Show Vocabulary Details | Hide Vocabulary Details**—Toggles the Vocabulary to show or hide details.
- **Populate Vocabulary from JSON**—Enables construction of a vocabulary from a JSON source file or schema.
- **Localize** —Lets you set the Language parameter (Locale) for the Vocabulary and displays the Vocabulary's elements in a list.

- **Report**—Creates an HTML report and launches your browser for viewing. See *"How to create a Vocabulary Report"* in this guide.
- **Export WSDL**—Opens the **Export Vocabulary WSDL** dialog box for this Vocabulary. WSDL service contracts are discussed in the set of topics in the Deployment guide section, *"How to integrate Corticon Decision Services"*.
- **Export XSD**—Opens the **Export Vocabulary XSD** dialog box for this Vocabulary. XSD service contracts are discussed in the set of topics in the Deployment guide section, *"How to integrate Corticon Decision Services"*.

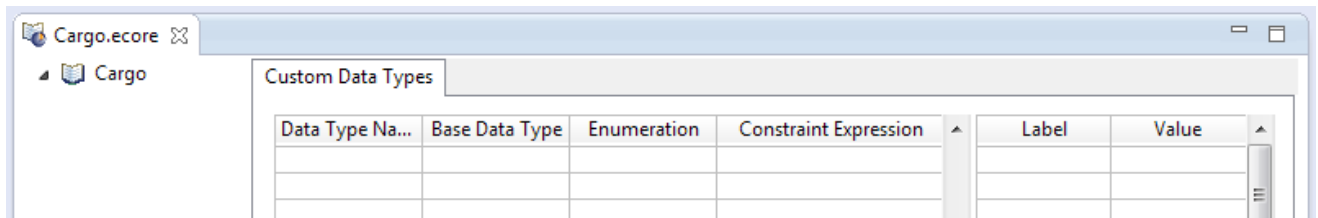
## How to define a Vocabulary

The Vocabulary is the essential catalog of elements that define the use case of the project.

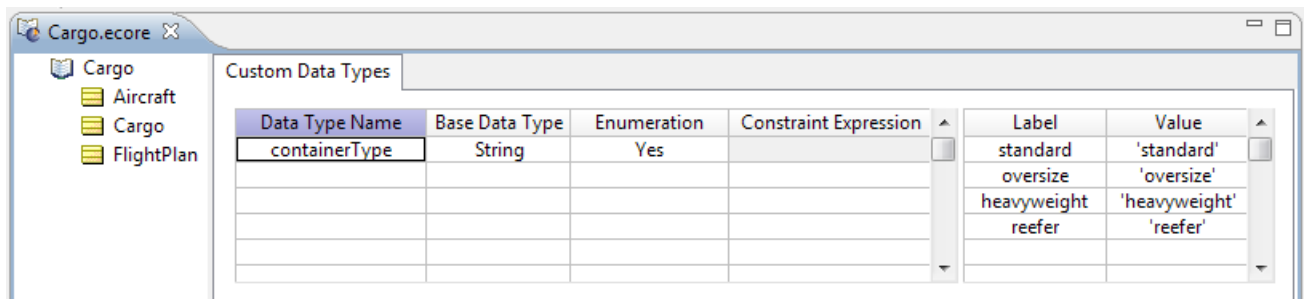
The topics in this section add to what is described in the Corticon Rule Modeling guide, specifically *"Build a Vocabulary by hand"*

### Custom data types tab

At the root of every Vocabulary in its editor, the tab **Custom Data Types** displays, as shown:



You can define lists of values that are the set of allowable values associated with a Vocabulary attribute. The Tutorial sample demonstrates how to delimit the options for a `containerType` by defining labels and their respective values:



### Importing enumerated values from a Datasource

When the Vocabulary connects to a Datasource, additional functionality is added to the **Custom Data Types** tab:

| Data Type Name | Base Data Type | Enumeration | Lookup Table Name | Labels Column | Values Column |
|----------------|----------------|-------------|-------------------|---------------|---------------|
| containerType  | String         | Yes         |                   |               |               |
|                |                |             |                   |               |               |
|                |                |             |                   |               |               |
|                |                |             |                   |               |               |
|                |                |             |                   |               |               |
|                |                |             |                   |               |               |
|                |                |             |                   |               |               |
|                |                |             |                   |               |               |
|                |                |             |                   |               |               |
|                |                |             |                   |               |               |

| Label       | Value         |
|-------------|---------------|
| standard    | 'standard'    |
| oversize    | 'oversize'    |
| heavyweight | 'heavyweight' |
| reefer      | 'reefer'      |
|             |               |
|             |               |
|             |               |
|             |               |
|             |               |
|             |               |

You can specify a column within a table of the connected database to retrieve and import the name and values (or just the values) to populate the selections to the specified attribute.

## How enumerated values function in a Rulesheet

In a Rulesheet, the defined values for attributes that are assigned the custom data type are offered a list of its specified values -- as well as `null` and blank.

| Actions   | Post Message(s) |          |          |             |        |
|-----------|-----------------|----------|----------|-------------|--------|
| A         | Cargo.container | standard | oversize | heavyweight | reefer |
| B         |                 |          |          |             |        |
| C         |                 |          |          |             |        |
| D         |                 |          |          |             |        |
| E         |                 |          |          |             |        |
| F         |                 |          |          |             |        |
| G         |                 |          |          |             |        |
| Overrides |                 |          | {1, 4}   |             | {1, 3} |

For more information about enumerations and retrieving values from Datasources, see:

- *"Enumerations defined in the Vocabulary" in the Rule Modeling Guide*
- *"Enumerations retrieved from a database" in the Rule Modeling Guide*
- *"Import possible values of an attribute from database table" in the Data Integration Guide*
- *"Mapping EDC database tables to Vocabulary Entities" in the Data Integration Guide*

## Datasource tabs

When you choose to define connections to data sources, each instance is defined as a uniquely named Corticon Datasource on a tab of the Vocabulary in its editor. The techniques for Datasource connectivity are:

- **Enterprise Data Connector (EDC) Datasource** - EDC accesses one database per Vocabulary, and enables Corticon to create queries to retrieve and write data as needed. This technique makes for easy data access, and is a good option when modest amounts of data will be accessed with reasonable performance. For more information, see *"Getting Started with EDC" in the Data Integration Guide*.
- **Advanced Data Connector (ADC) Datasource** - One or more ADC connections can be defined, each accessing your store of SQL queries to retrieve and update data in the connected database. ADC is best for requirements where query performance when retrieving large amounts of data is crucial. For more information, see *"Getting Started with ADC" in the Data Integration Guide*.
- **Query Datasource** - The Query Datasource is used to retrieve query names from `CORTICON_ADC_READ` and `CORTICON_ADC_WRITE` tables to be used when defining an ADC Service Callout in a Ruleflow. Exactly one query Datasource is required for an ADC-enabled Vocabulary. For more information, see *"Getting Started with ADC" in the Data Integration Guide*.
- **REST Datasource** - One or more REST Datasources can be defined, each accessing its own specified connection URL. For more information, see *"Getting Started with REST" in the Data Integration Guide*.

## Import Datasource configurations

An alternative to adding data source definitions to your vocabulary is to import the definitions from a Datasource configuration file. This approach allows IT or another person with knowledge of the data sources to define them and make them easy to add to a Vocabulary. To import a Datasource configuration file, do the following:

1. Select **Vocabulary > Datasource Configuration File > Import** from the Vocabulary main menu.
2. Browse to locate the existing Datasource configuration file in the directory structure, and select it to highlight the file name.
3. Click **OK**. The Datasource definitions are added to your Vocabulary.

---

**Note:** If you update existing Datasource definitions by importing definitions from a Datasource configuration file, your existing Datasource connection parameters are updated but not your existing Vocabulary mapping.

---

## Add nodes to the Vocabulary tree view

Nodes are the elements that describe the structure of the Vocabulary.


### Vocabulary node naming restrictions

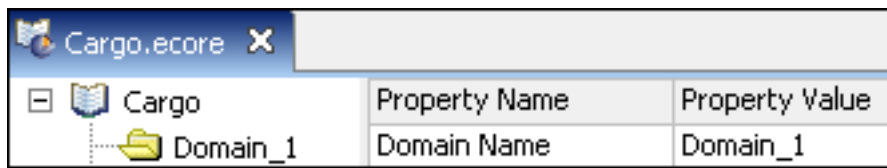
Use the following guidelines when creating new nodes in the Vocabulary:

- Domain, Entity, Attribute, and Association Role node names can contain only alphanumeric characters (letters and numbers), and underscores. However:
  - Domain, Entity, Attribute, and Association Role node names can **not** begin with a number.
  - Spaces are **not** allowed in Domain, Entity, Attribute or Association node names. If the preferred name is a combination of multiple words, then the underscore characters can be used to combine them into a single-word name.
  - Domain, Entity, Attribute, and Association Role node names can begin with an underscore.
  - Domain, Entity, Attribute, and Association Role node names can begin with either an upper or lower case letter.
- No two Entities in the same Domain can have the same node name (case-insensitive).
- Names of Operators (such as `sum`, `floor`, and `month`) can **not** be used as Entity or Domain node names. They *can* be used as Attribute or Association Role node names.
- Custom Data Type names cannot use the names of any of the base data types (such as `string`, `decimal`, `boolean`). For more information, see "*Custom Data Types*" topics in the *Rule Modeling Guide*.
- Names of aliases in the Scope section cannot match (case-sensitive) the node names of Entities in the Vocabulary.
- No two Attributes/Association Role nodes in the same Entity can have the same name (case-insensitive).
- No two Domains within another Domain can have the same node name (case-insensitive).
- No two root-level Domains can have the same node name(case-insensitive).
- No association can have the same name as an entity.

## Add and edit domain nodes and their properties

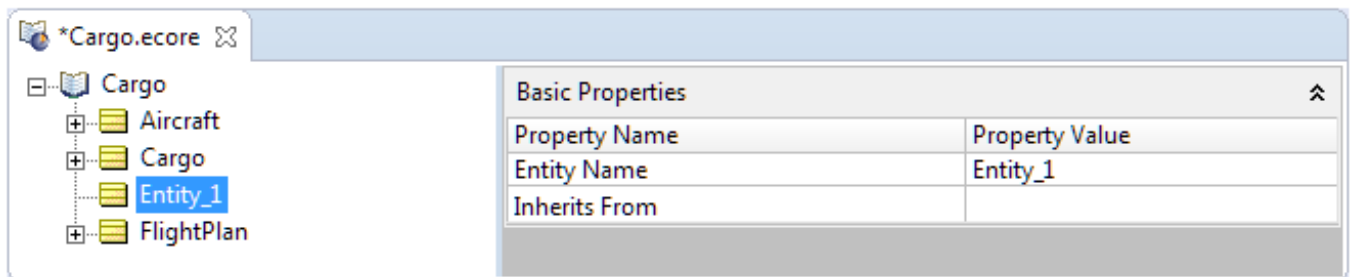
The purpose of Domains is explained in more detail in the Rule Modeling Guide's *Build the Vocabulary* topics. Generally, if all your Entity names are unique, you won't need to use Domains in your Vocabulary. To add a Domain node:

1. Select the name node in the Vocabulary tree view, which is the one with the  icon.
2. Do one of the following:
  - Right-click to display the pop-up menu and choose **Add Domain**
  - Choose **Vocabulary > Add Domain** from the menubar.
3. Select the new Domain node in the Vocabulary tree to display its properties.
4. Assign a Name for the new Domain in the Property Value column to the right, as shown below. Or, double-click the new Domain node in the tree view to edit the default `Domain_1` value. Your changes in either location will be updated in both.



## Add and edit entity nodes and their properties

1. Select the Vocabulary node in the Vocabulary where you want to add an entity
2. Right-click and then choose **Add Entity**
3. Select the Entity in the Vocabulary tree to display its properties, as shown:



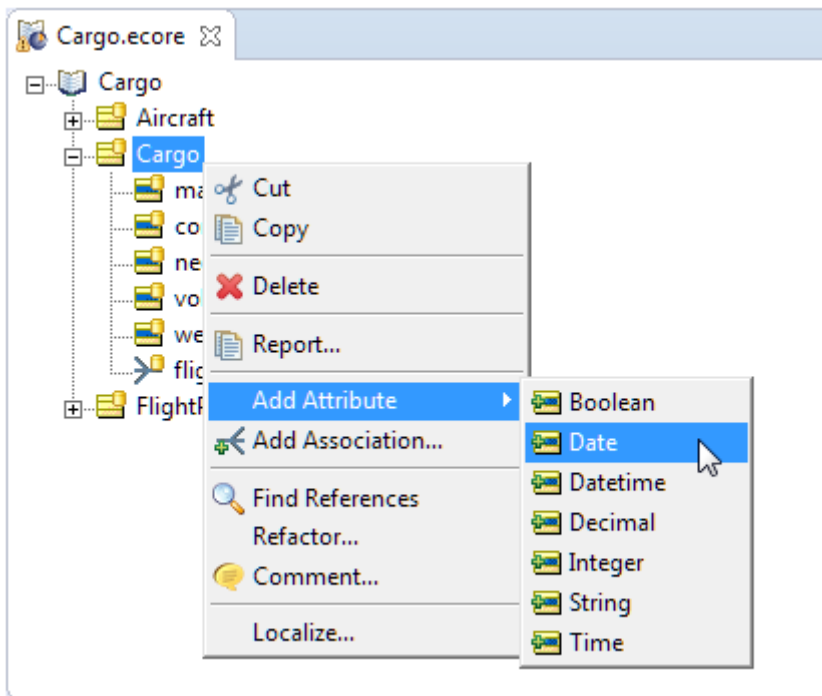
4. Assign property values as listed in the Basic Entity Properties table:


Table 1: Entity: Basic Properties

| Property      | Value  |
|---------------|--|
| Entity Name   | Assign a name to the entity. By default, this will be pre-filled as <code>Entity_x</code> , where <code>x</code> is an automatically determined unique number. As with Domains, double-clicking the node in the tree view will also open an editing box. Name changes made in either the node or the property will update in both places |
| Inherits From | Optional. The Vocabulary model contains extensive support for inheritance concepts. For more information on using this feature, refer to the Rule Modeling Guide's <i>Build the Vocabulary</i> topics.   |

## Add and edit attribute nodes and their properties

1. Select the Entity node in the Vocabulary tree view where you want to add an attribute.
2. Right-click, choose **Add Attribute**, and then use its submenu to specify the datatype of the attribute, as illustrated for a Date attribute:

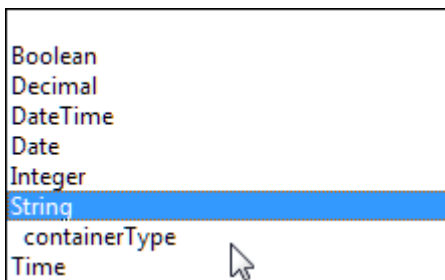


(You could instead choose the menu command **Vocabulary > Add Attribute**.) Note that the toolbar button  always creates a String attribute.

3. After creating the new attribute, the editor cursor lets you modify the default name from `Attribute_n` to your preferred name.
4. If your preferred datatype is a Custom Data Type, click on the dropdown menu for the datatype...

| Basic Properties |                |
|------------------|----------------|
| Property Name    | Property Value |
| Attribute Name   | attribute_1    |
| Data Type        | String         |
| Mandatory        | No             |
| Mode             | Base           |

...and then select the defined Custom Data Type you want to use for this attribute, as illustrated:



5. Assign the other property values as described in the following table.

---

**Note:**

The following table lists the basic properties common to every Attribute.

---

Table 2: Basic Attribute Properties

| Property       | Value   |
|----------------|---|
| Attribute Name | Assigns a name to the new Attribute. As with Domain and Entity nodes, double-clicking the node in the tree view will also open an editing box. Name changes made in either the node or the property will update in both places; however, you should choose to refactor the name instead to insure that it perpetuates throughout the project.   |
| Data Type      | The default value is String. Other available data types: Boolean, Decimal, DateTime, Date, Integer and Time. You can also have a custom data type. All types are described in the <i>Rule Language Guide</i> and in the <i>Rule Modeling Guide's Build the Vocabulary</i> section.  |
| Mandatory      | A mandatory attribute cannot have a value of null. This setting affects the members of the values sets shown in Rulesheet drop-downs. For example, an attribute whose Mandatory value is No will always include a null value selection in its Rulesheet drop-downs.   |
| Mode           | <p>Choose the attribute's Mode from the drop-down list. <code>Base</code> attributes exist or are used by systems outside Corticon, and are included in the XML schemas and contracts. <code>Base</code> attributes map directly to an element in the XML CorticonRequest/Response documents or object properties processed by the Server in production.</p> <p><code>Transient</code> attributes are <i>derived</i> fields; they exist only during rule execution and are not part of XML schemas. They do not need to be included in the XML CorticonRequest documents or objects, and they are not included in the XML CorticonResponse documents or objects produced by the Server in deployment.</p> <p>Transient attributes can, however, be dragged into a Ruletest's Input column and provided input values (often zero) so that calculations in tests produce results that can validate rules.</p> <hr/> <p><b>Note:</b> If you export tests that use transients to XML, and then run them on a deployment Server, the transients are ignored.</p> <hr/> |

## Add and edit association nodes and their properties

To add a new Association node:

1. Select an Entity in the Vocabulary tree view.
2. Perform one of the following:
  - Right-click to display the pop-up menu and choose **Add Association**.
  - Choose **Vocabulary > Add Association** from the menubar.

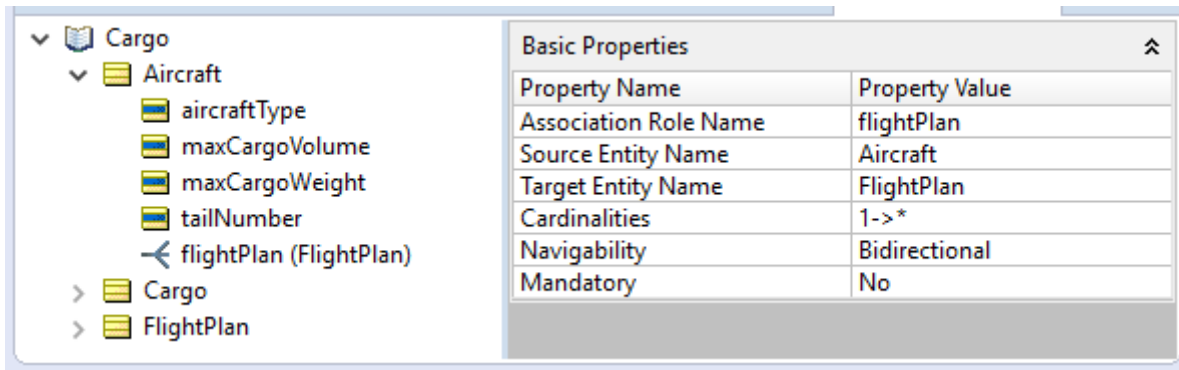
- Choose  from the toolbar.

3. Complete the Association window as shown in the following table:


| Property           | Value   |
|--------------------|---|
| Source Entity Name | An association relates two entities. Corticon Studio refers to one entity as the “source” and the other as the “target.” Choose the name of the supplier from the drop-down list, which includes the entity names already defined in this Vocabulary. |
| Target Entity Name | Choose the name of the second entity – the “target” entity – from the drop down list.   |

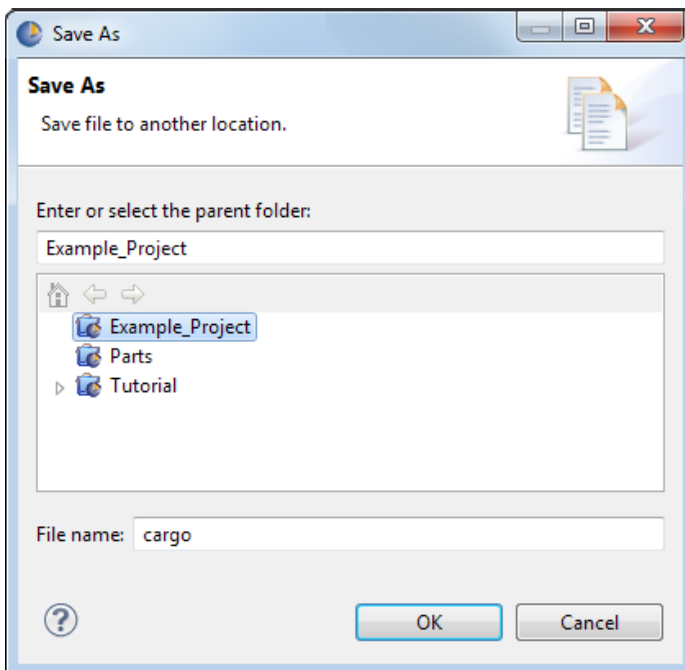
| Property                  | Value   |
|---------------------------|---|
| Cardinality Radio Buttons | Select the combination of radio buttons that describe the relationship you want between the two entities. The possible combinations are:  |
|                           | <b>One-To-Many</b> . This is the default and is shown as 1>* in the properties. This means that a given instance of the supplier entity may be related to multiple instances of the target entity. Displays as: ↖   |
|                           | <b>One-To-One</b> . Shown as 1>1, it means that a given instance of the supplier entity may be related to a single instance of the target entity. Displays as: —  |
|                           | <b>Many-To-One</b> . Shown as *>1, it means that multiple instances of the supplier entity may be related to a single instance of the target entity. Displays as: ↗   |
|                           | <b>Many-To-Many</b> . Shown as *>*, it means that multiple instances of the supplier entity may be related to multiple instances of the target entity. Displays as: ✕   |
|                           | <b>Mandatory</b> . Also known as optionality. Select this box if <i>at least one</i> instance of the source or target MUST be present in data sent to the Corticon Server to be processed by rules using this Vocabulary.   |
| Role Names                | <p>Role names are useful when two entities share more than one association. Custom role names can give each association a unique, descriptive name.</p> <p><b>Source-To-Target</b> provides a name for the association from the perspective of the source entity.</p> <p><b>Target-To-Source</b> provides a name for the association from the perspective of the target entity.</p>   |
| Navigability              | <p><b>Bidirectional</b>. Select Bidirectional if you want the association to be traversable (visible) in both directions within the Vocabulary. This means that associations between two entities are visible from each entity in the Vocabulary tree view. This option provides the most flexibility when writing rules.</p> <p><b>Source Entity &lt; Target Entity</b>. Use this option to prevent the association <i>from</i> the Target entity <i>to</i> the Source entity from being displayed in the Vocabulary tree view. This option prevents a rule from being written using the scope <code>Target_entity.source_entity.attribute</code>.</p> <p><b>Source Entity &lt; Target Entity</b>. Use this option to prevent the association <i>from</i> the Source entity <i>to</i> the Target entity from being displayed in the Vocabulary tree view. This prevents a rule from being written using the scope <code>Source_entity.target_entity.attribute</code>.</p> <p>See the <i>Rule Modeling Guide</i> for more information on using associations in rule modeling.</p> |

To edit an association, click on it in the Vocabulary, and then change the property values in the right panel, as illustrated:



## How to save a new Vocabulary

- Do one of the following:
  - Save the Vocabulary from the toolbar or choose **File > Save** from the menubar to save any changes you have made.
  - Use **File > Save As** on the menubar and Navigate to the directory where you want to store the Vocabulary, or click  to create a new directory.



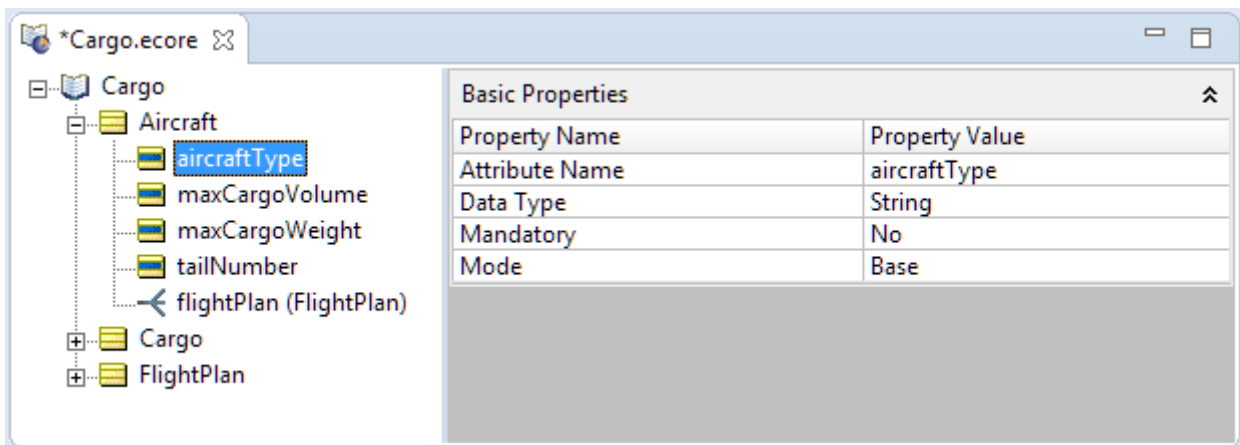
- Type any name, including embedded blanks (max. of 36 characters) in length, and click **OK**.
- See [File Naming Restrictions](#) for naming restrictions.

## How to open an existing Vocabulary

1. Choose **File > Open File** from the Corticon Studio menubar or use the toolbar to display the **Open** window.
2. Navigate to the directory where the Vocabulary you want is stored.
3. Select the appropriate `.ecore` file and click **Open**.

## How to modify a Vocabulary

1. Choose the **Vocabulary Editor** tab to enter the Vocabulary editor.
2. Select the node you want to edit to display its properties, as shown:



3. Modify the properties with the following considerations:
  - It is a good idea to close any open editors for Rulesheets, Ruleflows and Ruletests in the project before changing the Vocabulary.
  - When modifying an entity, attribute, or association's properties in the Vocabulary -- such as changing the data type of an attribute -- consider the impact in conditions and actions in the project's Rulesheets, as well as in Ruleflows and Ruletests.
  - *Renaming* an entity, attribute, or association does not automatically perpetuate to the project's Rulesheets, Ruleflows and Ruletests; therefore, renaming should be avoided or performed very carefully. When you use *refactoring* instead, the changes are evaluated and changed throughout the project.
  - Deleting an entity, attribute, or association from the Vocabulary can impact conditions and actions in the project's Rulesheets, as well as Ruleflows and Ruletests. When reviewing Rulesheets after a Vocabulary deletion, choose **Advanced** view to reveal any lingering references to the deleted items in the **Scope** section.
  - After editing the vocabulary, save it before opening other editors. Then open the project's Rulesheets, Ruleflows and Ruletests to expose errors that might have resulted from the changes made to the Vocabulary.

## How to create a Vocabulary report

1. With the Vocabulary you want to report open as the current window, choose the menu command **Vocabulary > Report**.

The **Generate Report** dialog opens.

2. Choose the **Report Type**, **Report Style**, and **Output Folder** for this report.
3. Click **Finish**.
4. The basic and detailed reports are saved as the `<project name>+<asset name>_<report type>` in the output folder as both HTML and XML, and then the HTML is opened in your default web browser. A complexity report is saved as a `.csv` file in the specified output folder.

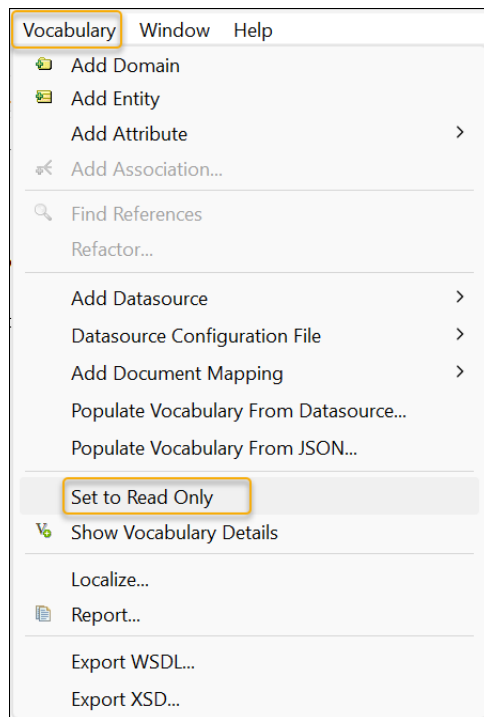
The default CSS and XSLT files are samples that you can customize to suit your preferences.

## How to lock and unlock Corticon Vocabularies

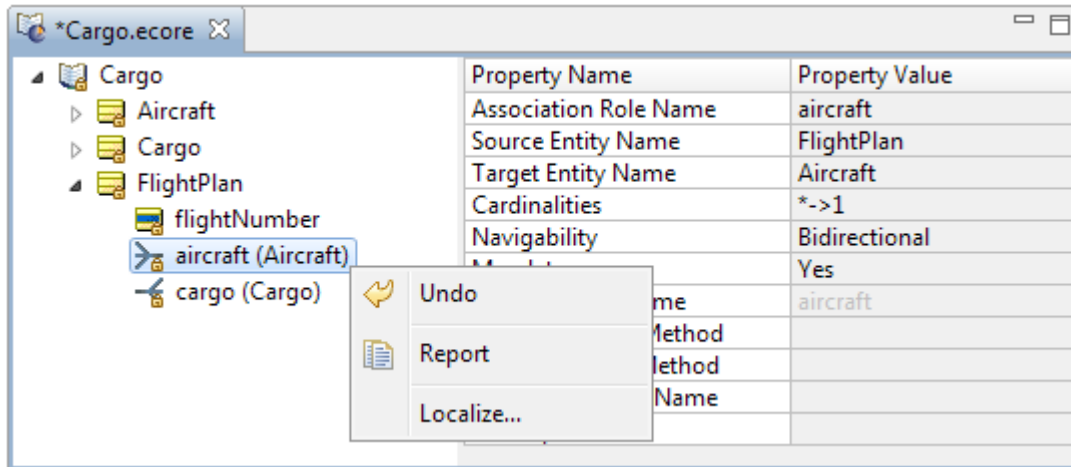
There are advantages to locked and unlocked Vocabularies:

- When your rule development has many Rulesheets and Rul-tests, you might want to add a measure of control over Vocabulary changes. Locking the Vocabulary prevents you from accidentally changing an entity or attribute, thereby invalidating rules and calls from databases.

You can choose to lock a Vocabulary in Studio by selecting the **Set to Read Only** option, as shown:



Once locked, all the icons in the Vocabulary display a padlock symbol.



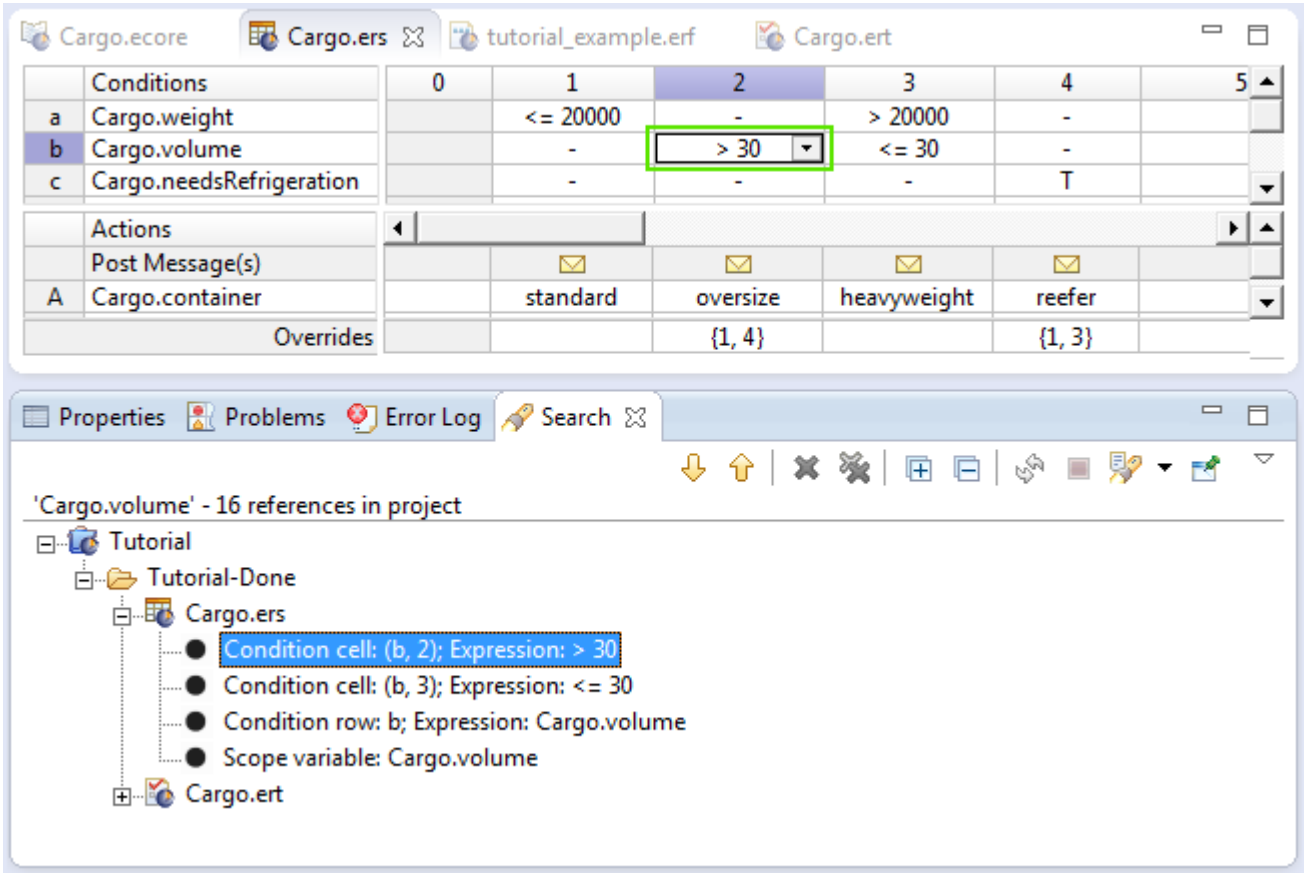
In a locked Vocabulary, all functions in the Vocabulary editor are display-only, including Custom Data Types and Database Access. **Undo** (and **Redo**) options will toggle the mode until the Vocabulary file is saved.

A locked Vocabulary can be unlocked by selecting the **Set to Read/Write** option.

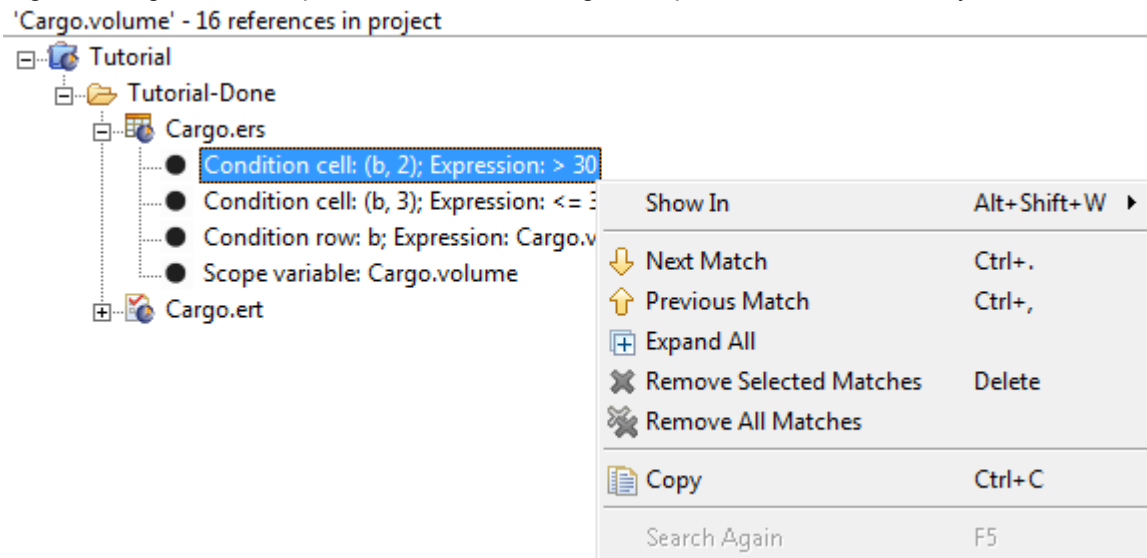
## How to find references to an entity, attribute, or association in a project

When working on large projects with many assets, it is a real convenience to find everywhere an entity, attribute, or association is referenced in the project. This feature reveals the vocabulary item's usage and impact, and lets you easily navigate to each instance. Just right-click on an entity, attribute, or association name in the Vocabulary editor, and then choose **Find References** to initiate a search.

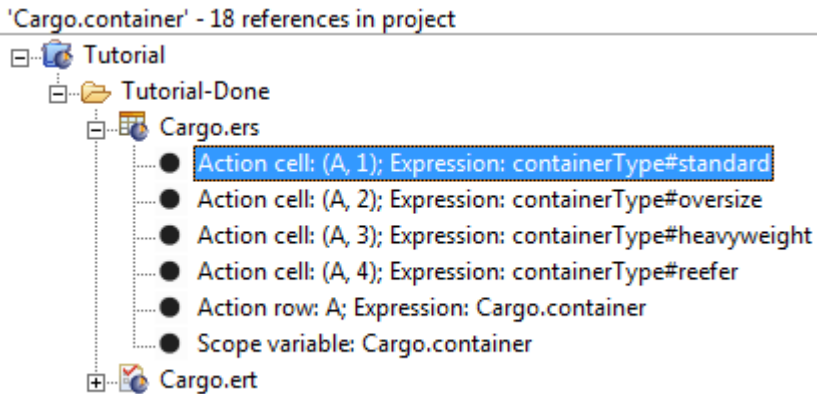
The search examines all Rulesheets, Ruleflows, and Ruletests in the project, then lists each match within each asset. Double-clicking on a match opens the asset and puts the focus at that location, as shown:



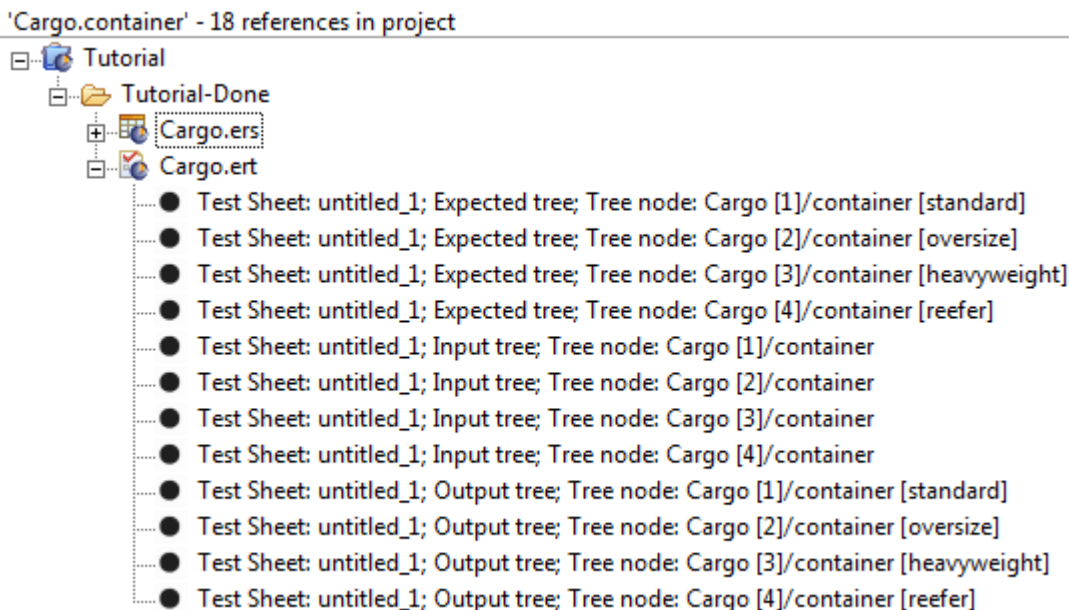
Right-clicking on a match presents a menu of navigation options as well as their keyboard shortcuts, as shown:



When the attribute is a custom data type, the search results indicate the Data Type Name and value, as shown:



When results are in Ruletests, the results detail the testsheet, tree, and node, as shown:



## How to refactor entity attribute or association names in a project

As your Corticon projects evolve, you might have need to change the name of some entities, attributes, and associations to better describe their meaning.

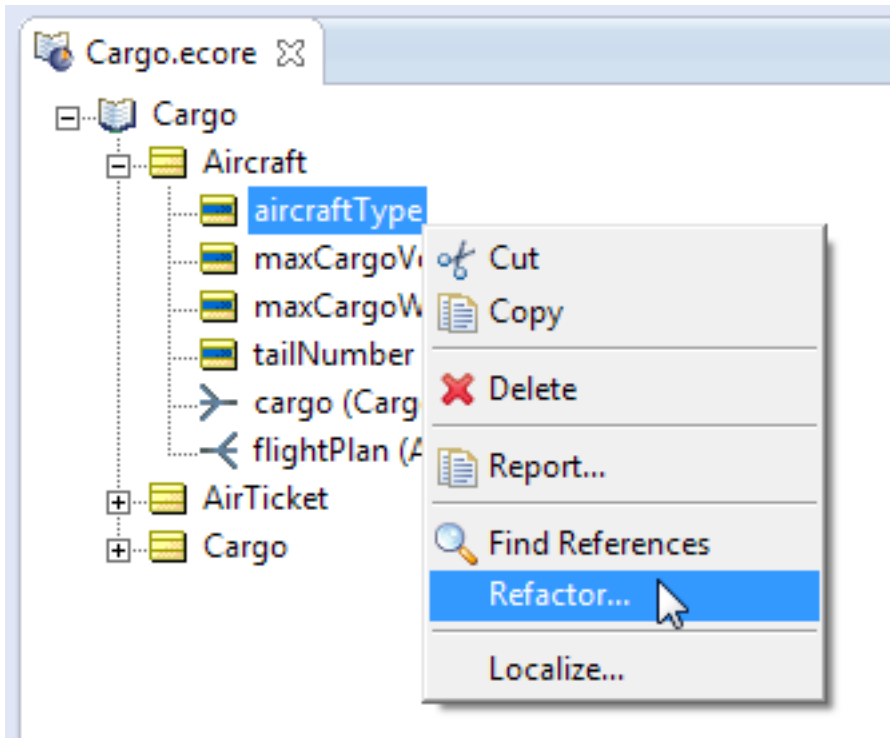
To avoid time consuming manual work and automate a potentially tedious process, Corticon lets you *refactor* the name of an entity, attribute, or association so that each change is automatically applied to all instances of the name in all assets in the project.

How does refactoring differ from renaming? When you *rename* a vocabulary element, only the vocabulary changes while the project assets that use that element are not updated, and will likely become invalid. But when you *refactor* the name of a vocabulary element, Corticon Studio updates all the Rulesheets, Ruleflows, and Ruletests which use that element, and maintains the validity of your project.

**Note:** Backup the project's rule assets before refactoring the Vocabulary since refactoring modifies and automatically saves rule assets.

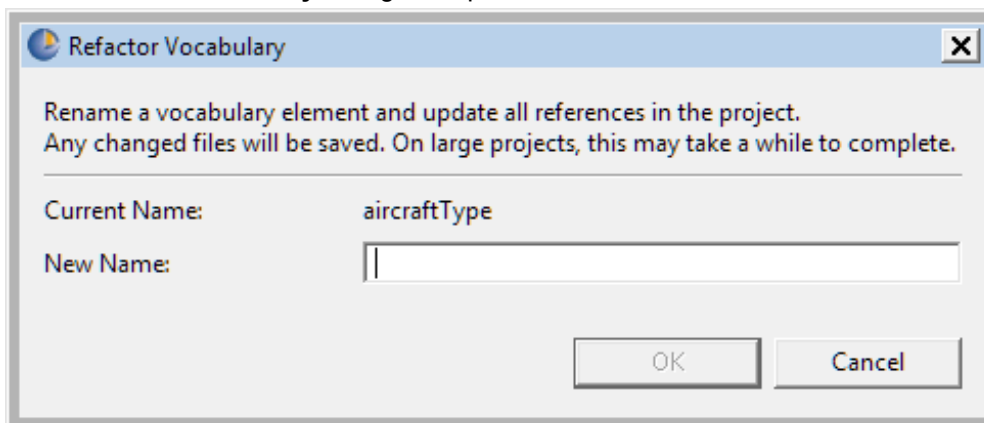
To refactor an entity, attribute, or association name, do the following:

1. Open the project's Vocabulary.
2. Click on the name you want to change and highlight it.
3. Either right-click on the item to choose **Refactor** in the context menu:

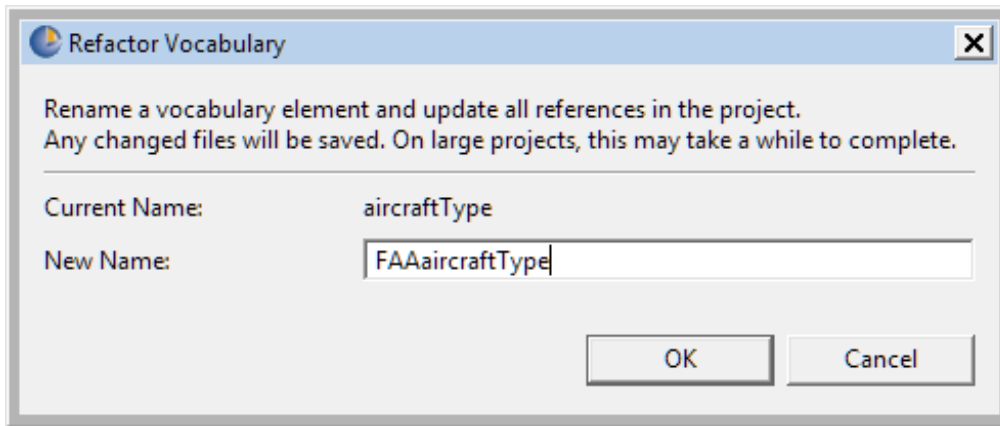


or choose the menu action **Vocabulary > Refactor**.

4. The **Refactor Vocabulary** dialog box opens for the selected item:



5. Type in a preferred name, and then click **OK**:



The change is applied throughout the project, and then all the changed files in the project are saved.

If **Refactor** determines the new name you have entered is currently used by another attribute in the entity, or currently used in the parent entity name, the name is disallowed and the **OK** button is disabled. When this occurs, type a new unused name in the **Refactor Vocabulary** dialog box and select **OK**.

---

**Note:** **CTRL-Z** or **Undo** options are unavailable. To revert a refactored name to the original value, use the **Refactor** feature again and change the name back.

---

### Important: Allow the process to finish

Refactoring on a large project might take a minute or more. Although an automated process, refactoring is a non-trivial operation that requires parsing all dependent assets to properly perform the changes. The refactoring process first searches the assets and locates where entities, attributes, and associations are used. Then it replaces the old term with a new term at each location.

While processing, **Refactor** blocks use of the UI to prevent other edits to be performed. This avoids any possibility of the renaming operation undoing simultaneous edits made by users, or encountering other concurrency issues.

Also, any unsaved changes in other open editors are saved by the refactoring process.

---

**Note:** Do not cancel the refactoring process once started, to do so could leave the assets in an invalid state as some of the files would be updated but not all of them.

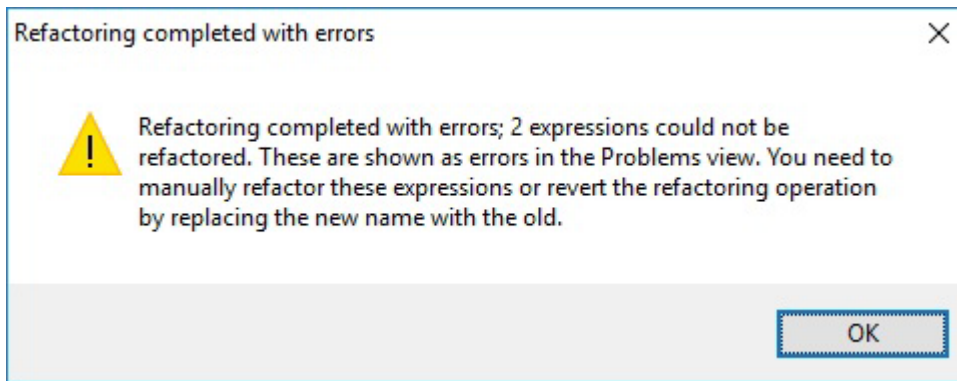
---

### Important: Expressions that cannot be refactored

Within a Rulesheet, there are a small number of expression types that cannot be refactored automatically:

- When two entities have an attribute with the same name and the expression assigns the value of one attribute to the other. For example: `A.name = B.name`
- When entities and attributes share the same name. For example: `Name.name`
- When an entity would be refactored to the same name as an existing alias in a Rulesheet. **Refactor** detects when this can occur, stops the operation, and displays a message recommending a new name be chosen for the entity, or a Rulesheet alias be changed.
- Inherited attributes and associations. For more information about inheritance, see *"Support for Inheritance" in the Rule Modeling Guide*.

If expressions that cannot be refactored are encountered, the **Refactor** operation still continues to refactor other expressions until the operation is finished. The expressions that could not be refactored are left unchanged and flagged as errors in the **Problems** view, and an alert is given as shown:



To update those expressions correctly, review the list of errors in the **Problems** view, and manually edit the Rulesheets accordingly.



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# Rulesheets

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A Rulesheet is a file that contains a set of business rules. By organizing these rules, it becomes a self-contained, independent unit of automated decision-making. A Rule Project can include any number of Rulesheets.

Following test and validation, one or more Rulesheets may be assembled in a Ruleflow (see the [Ruleflow](#) chapter), packaged as a Decision Service, and deployed into a production environment (described in the *Deployment Guide*).

Because a Rule Project may contain multiple Rulesheets, there are two methods of navigating between open Rulesheets within Corticon Studio:

- Double-clicking on any Rulesheet name in the **Project Explorer** window opens that Rulesheet and makes it active.
- Clicking on any Rulesheet tab makes that Rulesheet active.

Multiple Rulesheets may be open in Corticon Studio simultaneously, although only one may be active at any given time.

A Rulesheet file has the suffix `.ers`.

## Rulesheet Window

Opening a Rulesheet or making a Rulesheet the active Corticon Studio window causes the Studio menubar and toolbar to display the tools needed to begin working with rules.

For details, see the following topics:

- [Use AI Assistant in a Rulesheet](#)
- [How to create a Rulesheet](#)
- [Rulesheet menu commands](#)

- [Rulesheet toolbar](#)
- [Hover help in a Rulesheet](#)
- [Commands on the Rulesheet context-sensitive menu](#)
- [Rulesheet sections](#)
- [Navigation in a Rulesheet](#)
- [Rule statements window](#)
- [Rulesheet properties](#)
- [Use the business vocabulary to build rules](#)
- [Use the operator vocabulary to build rules](#)
- [Create rules by importing an Excel worksheet](#)
- [How to name Rulesheets](#)
- [How to validate and optimize a Rulesheet](#)
- [How to create a Rulesheet report](#)
- [How to save a new Rulesheet](#)
- [How to save a modified Rulesheet](#)
- [How to close a Rulesheet](#)
- [How to delete Rulesheets](#)

## Use AI Assistant in a Rulesheet

The Corticon AI Assistant can help you explore, understand, and create rule assets directly in Corticon Studio. You can ask questions, generate documentation, create or test rules, and more—all from within the Assistant panel. See *Using the Corticon AI Assistant in this guide* for details.

## Use AI Assistant to generate rules

### Writing Rules with Plain Text Instructions

You can create business rules by simply describing your requirements in **plain text**. The AI Assistant reads your statement, interprets its meaning, and generates one or more corresponding rules in your rulesheet—based strictly on the vocabulary available in your model.

For example:

- Open the rulesheet where you want to add rules.
- Enter a plain text instruction such as:  
*“Drivers over 65 who drive less than 50 miles per week get a 10% discount.”*
- Click **Send**. The Assistant will convert your description into rule logic using your rulesheet’s vocabulary.

You may also copy and paste requirements from documents, emails, or specifications. The Assistant supports all languages supported by your AI provider, so you may write your instructions in any preferred language.

**Tips for best results:**

- Define and review your vocabulary (entities, attributes, values) before writing rules.
- Be clear and specific in your statements.

**Creating Rules from Code Snippets**

If your logic is already written in code, you can paste code snippets directly into the Assistant. The AI will extract the business logic from the code and express it as rules, using the vocabulary available in your rulesheet.

**To use code snippets:**

- Open the relevant rulesheet.
- Paste your code snippet into the AI Assistant's panel.
- Click **Send**. The Assistant will translate the code into rules you can review and use.

This workflow helps translate technical logic into business-friendly rule models.

**Working Within Your Vocabulary**

The AI Assistant only generates rules using the entities and attributes defined in your rulesheet's vocabulary:

- If your plain text or code refers to terms not present in the vocabulary, the Assistant will use the closest available options or may be unable to proceed.
- For best results, review and clarify your vocabulary first so your plain text instructions match what's available.

**Fixing Errors and Troubleshooting**

When issues or errors are present in your rulesheet, the AI Assistant can help you quickly understand and resolve them:

- Select the "Assist with errors" prompt if errors are detected.
- The Assistant will explain each error and offer step-by-step suggestions to fix them.

This makes error correction easier for everyone, regardless of their technical background.

**Working in Any Language**

You can use the Corticon AI Assistant in any language supported by your chosen AI provider (OpenAI or Azure OpenAI). Type your plain text instructions, questions, or requests in your preferred language—the Assistant will respond in the same language. This supports collaboration across teams and regions.

**Helpful Tips for Effective Use**

- **Be descriptive and specific:** Well-defined statements and questions yield more accurate results.
- **Always validate output:** Review and test all generated rules and explanations before using them in production.
- **Try different approaches:** If you don't get the answer you expect, rephrase your instruction or add more detail.
- **Easy copy and paste:** Assistant responses can be copied into your rulesheet or documentation.
- **Request alternate formats:** Ask for responses as plain text, HTML, or JSON when needed.

- **Each interaction is independent:** The Assistant does not remember previous prompts, so include all necessary details each time.

## Use AI Assistant to explain errors

### Writing Rules with Plain Text Instructions

You can create business rules by simply describing your requirements in **plain text**. The AI Assistant reads your statement, interprets its meaning, and generates one or more corresponding rules in your rulesheet—based strictly on the vocabulary available in your model.

For example:

- Open the rulesheet where you want to add rules.
- Enter a plain text instruction such as:  
*“Drivers over 65 who drive less than 50 miles per week get a 10% discount.”*
- Click **Send**. The Assistant will convert your description into rule logic using your rulesheet’s vocabulary.

You may also copy and paste requirements from documents, emails, or specifications. The Assistant supports all languages supported by your AI provider, so you may write your instructions in any preferred language.

### Tips for best results:

- Define and review your vocabulary (entities, attributes, values) before writing rules.
- Be clear and specific in your statements.

*Image placeholder: “Example of a Plain Text Statement and Resulting Rules in the Assistant Panel”*

[Image 4]

### Creating Rules from Code Snippets

If your logic is already written in code, you can paste code snippets directly into the Assistant. The AI will extract the business logic from the code and

et.

### To use code snippets:

- Open the relevant rulesheet.
- Paste your code snippet into the AI Assistant’s panel.
- Click **Send**. The Assistant will translate the code into rules you can review and use.

This workflow helps translate technical logic into business-friendly rule models.

*Image placeholder: “Panel with Pasted Code and Extracted Rule Preview”*

[Image 5]

### Working Within Your Vocabulary

The AI Assistant only generates rules using the entities and attributes defined in your rulesheet’s vocabulary:

- If your plain text or code refers to terms not present in the vocabulary, the Assistant will use the closest available options or may be unable to proceed.
- For best results, review and clarify your vocabulary first so your plain text instructions match what's available.

*Image placeholder: "Sample Vocabulary and the AI Assistant's Use of Defining Entities"*  
express it as rules, using the vocabulary available in your rulesheet *Entities*"

*[Image 6]*

### Fixing Errors and Troubleshooting

When issues or errors are present in your rulesheet, the AI Assistant can help you quickly understand and resolve them:

- Select the "Assist with errors" prompt if errors are detected.
- The Assistant will explain each error and offer step-by-step suggestions to fix them.

This makes error correction easier for everyone, regardless of their technical background.

*Image placeholder: "Error Description and Suggested Fixes in the Assistant Panel"*

*[Image 7]*

### Working in Any Language

You can use the Corticon AI Assistant in any language supported by your chosen AI provider (OpenAI or Azure OpenAI). Type your plain text instructions, questions, or requests in your preferred language—the Assistant will respond in the same language. This supports collaboration across teams and regions.

*Image placeholder: "Prompt and AI Response in a Non-English Language"*

*[Image 8]*

### Helpful Tips for Effective Use

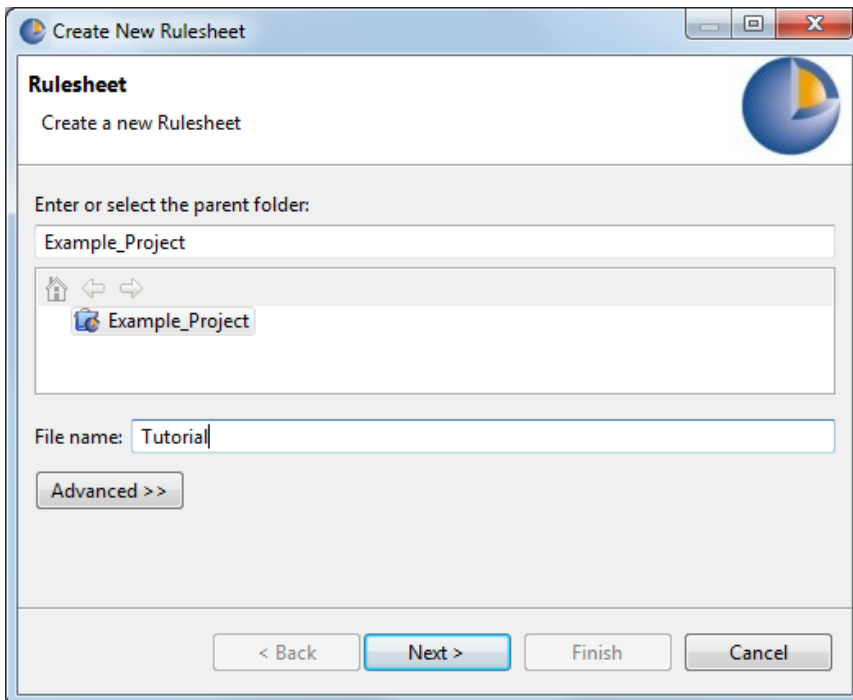
- **Be descriptive and specific:** Well-defined statements and questions yield more accurate results.
- **Always validate output:** Review and test all generated rules and explanations before using them in production.
- **Try different approaches:** If you don't get the answer you expect, rephrase your instruction or add more detail.
- **Easy copy and paste:** Assistant responses can be copied into your rulesheet or documentation.
- **Request alternate formats:** Ask for responses as plain text, HTML, or JSON when needed.
- **Each interaction is independent:** The Assistant does not remember previous prompts, so include all necessary details each time.

## How to create a Rulesheet

To create a Rulesheet:

1. Choose **File > New > Rulesheet** from the menubar or click the down arrow next to the **New** icon on the toolbar and select **Rulesheet**. Either method will launch the **Create a New Rulesheet** wizard.

The **Create New Rulesheet** dialog opens.



2. Highlight the Rule Project you would like to associate the new Rulesheet with in the list (or enter it manually in the **Enter or select parent folder** entry area.
3. Enter a file name for the Rulesheet in the **File name:** entry area.

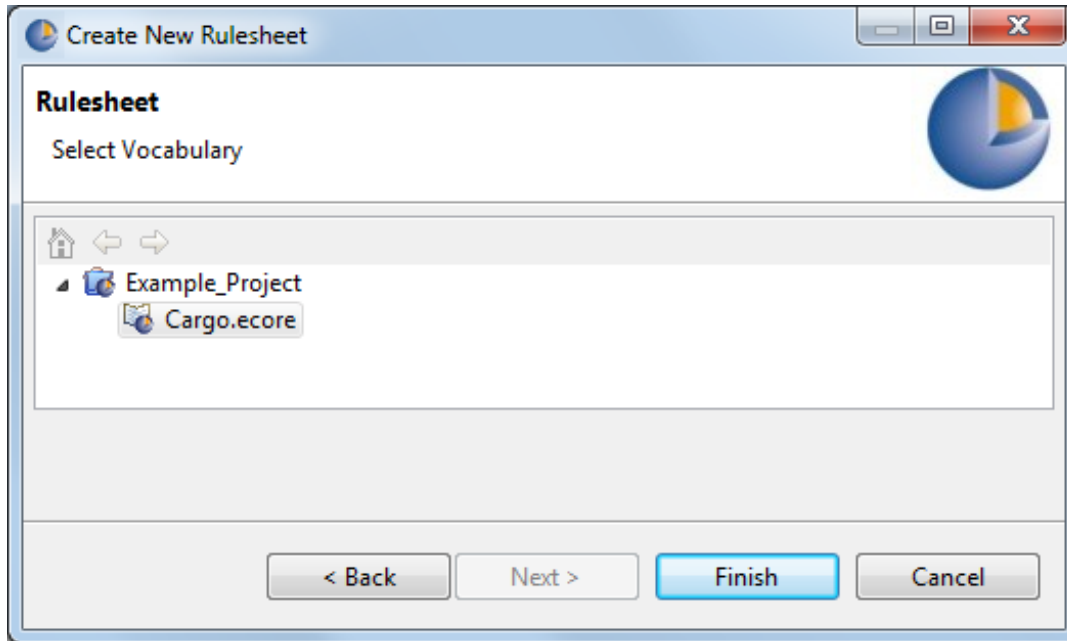
---

**Note:** The **Advanced** options are not relevant to Corticon and should not be used.

---

- Click **Next** to continue.

**Figure 1: The Create New Rulesheet Wizard window**



**Note:** The dialog only lists the Vocabularies for the parent project. This prevents you from creating cross-project assets. Do not create cross-project assets.

- Select the Vocabulary with which to associate the Rulesheet. A Rulesheet can only be associated with one Vocabulary. In this example, we expanded the `Example_Project` folder and chose the `Cargo.ecore` file we created earlier. As you create additional Vocabulary files within a Rule Project, they become available for selection from this list.

You must have a Vocabulary within a Rule Project to create a Rulesheet.

- Click **Finish**.

Your new Rulesheet is now listed in the **Project Explorer** window and in a new Editor window with a tab of the given name and the `.ers` extension. The Rulesheet menubar and toolbar replace the Vocabulary menubar and toolbar while the Rulesheet is the active window. You can now model your rules.

## Rulesheet menu commands

The following menu is available when the Rulesheet editor is the active window.

The **Rulesheet** menu has the following items:

- **Logical Analysis**
  - **Execution Sequence Diagram** —Creates a graphic that shows the execution sequence of the rules in the active Rulesheet. Your default graphic viewer launches to display the diagram. The graph is saved as a labeled set of files at `[CORTICON_WORK]\Graphs`.
  - **Logical Dependency Graph** —Creates a graphic that shows the logical dependencies of the data created in the Rulesheet. This is different than an Execution Sequence Diagram in that it does not show

the sequence of rule execution. Your default graphic viewer launches to display the diagram. The graph is saved as a labeled set of files at [CORTICON\_WORK]\Graphs.

- **Clear Analysis Results** —Removes highlighting that resulted from checking for conflicts and completeness.
- **Check for Logical Loops** —Performs logical loop detection across all rules in all Rulesheets in the active Project.
- **Check for Completeness** —Highlights incompleteness in the active Rulesheet.
- **Check for Conflicts** —Highlights conflict between two or more rules in the active Rulesheet.
- **Enable Conflict Filter** —A toggle that either hides or shows all rule columns that are not part of the current conflict.
- **Previous Conflict** —Highlights the previous conflict in the sequence. This option is grayed out until you perform a conflict check.
- **Next Conflict** —Highlights the next conflict in the sequence. This option is grayed out until you perform a conflict check.
- **First Conflict** —Highlights the first conflict in the sequence. This option is grayed out until you perform a conflict check.
- **Last Conflict** —Highlights the last conflict in the sequence. This option is grayed out until you perform a conflict check.
- **Rule Columns**
  - **Use Conditions as Processing Threshold** —Advanced functionality. For more information on this topic, see the section *"Rule dependency in chaining and looping" in the Rule Modeling Guide*.
  - **Expand Rules** —Creates multiple simple rules from each complex rule.
  - **Collapse Rules** —Reverses the Expand Rules function.
  - **Compress Rules** —Detects overlapping conditions between rules and combines columns to produce a smaller number, but logically equivalent, set of rule columns.
  - **Renumber Rules** —Causes rule columns that have been expanded into component rules (also called sub-rules) to be renumbered from left to right.
- **Simple View | Advanced View**—Toggles display of the Scope and Filters panels on the left side of the Rulesheet.
- **Show Vocabulary Details |Hide Vocabulary Details**—Toggles the associated Vocabulary to show or hide details.
- **Show Natural Language** —Displays the Condition and Action expressions in the Rulesheet that have natural language equivalents.
- **Filters**—For more information on filters and preconditions, see the topics in the section *"Filters and preconditions" in the Rule Modeling Guide*.
  - **Database Filter** —When EDC is enabled, this is a toggle that -- when cleared -- is a filter that is applied to the data currently in working memory. When checked, the filter is a database query that can retrieve data from the database, and add that data to working memory.
  - **Cache Query**—Enables caching on an Entity or database filter. This is independent of Datastore Caching.
  - **Precondition** —Preconditions are Filter expressions that stop Rulesheet execution if not satisfied by at least one piece of data. For more information, see the Filters chapter of the *Rule Modeling Guide*.








- **Processing Mode**—The selected option affects only the active Rulesheet. For more information on the processing mode options, see the topics in the section *"Rule dependency: Chaining and looping" in the Rule Modeling Guide*.
- **Optimized Inferencing**—Default selection. Causes rules to execute without re-evaluation or re-execution (no looping).
- **Advanced Inferencing**—Allows only multi-rule inter-dependencies to re-evaluate and re-execute.
- **Advanced Inferencing with Self-Triggering**—Allows all rule dependencies (including self-dependencies) to re-evaluate and re-execute.
- **Localize**—Opens the **Localization** view. For more information, see the topics at *"How to localize Corticon Studio" in this Guide*.
- **Report**—Creates an HTML report and launches your browser for viewing. See *"How to create a Rulesheet report" in this Guide*.
- **Compare Rulesheets**—Analyzes a selected Rulesheet in the context of the one currently in the editor to report on differences.

## Rulesheet toolbar

When a Rulesheet editor is active, its tools are added to the toolbar, as shown:



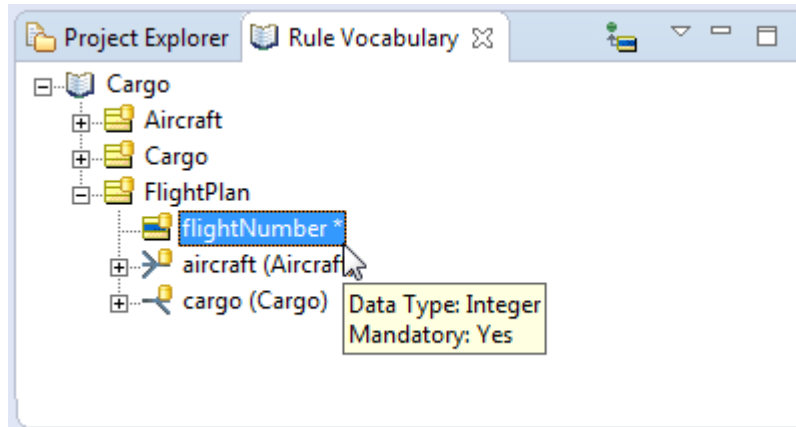
The Rulesheet tools provide the same functions as the corresponding **Rulesheet** menu commands:

-  **Simple View**  **Advanced View** - Toggles to the advanced or simple Rulesheet views. New Rulesheets are shown in Simple view.
-  **Show Vocabulary Details**  **Hide Vocabulary Details** - Toggles the associated Vocabulary to show or hide details.
-  - Switches the view of the active Rulesheet to **Natural Language View**. See the *Rule Modeling Guide* for more information about this feature.
-  - Presents the **Add Comment** dialog. The comments you enter and all associative information are captured and displayed in the **Comments View**. See the *Documenting Rule Assets* section for more information about this feature.
-  - Expands conditions and actions to display all component rules (those containing no dashes). Same as menu command **Rulesheet > Rule Column(s) > Expand Rules**.

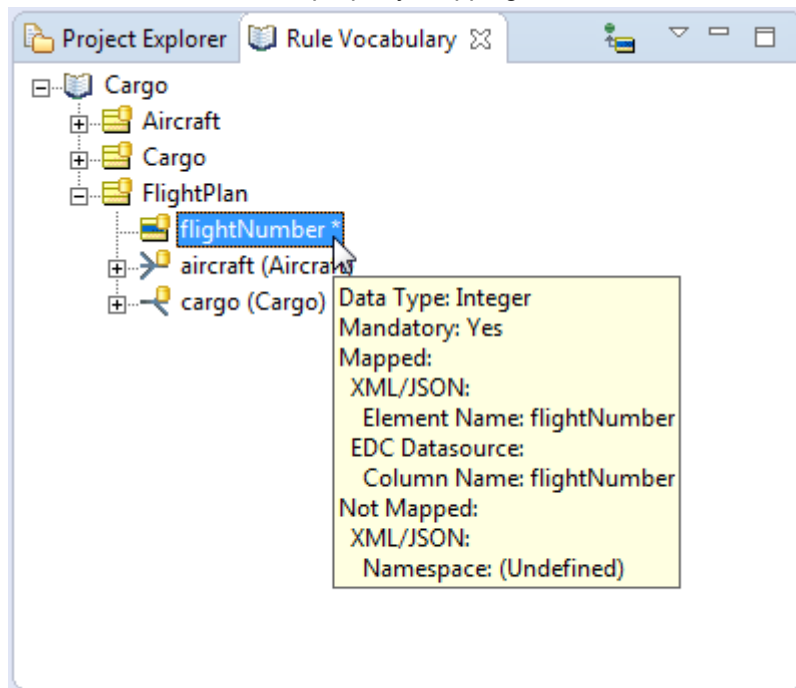
-  - Collapses conditions and actions to hide component rules and show only general rules (those containing dashes). Same as menubar option **Rulesheet > Rule Column(s) > Collapse Rules**.
-  - Compresses conditions and actions to eliminate redundancies within general and component rules. Same as menu command **Rulesheet > Rule Column(s) > Compress Rules**.
-  - Clears the colored highlights that appear when an conflict or completeness check is performed. Same as menu command **Rulesheet > Logical Analysis > Clear Analysis Results**.
-  - Performs logical loop detection. Same as menu command **Rulesheet > Logical Analysis > Check for Logical Loops**.
-  - Performs completeness check. Same as menu command **Rulesheet > Logical Analysis > Check for Completeness**.
-  - Performs conflict check. Same as menu command **Rulesheet > Logical Analysis > Check for Conflicts**.
-  - Highlights the first conflict in a set. This button is grayed out until you perform a conflict check. Same as menu command **Rulesheet > Logical Analysis > First Conflict**.
-  - Highlights the previous conflict in a set. This button is grayed out until you perform a conflict check. Same as menubar option **Rulesheet > Logical Analysis > Previous Conflict**.
-  - Highlights the next conflict in a set. This button is grayed out until you perform a conflict check. Same as menubar option **Rulesheet > Logical Analysis > Next Conflict**.
-  - Highlights the last conflict in a set. This button is grayed out until you perform a conflict check. Same as menubar option **Rulesheet > Logical Analysis > Last Conflict**.
-  - Enables the conflict Filter, which hides all rule columns not part of the current conflict. This feature is a toggle – the filter is *disabled* when the red funnel icon is *visible*. Same as menubar option **Rulesheet > Logical Analysis > Conflict Filter**.
-  - Once enabled, the conflict Filter icon appears like this. Same as menubar option **Rulesheet > Logical Analysis > Conflict Filter**. Click to disable.

## Hover help in a Rulesheet

When you hover the cursor over a Vocabulary element, Hover Help provides information about that element, as illustrated:

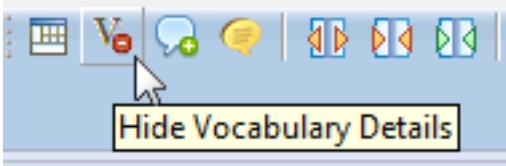


When you add Datasources and document mapping, details about the selected element in each additional mapping can display in the Hover Help, as illustrated showing the details of the XML/JSON mapping option and the EDC Datasource property mapping:



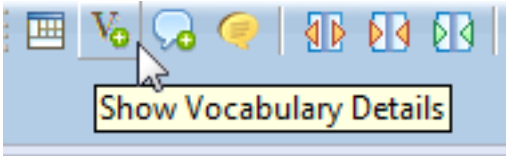
You can control whether the Hover Help displays the defined Datasources and document mapping for the selected element:

- On the currently active menu/toolbar, the **Hide Vocabulary Details** button displays a minus sign:



When you click it, the Hover Help will show only Basic Properties.

- Then, when you want Hover Help to display details about defined Datasources and document mapping for the selected element, click the **Show Vocabulary Details** button.



---

**Note:** If you have not defined any Datasources or document mappings for the selected element, the **Show/Hide** option has no effect.

---

## Commands on the Rulesheet context-sensitive menu

In addition to the menubar and toolbar functions described above, Corticon Studio also provides many functions in a right-click pop-up menu. A Rulesheet context-sensitive menu opens when a section in a Rulesheet is right-clicked. Its menu provides access to Rulesheet functions relevant in the context of the sections or items where it was accessed.

| Commands   | Description   |
|--|---|
| Undo / Redo  | Undo reverts from the previous action. Redo restates an action that was undone.   |
| Cut / Copy / Paste                                 | In any section, performs these standard edit functions.   |
| Select All   | In all sections except the Scope, selects all active rows (and columns) in the Rulesheet section in which the menu was activated.   |
| Disable / Enable                                   | On any area except Vocabulary elements, <b>Disable</b> greys out one or more selected entries / lines / columns / cells so that they are virtually deleted. Selecting one or more disabled items lets you <b>Enable</b> them again.   |
| Insert Row / Remove Row / Add Rows to End          | Adds or deletes rows. Adds ten rows the bottom of the current set in the Rulesheet section in which the menu was activated.   |
| Insert Column / Remove Column / Add Columns to End | Adds or deletes rows. Adds ten columns to the right of the current set.   |
| Comments ...                                       | Presents the <b>Add Comment</b> dialog. Any comments you enter and all associated information is captured and displayed in the <b>Comments View</b> . See the <a href="#">How to document rule assets</a> on page 161 section for details of this feature.  |
| Localize   | Opens the <b>Localization</b> view. The menu command <b>Rulesheet &gt; Localize</b> performs the same operation. For more information, see the topic <a href="#">How to localize Corticon Studio</a> on page 167.   |
| Natural Language                                   | Opens the <b>Natural Language</b> view. The menu command <b>Rulesheet &gt; Show   Hide Natural Language</b> is a toggle that displays the natural language entries in the Rulesheet without opening the Natural Language window. For more information, see the topic <i>"How to work with rules and filters in natural language" in the Rule Modeling Guide</i> . |

## Rulesheet sections

The Rulesheet window is divided into several sections, each with a specific use in creating business rules.

### Rules

This section of the Rulesheet organizes Conditions, Values and Actions in a table format.

| Conditions |              | 1                | 2     |
|------------|--------------|------------------|-------|
| a          | Cargo.weight | 150000 .. 200000 | -     |
| b          | Cargo.volume | -                | < 300 |
| c          |              |                  |       |
| d          |              |                  |       |
| e          |              |                  |       |

| Actions         |                 | <                                   | >                                   |
|-----------------|-----------------|-------------------------------------|-------------------------------------|
| Post Message(s) |                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| A               | Cargo.packaging | Container                           | Pallet                              |
| B               |                 |                                     |                                     |
| C               |                 |                                     |                                     |
| D               |                 |                                     |                                     |
| E               |                 |                                     |                                     |
| Overrides       |                 |                                     |                                     |

**Conditions** (quadrant 1) and **Actions** (quadrant 2) are organized in the decision table shown above. Sets of Conditions and Actions are tied together to form rules by the vertical columns spanning the two right quadrants (The first column is a special column reserved for 3 & 4) of this section.

The cells in a vertical rule column (highlighted in **blue**) specify the Condition rows which must be “satisfied” (determined by the cell values in quadrant 3) necessary to execute or “fire” the Action rows (determined by the cell values in quadrant 4).

The illustration above contains the model of the sample business rule: *if a cargo's weight is not between 150000 and 200000, and that cargo's volume is less than 300, then assign its packaging a value of Pallet.*

### Nonconditional Rules

The first column is a special column reserved for *nonconditional* rules, often referred to as *action-only* rules.

| Conditions |  | 0 |
|------------|--|---|
| a          |  |   |
| b          |  |   |

| Actions         |  | <                                   | > |
|-----------------|--|-------------------------------------|---|
| Post Message(s) |  |                                     |   |
| A               | Entity1.decimal1 = Entity1.decimal2.absVal | <input checked="" type="checkbox"/> |   |
| B               |  |                                     |   |
| Overrides       |  |                                     |   |

| Ref | ID | Post | Alias | Text   |
|-----|----|------|-------|--|
| A0  |    |      |       | decimal1 equals the absolute value of decimal2 |

Column 0 is special because the Conditions rows are grayed-out and unusable. Expressions may only be modeled in the Action rows.

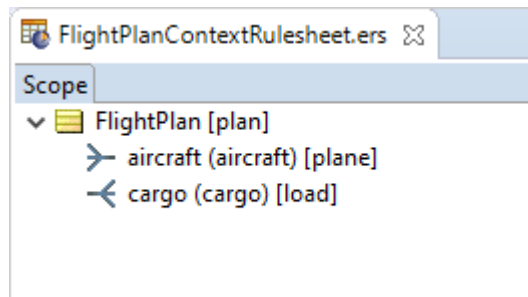
Logically, this means that all Actions modeled in Column 0 are unconditionally executed. In other words, no Conditions must be satisfied in order for these Actions to execute.

Each Action row in Column 0 acts as a separate, independent rule. Each Action row constitutes a separate Nonconditional rule.

## Scope and Filters in the Advanced View

When the **Advanced View** is selected, the Scope and Filter sections for the current Rulesheet are displayed.

**Figure 2: Scope section, showing an Entity and its alias**



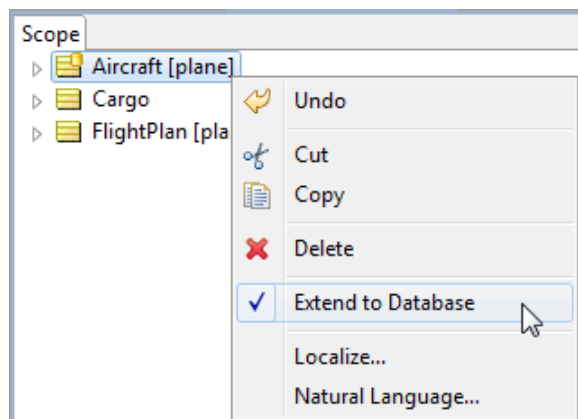
The **Scope** section provides a reduced set of Vocabulary terms with which to build a **Rulesheet**.

The Scope section can be populated *directly* by dragging and dropping Vocabulary elements into it, or *indirectly*, by dragging and dropping Vocabulary nodes onto other Rulesheet sections.

Once a node is visible in the Scope section, it can be dragged and dropped to other Rulesheet sections henceforth.

For those Entities in the Scope section, aliases and associations can be defined by double-clicking the Entity to open an edit box. An alias replaces the fully qualified entity name wherever it is used in the Rulesheet, and serves as a sort of local name for use in that Rulesheet only. When an entity has been set to **Datastore Persistent** in the Vocabulary's details view, it is decorated with a database symbol. In the Rulesheet, that means you provide an alias and then set the entity to **Extend to Database**, as shown:


**Figure 3: Setting an alias in scope to Extend to Database**

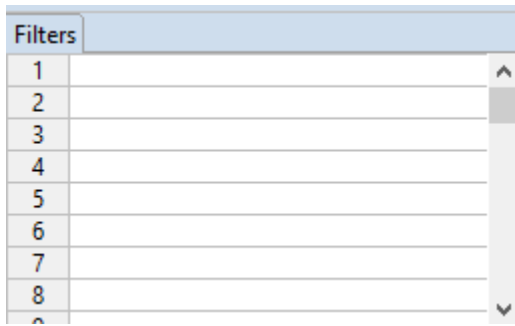


**Note:** For more information about **Extend to Database**, see the "Writing Rules to access external data" section of the *Rule Modeling Guide* and the "Advanced EDC" topics of the *Data Integration Guide*.

See the *Rule Modeling Guide* for details on scope, context and Rulesheet aliases.

## Filters

This section is visible only when the **Advanced View** is toggled (the button  on the Corticon Studio toolbar.)



| Filters |  |
|---------|--|
| 1       |  |
| 2       |  |
| 3       |  |
| 4       |  |
| 5       |  |
| 6       |  |
| 7       |  |
| 8       |  |
| ...     |  |

Filters are boolean expressions - they are either `TRUE` or `FALSE` - that are applied to data before rule columns are evaluated. Before using this section, we recommend reading the “Filters” chapter of the *Rule Modeling Guide*.

## Navigation in a Rulesheet

### Mouse navigation

All general mouse functions are supported:

- Click on a cell to select it.
- Double-click on a cell to enter edit mode with the cursor at the location you clicked in the line.
- Click to open a selected cell's dropdown menu, and then click on the preferred value in the list.
- Use the scroll wheel to move up and down the rows in the selected section.

.

### Keyboard navigation

The Rulesheet window enables navigation through several common keyboard shortcuts in its *cell-style* sections -- all the sections except Scope:

- Conditions and their cells
- Actions and their cells
- Filters
- Rule Statements and their columns

Keyboard shortcuts on a Rulesheet:

- Move up: Up-arrow
- Move down: Down-arrow, or Enter
- Move right: Right-arrow, or Tab
- Move left: Left-arrow, or Shift+Tab
- Edit content of the cell in focus: Backspace (places the cursor at end of entry)
- Clear content of the cell in focus, and then add content: Spacebar
- Beginning of line in edit mode: Home
- End of line in edit mode: End

---

**Note: Nonconditional actions** - In a column 0 value on an Action line, Backspace and Spacebar both toggle the current selection.

---

## Rule statements window

The **Rule Statements** window displays a list of natural language statements which describe the rules modeled in the Rulesheet. The Rule Statements window has several columns:

| Ref | ID | Post | Alias | Text   |
|-----|----|------|-------|--|
| 1   |    | Info | Cargo | Cargo weighing between 150000 and 200000 kilograms must be packaged in a container |
| 2   |    | Info | Cargo | Cargo with a total volume less than 300 cubic meters must be packaged on a pallet  |

**Rule Statements** serve as documentation or elaboration on the meaning and intent of business rules modeled in the Rulesheet. Linking the plain-language *description* of a business rule in the Rule Statement section to its formal *model* in the other sections can provide important insight into rule operation during testing and deployment. Here, rule statement #2 is an informal description of the rule logic modeled in the Rulesheet column #2, as shown above.

When a Rule Statement row is clicked, the corresponding Columns or Action rows will highlight in **orange** in the Rulesheet. When a Rulesheet column is selected, the corresponding Rule Statement will highlight in **orange**.

### Ref

This field is mandatory when linking Rule Statements to their Rulesheet columns (the rule models).

Rule Statements have a many-to-many relationship with Rulesheet columns. In other words, a Rule Statement may be reused for multiple Columns, and multiple Rule Statements may be expressed for a single Column. Entries in the **Ref** column serve to establish the relationship between the Rule Statements and Rulesheet columns. The various options are summarized below:

| Ref        | The Rule Statement is linked or connected to:         |
|------------|---|
| 1          | Column 1  |
| 1:3        | Columns 1,2 and 3                                     |
| { 1, 3 }   | Columns 1 and 3                                       |
| 0          | Column 0  |
| A0         | Action Row A in Column 0                              |
| B1         | Action Row B in Column 1                              |
| C1         | Action Row C in Column 1                              |
| A1:B2      | Action Rows A and B in Columns 1 and 2                |
| { A1, B2 } | Action Row A in Column 1 and Action Row B in Column 2 |
| 1:B2       | invalid   |
| A:2        | invalid   |

When a colon ( : ) character is used to indicate that a range of Action cells is linked to the Rule Statement, then the left-hand and right-hand sides of the : must have the same form: both [column][row], both [column], or both [row] values. When they do not, the values will turn **red**, as shown in the last two rows above.

### ID

Allows you to link Rule Statements to external source documentation using a code or ID number. This column is optional.

### Post

This field is mandatory if you want the Rule Statement to appear as a Rule Message during Rulesheet execution (called “posting” the Rule Statement). Three “severity” levels are available: **Info**, **Warning**, and **Violation**. These severity levels have no intrinsic meaning - you can use them however you want. In a Corticon Studio Ruletest, Rule Messages with Info severity are color-coded **green**, Warnings **yellow**, and Violations **red**.

### Alias

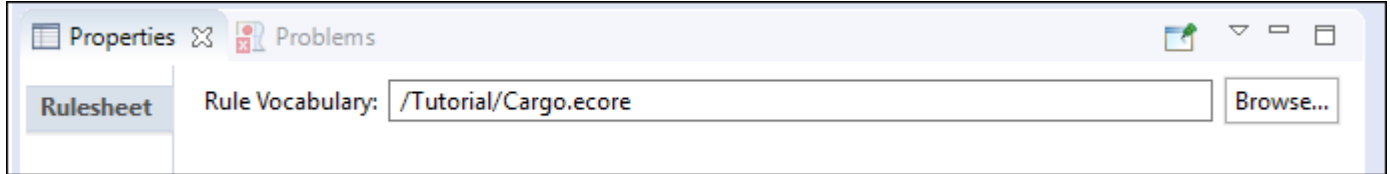
This field is mandatory if you want the Rule Statement posted during Rulesheet execution. All posted Rule Messages must be “attached” or “linked” to a Vocabulary entity. The choice of entity to “post to” is usually based on the entity being tested or acted upon in the associated rule.

### Text

Technically, this field is optional, but posting a Rule Statement with no text results in an empty Rule Message. In order to have a meaningful posted Rule Message, we recommend entering plain language business rule statement in this field. Even when you do not plan to post messages during Rulesheet execution, creating a clear, concise version of the rule model is considered a best practice in rule modeling.


## Rulesheet properties

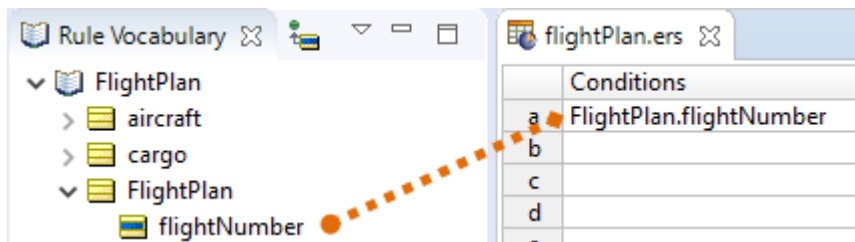
When you are editing a Rulesheet, the **Properties** tab's **Rulesheet** displays the Rule Vocabulary that supports this Rulesheet.



**Note:** A Rulesheet is tightly bound to its Vocabulary. While you are allowed to browse to select another Vocabulary, that action is reserved for advanced users who might be applying an updated version of the same Vocabulary, perhaps as carefully changed by a project collaborator.

## Use the business vocabulary to build rules

Select the **Rule Vocabulary** tab; click the  button beside an entity to expand the node & view its tree structure. Then, drag the specified term and drop it onto the Rulesheet.



**Important:** You can use either the **TAB** key to move from cell to cell within a row or the **ARROW** keys to move between rows within the Rulesheet grid. To move to another section in the Rulesheet, click on a cell within that section.

**Important:** Dragging and dropping is shown in this Guide as a dotted orange line, with an orange circle indicating the drag *origin*, and an orange diamond indicating the drag *destination*.

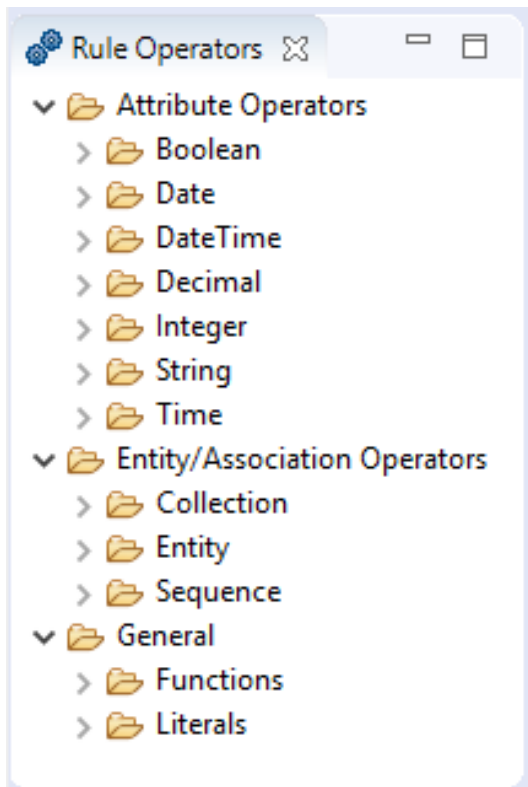
## Use the operator vocabulary to build rules

### Literal Terms, Functions & Operations

Corticon Studio's built-in library of operators is located (in the default Rule Modeling perspective) in the **Rule Operators** window in the lower left-hand corner of the Corticon Studio window.

If this window tab is not visible, select **Window > Show View > Rule Operators** from the Corticon Studio menubar.

Not all operators may be used in all types of rules or in all parts of the Rulesheet – refer to the *Rule Language Guide* for complete details.



1. Click the **General** or **Attribute Operators** folders, or click the plus sign beside a category, to expand them.
2. Select the operator you want, and then drag and drop it onto the Rulesheet.

## Create rules by importing an Excel worksheet

Often decisions are based on statistical data in tables that are actuarial or real-world data that cannot be derived through a formula. Insurance underwriting, manufacturing tooling, life sciences, and census data have examples of data that is key to decision making yet revised only at regular time intervals.

When used in Corticon, a Rulesheet that provides such data is very useful but could require hours of data entry to create what might be thousands of rules. This feature, sometimes referred to as *rule harvesting*, makes that task fast, easy, and accurate.

Consider the following excerpt of the sample Excel worksheet with data as an example for life insurance underwriting. (In a Studio installation, the file is located at 1

[CORTICON\_WORK\_DIR]\Samples\ImportExcel\SampleDimensionalData.xlsx.)

Column A contains headers that identify the applicant's age, and row 1 contains headers that identify the beneficiary's age. The cells are the policy factor that adjusts the policy premium:

|   | A          | B      | C      | D      |
|---|------------|--------|--------|--------|
| 1 | Dimensions | 50     | 51     | 52     |
| 2 | 40         | 0.9680 | 0.9698 | 0.9715 |
| 3 | 41         | 0.9652 | 0.9670 | 0.9689 |
| 4 | 42         | 0.9618 | 0.9640 | 0.9660 |

When this two-dimensional information is imported into a Corticon Rulesheet, each of the two dimensions and the data area are assigned to Vocabulary attributes within an entity. Then, each of the two dimensions defines a Condition and the data point specifies an Action, as shown:

| Conditions |                       | 0 | 1  | 2  | 3  |
|------------|-----------------------|---|----|----|----|
| a          | Policy.applicantAge   |   | 50 | 51 | 52 |
| b          | Policy.beneficiaryAge |   | 40 | 40 | 40 |

| Actions         |               | ←     |        |        |
|-----------------|---------------|-------|--------|--------|
| Post Message(s) |               |       |        |        |
| A               | Policy.factor | 0.968 | 0.9698 | 0.9715 |

When the data range expands, there could be thousands of rules in the Rulesheet that were all created by one import action, and later updated by performing the same import from the revised worksheet.

### Preparing Excel sheets

In order to achieve successful import of a dimensional Excel worksheet into Corticon, the sheet must have a specific layout. The sample sheet **Two Dimensions** is modified and offset here to present a few concepts:

|    | A                   | B          | C  | D      | E      | F      | G      | H      | I      | J      | K      | L      |
|----|---------------------|------------|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| 1  | <b>C3:L12</b>       |            | <i>Customer age is in the rows and beneficiary age is in the columns</i> |        |        |        |        |        |        |        |        |        |
| 2  |                     | Dimensions | 50   | 51     | 52     | 53     | 54     | 55     | 56     | 57     | 58     | 59     |
| 3  | <i>This is the</i>  | 40         | 0.9680   | 0.9698 | 0.9715 | 0.9732 | 0.9747 | 0.9762 | 0.9776 | 0.9789 | 0.9802 | 0.9813 |
| 4  | <i>customer age</i> | 41         | 0.9652   | 0.9670 | 0.9689 | 0.9707 | 0.9724 | 0.9741 | 0.9756 | 0.9771 | 0.9785 | 0.9798 |
| 5  | <i>x bene age</i>   | 42         | 0.9618   | 0.9640 | 0.9660 | 0.9680 | 0.9699 | 0.9717 | 0.9734 | 0.9750 | 0.9766 | 0.9780 |
| 6  | <i>factor table</i> | 43         | 0.9582   | 0.9605 | 0.9628 | 0.9650 | 0.9670 | 0.9690 | 0.9709 | 0.9727 | 0.9744 | 0.9760 |
| 7  |                     | 44         | 0.9541   | 0.9567 | 0.9592 | 0.9616 | 0.9639 | 0.9660 | 0.9681 | 0.9700 | 0.9719 | 0.9737 |
| 8  |                     | 45         | 0.9496   | 0.9524 | 0.9551 | 0.9577 | 0.9603 | 0.9627 | 0.9650 | 0.9671 | 0.9692 | 0.9711 |
| 9  | <i>2015</i>         | 46         | 0.9447   | 0.9477 | 0.9506 | 0.9535 | 0.9562 | 0.9589 | 0.9614 | 0.9638 | 0.9660 | 0.9682 |
| 10 |                     | 47         | 0.9392   | 0.9425 | 0.9456 | 0.9487 | 0.9517 | 0.9546 | 0.9574 | 0.9601 | 0.9626 | 0.9651 |
| 11 |                     | 48         | 0.9332   | 0.9367 | 0.9402 | 0.9436 | 0.9467 | 0.9499 | 0.9529 | 0.9559 | 0.9587 | 0.9613 |
| 12 |                     | 49         | 0.9266   | 0.9304 | 0.9341 | 0.9377 | 0.9413 | 0.9447 | 0.9480 | 0.9512 | 0.9542 | 0.9572 |
| 13 |                     |            |  |        |        |        |        |        |        |        |        |        |

- The data range, C3:L12, has no empty cells, and each cell has the same data type.
- Column B, to the left of the start point, is assumed to have the values for each row in the vertical dimension.
- Row 2, above the start point, is assumed to have the values for each column in the horizontal dimension.
- The dimension values have no empty cells, no duplicate values, and each cell has the same data type.
- The dimension and data cells, B2:L12, are the only cells read by the import feature. Data in any other cells have no impact on the import. Conversely, setting a range that includes blank cells, such as C3:M13, will not import successfully.

A one dimensional table follows similar rules. The only consideration is to specify only the appropriate dimension, as in the sample sheet **One Dimension** that uses the vertical attribute:

|    | A         | B      |
|----|-----------|--------|
| 1  | Dimension |        |
| 2  | 40        | 0.9934 |
| 3  | 41        | 0.9933 |
| 4  | 42        | 0.9932 |
| 5  | 43        | 0.9931 |
| 6  | 44        | 0.9929 |
| 7  | 45        | 0.9927 |
| 8  | 46        | 0.9925 |
| 9  | 47        | 0.9923 |
| 10 | 48        | 0.9920 |
| 11 | 49        | 0.9916 |

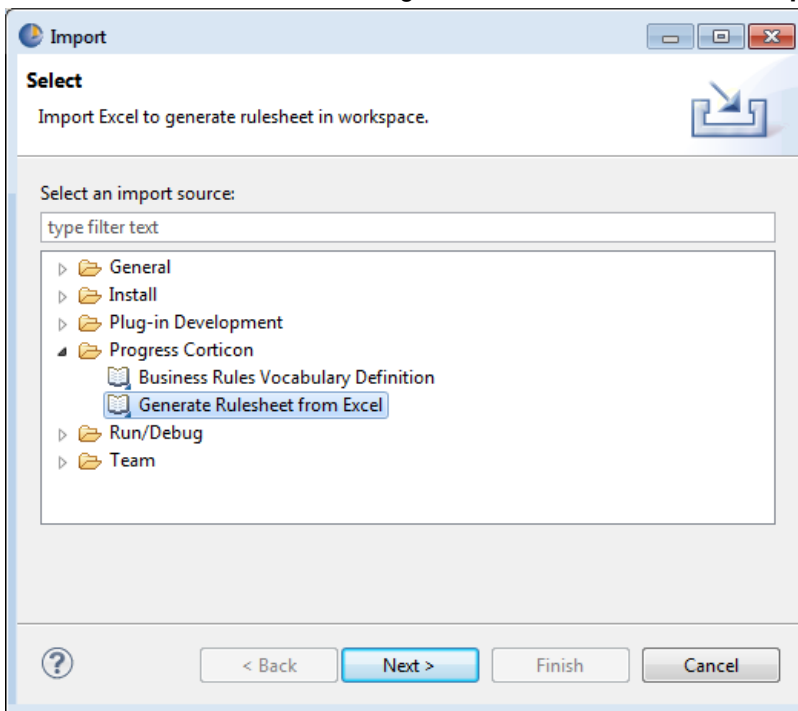
**Note: Decimal precision** - Some decimal values might seem imprecise between the Excel workbook value and their corresponding Rulesheet action value. A good practice is to set the Excel workbook precision before initiating an import into Corticon. With the Workbook open and the data formatted to the preferred decimal precision, click the **Microsoft Office** Button, click **Excel Options**, and then click **Advanced** category. In the **When calculating this workbook** section, select the workbook that you want, click to select the **Set precision as displayed** check box, and then click **OK**. You are alerted that you are losing precision while in fact you are ensuring that the value displayed is the value that is imported into Corticon. Save and close the Excel workbook, and then start the import process.

## Importing the Excel sheet into a Rulesheet format

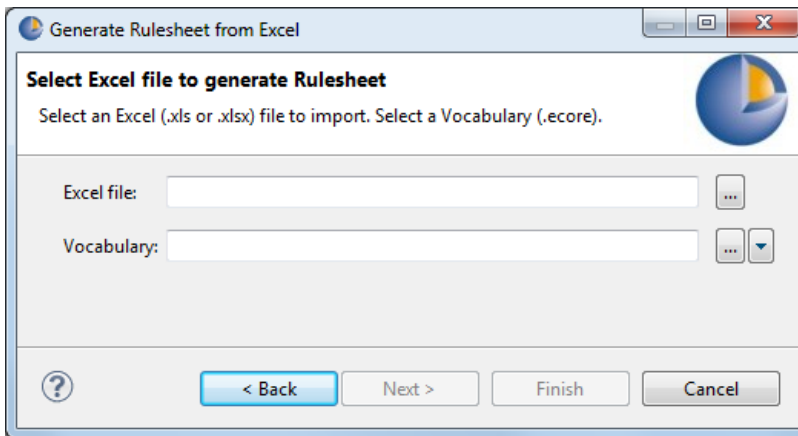
Once your Excel sheet has been prepared, you can import it into a Rulesheet.

### To import an Excel sheet into Corticon Studio:

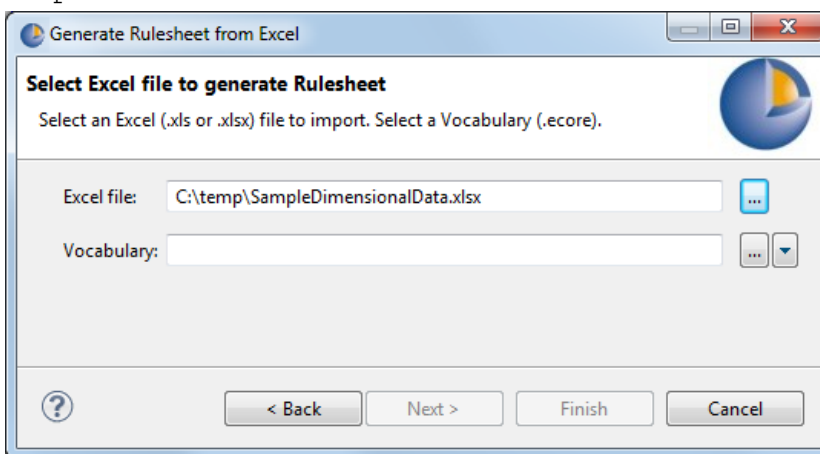
1. Select the menu command **File > Import**. You could instead navigate to the Vocabulary of the project where the Rulesheet will be created to right-click on it, and then select **Import**.



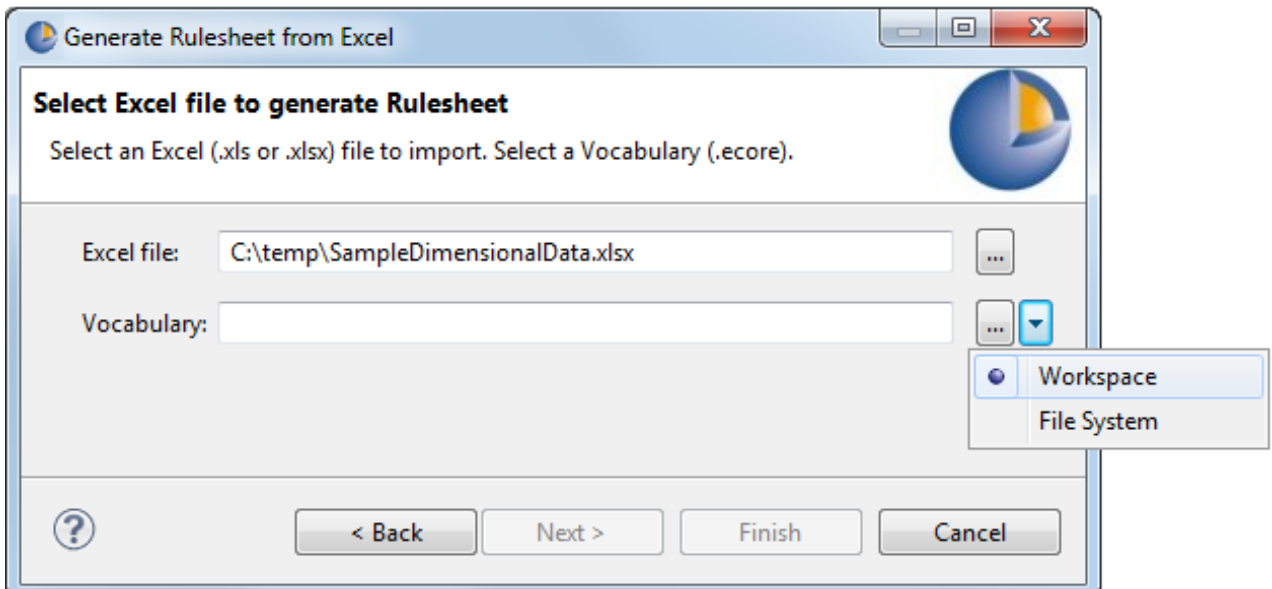
Click **Next**. The **Generate Rulesheet from Excel** dialog box opens:



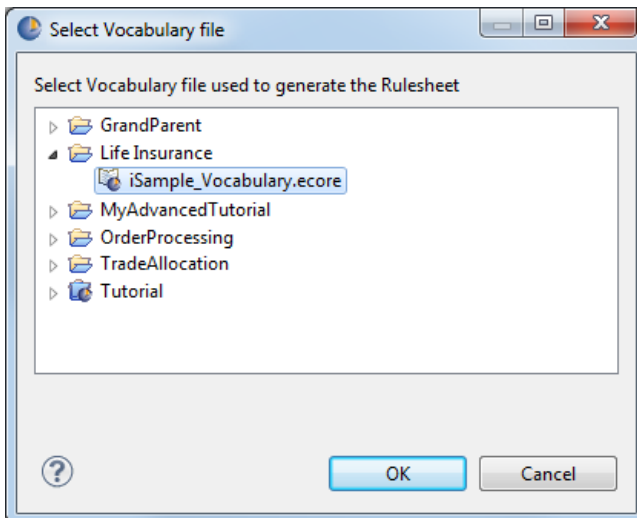
2. Click the **Excel file** search button, and then locate and open the Excel file. For this example, select SampleDimensionalData.xlsx.



3. Click the **Vocabulary** search button, and then locate and open the Vocabulary file. As illustrated, you can choose to find it in the workspace or in the file system. (If you launched the **Import** function with the Vocabulary file selected, the Vocabulary file is pre-selected when the dialog opens.)



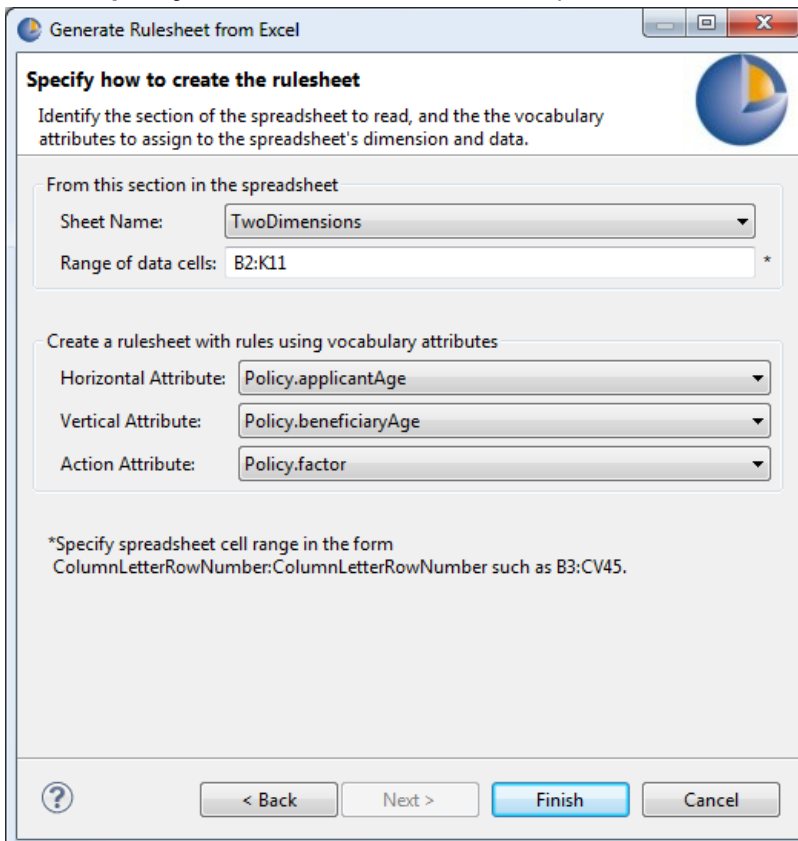
4. To follow the example, choose the Life Insurance sample's Vocabulary:



Click **OK** to close the selection dialog, and then click **Finish** to enter the import parameters.

**Note:** If you are following these steps hands on in Studio, you need to add three attributes to the Life Insurance sample's Vocabulary **Policy** entity, one named `applicantAge` with the datatype `human_age`, one named `beneficiaryAge` with the datatype `human_age`, and another named `factor` with the datatype `decimal`.

5. On the **Specify how to create the Rulesheet** panel, choose or enter the parameters as shown:



Click **Finish**. The import process creates a Rulesheet in the project with the name of the Excel sheet.

6. Review the results in the Studio:

| Conditions      |                       | 0   | 1     | 2      | 3      | 4      | 5      | 6      | 7      | 8      | 9      | 10     | 11     | 12     |
|-----------------|-----------------------|-----|-------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| a               | Policy.applicantAge   |     | 50    | 51     | 52     | 53     | 54     | 55     | 56     | 57     | 58     | 59     | 50     | 51     |
| b               | Policy.beneficiaryAge |     | 40    | 40     | 40     | 40     | 40     | 40     | 40     | 40     | 40     | 40     | 41     | 42     |
| Actions         |                       | ... |       |        |        |        |        |        |        |        |        |        |        |        |
| Post Message(s) |                       | ... |       |        |        |        |        |        |        |        |        |        |        |        |
| A               | Policy.factor         |     | 0.968 | 0.9698 | 0.9715 | 0.9732 | 0.9747 | 0.9762 | 0.9776 | 0.9789 | 0.9802 | 0.9813 | 0.9652 | 0.9665 |
| B               |                       |     |       |        |        |        |        |        |        |        |        |        |        |        |

The Rulesheet has 100 columns, one for each rule from the 10x10 matrix that was imported.

- To follow up with an import of the one dimensional sheet, repeat steps 1 through 4, and then choose or enter the parameters as shown:

**Generate Rulesheet from Excel**

Specify how to create the rulesheet

Identify the section of the spreadsheet to read, and the the vocabulary attributes to assign to the spreadsheet's dimension and data.

From this section in the spreadsheet

Sheet Name: OneDimension

Range of data cells: B2:B11

Create a rulesheet with rules using vocabulary attributes

Horizontal Attribute: [Blank]

Vertical Attribute: Policy.applicantAge

Action Attribute: Policy.factor

\*Specify spreadsheet cell range in the form ColumnLetterRowNumber:ColumnLetterRowNumber such as B3:CV45.

< Back    Next >    Finish    Cancel

Notice that the Horizontal attribute was left blank and the range specifies only one column.

- Review the results in the Studio:

| Conditions      |                     | 0   | 1      | 2      | 3      | 4      | 5      | 6      | 7      | 8      | 9     | 10     | 11 |
|-----------------|---------------------|-----|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|----|
| a               | Policy.applicantAge |     | 40     | 41     | 42     | 43     | 44     | 45     | 46     | 47     | 48    | 49     | -  |
| b               |                     |     |        |        |        |        |        |        |        |        |       |        |    |
| Actions         |                     | ... |        |        |        |        |        |        |        |        |       |        |    |
| Post Message(s) |                     | ... |        |        |        |        |        |        |        |        |       |        |    |
| A               | Policy.factor       |     | 0.9934 | 0.9933 | 0.9932 | 0.9931 | 0.9929 | 0.9927 | 0.9925 | 0.9923 | 0.992 | 0.9916 |    |
| B               |                     |     |        |        |        |        |        |        |        |        |       |        |    |

The Rulesheet has 10 columns, as shown, one for each rule from the 10x1 matrix that was imported.

### Updating an imported sheet

When you run these import tasks again, the existing Rulesheet of the same name in the project is replaced.

## How to name Rulesheets

Rulesheets can be named when created and renamed later by:

Clicking **File > Save As...**

Rulesheet names must adhere to and comply with the guidelines shown in the [File naming restrictions](#) on page 16 section of this document.

## How to validate and optimize a Rulesheet

Conflict, Completeness, and Logical Loop Checkers, as well as the Compress Rules feature, are collectively known as validation and optimization functions. These topics are addressed briefly in the *Corticon Studio Tutorial: Basic Rule Modeling*, and in more depth in the *Corticon Studio: Rule Modeling Guide*.

On very rare occasions, expanding, compressing or completing very large Rulesheets may cause Corticon Studio to run out of memory. If this occurs, try increasing Corticon Studio's memory allotment by modifying the shortcut you used to launch Corticon Studio. Details on this procedure are included in the *Corticon Installation Guide*, "Changing Corticon Studio Memory Allocation" section.

## How to create a Rulesheet report

1. With the Rulesheet you want to report open as the current window, choose the menu command **Rulesheet > Report**.

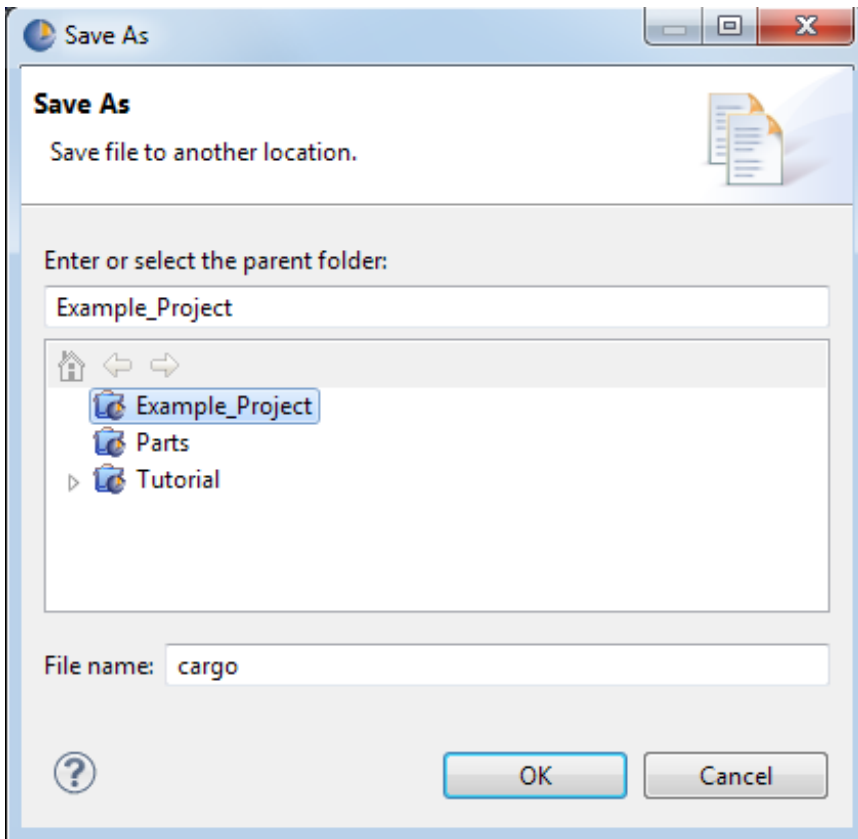
The **Generate Report** dialog opens.

2. Choose the **Report Type**, **Report Style**, and **Output Folder** for this report. Report types focus on either Natural Language or Expressions in the Rulesheet.
3. Click **Finish**.
4. The Rulesheet report opens as a new HTML page in your default web browser, and then saves the HTML, XML, and CSS files in the specified output folder.

The default CSS and XSLT files are samples that you can customize to suit your preferences.

## How to save a new Rulesheet

1. With the Rulesheet selected, choose the Save command or click the save button.
2. Navigate to the **Project** folder where you want to store the Rulesheet.
3. The same file naming conventions apply to Rulesheets as apply to Vocabularies. See [File naming restrictions](#) on page 16.

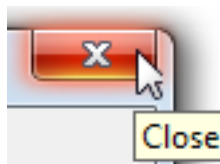


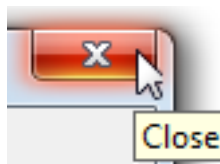
## How to save a modified Rulesheet

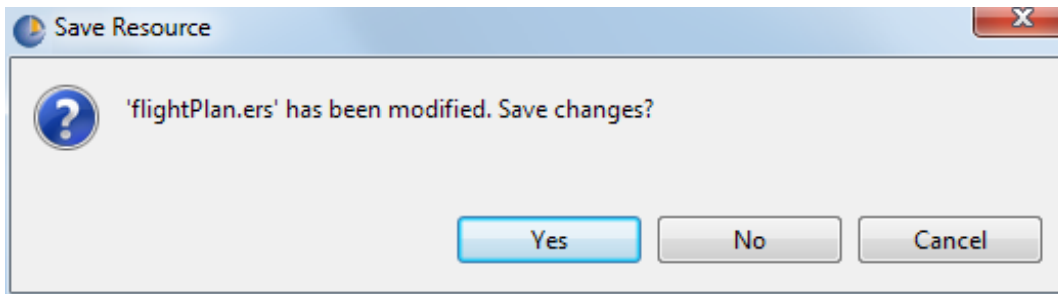
When you save a modified Rulesheet, the Corticon Studio automatically saves it to the current Rulesheet name. To save the Rulesheet to another name:

Choose **File > Save As** from the menubar.

## How to close a Rulesheet




1. To close a Rulesheet, click its Close button, , or select the menu command **File > Close**.



2. Choose **Yes** to save any changes, and close the file.

## How to delete Rulesheets

Deleting Rulesheets is performed using one of the following methods:

- Right-click the Rulesheet in the **Project Explorer** window and select **Delete**  from the pop-up menu
- Select the Rulesheet in the **Project Explorer** window, and then press the **Delete** key.

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# Ruleflows

---

A Ruleflow is how Corticon assembles and organizes the components of a set of rules into a single unit. It is presented as a flow diagram, where Rulesheets, Service Callouts, and even other Ruleflows depict the flow of the rule, allowing it to iterate and to branch.

Once a Ruleflow is defined, it can be tested in Studio, and it can be compiled into a Decision Service for deployment in production environments (as described in the *Deployment Guide*).

---

**Important:** Corticon's Ruletester lets you test individual Rulesheets as well as Ruleflows in the Studio. In order to deploy a Rulesheet to it must be part of a Ruleflow. Only Ruleflows can be compiled into Decision Services, and only Decision Services are deployable to Corticon Server .

---

The Rulesheets components and the Ruleflow must be all using the same Vocabulary file. Ruleflow files have the extension `.erf`.

For details, see the following topics:

- [Use AI Assistant in a Ruleflow](#)
- [How to create a Ruleflow](#)
- [Ruleflow window](#)
- [Ruleflow properties](#)
- [Ruleflow preferences](#)

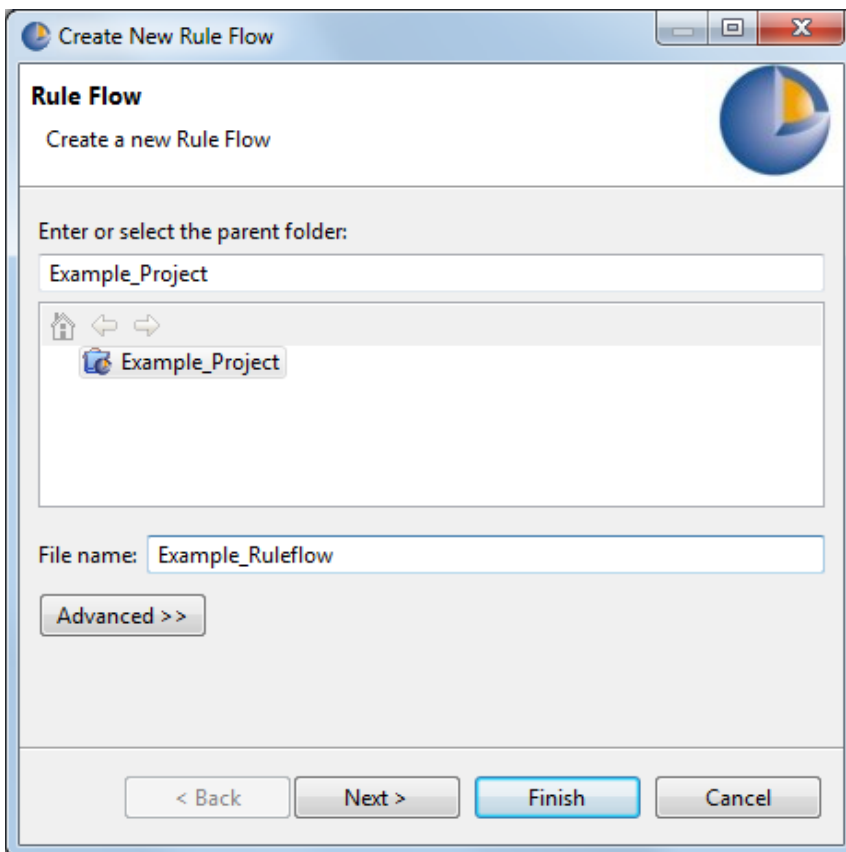
## Use AI Assistant in a Ruleflow

The Corticon AI Assistant can help you explore, understand, and create rule assets directly in Corticon Studio. You can ask questions, generate documentation, create or test rules, and more—all from within the Assistant panel. See *Using the Corticon AI Assistant in this guide* for details.

## How to create a Ruleflow

To create a Ruleflow:

1. Choose **File > New > Ruleflow** from the menubar or click the down arrow next to the **New** icon on the toolbar and select **Ruleflow**. Either method will launch the **Create a New Ruleflow** wizard.



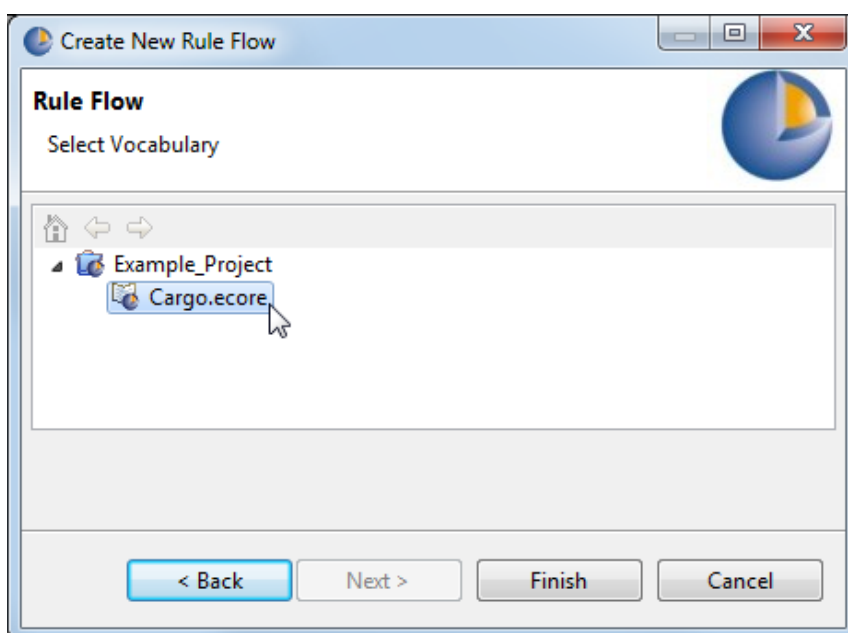
2. On the **Project** list, select the Project you want to associate with the new Ruleflow (or enter it manually in the **Enter or select parent folder** entry area).
3. Enter a file name for the Ruleflow in the **File name** entry area.

---

**Note:** The **Advanced** options are not relevant to Corticon and should not be used.

---

4. Click **Next** to continue.




---

**Note:** The dialog only lists the Vocabularies for the parent project. This prevents you from creating cross-project assets. Do not create cross-project assets.

---

5. Select the Vocabulary with which you want to associate the Ruleflow. A Ruleflow can only be associated with one Vocabulary. We expanded the `Example_Project` folder to highlight the `Cargo.ecore` file, and then click **Finish**.
6. Your new Ruleflow is added in the **Project Explorer** window with the `.erf` extension, and in a new active window with a tab of the given name. The Ruleflow menubar and toolbar are displayed instead of the Vocabulary menubar and toolbar.

You are now ready to begin assembling the components of your Ruleflow.

## Ruleflow window

Opening a Ruleflow or making a Ruleflow the active Corticon Studio window causes the Corticon Studio menubar and toolbar to display the tools needed to begin working with Ruleflows.

## How to name Ruleflows

Ruleflow names must adhere to and comply with the guidelines shown in the [File naming restrictions](#) on page 16 section of this document.

## How to add Ruleflows

To add additional Ruleflows to a Rule Project

Select **File > New > Ruleflow** from the menubar and repeat the steps recounted earlier in the [Ruleflow creation](#) process.

Alternatively, you can select **New > Ruleflow** from the toolbar.

## How to delete Ruleflows

- A Ruleflow can be deleted by:
  - highlighting it in the **Project Explorer** file list and selecting **Edit > Delete** from the menubar
  - right-clicking the file in the **Project Explorer** window and selecting **Delete** from the pop-up menu.

## How to save a new Ruleflow

- Select **File > Save** from the menubar or click the **Save** button  on the toolbar to save a new or modified Ruleflow.

Refer to the [Ruleflow menu commands](#) on page 106 topic for details regarding saving, or renaming, a Ruleflow with a different name or to a different file location.

## Ruleflow menu commands

The following menu is available when the Ruleflow editor is the active window.

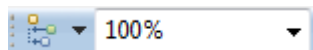
The **Ruleflow** menu has the following commands:

- **Comment** —Opens the Add Comment window. When no object is selected, the comment is a file type for the entire Ruleflow. When one object on the canvas has been selected, the comment applies as one entry to that object and its type. To review comments on this asset and its components, see *"Use the Comments view" in this Guide*.
- **Properties** —Opens the Ruleflow properties window.
- **Dependency graph**—Generates attribute and logical dependency graphs based on selected nodes in the active Ruleflow. For more information, see *"How to generate Ruleflow dependency graphs" in the Rule Modeling Guide*.
- **Report** —Creates an HTML report and launches your browser for viewing. See *"How to create a Ruleflow Report" in this Guide*.
- **Generate Ruletest** —Produces unit testsheets for improved tests and debugging. See *"Generate Ruletests" in the Corticon Rule Modeling Guide*.
- **Service Contract** —Creates a CSV file that provides guidelines for creating a service contract for the Ruleflow. See *"Service contract output" in the Deployment Guide*.
- **Export JSON**—Opens the **Export Decision Service JSON** dialog box for this Ruleflow, which generates a JSON representation of the current ruleflow for use in external tools like custom reports, audits, or integrations. The schema is located in the adjacent Doc folder. See *"Export a decision service as a JSON file" in the Deployment Guide*
- **Export WSDL**—Opens the **Export Ruleflow WSDL** dialog box for this Ruleflow. WSDL service contracts are discussed in the set of topics in the Deployment section, *"How to integrate Corticon Decision Services" in the Deployment Guide*.

- **Export XSD**—Opens the **Export Ruleflow XSD** dialog box for this Ruleflow. XSD service contracts are discussed in the set of topics in the Deployment section, *"How to integrate Corticon Decision Services" in the Deployment Guide*.

## Ruleflow toolbar

When the Ruleflow editor is active, a few of its tools are added to the toolbar, as shown:



These functions can also be accessed on the context menu that opens when you right-click on the Ruleflow canvas.

|  |  |
|--|--|
|  | <p>Aligns multiple selected objects on the Ruleflow canvas.</p>  |
|  | <p>Zooms the Ruleflow window to the specified magnification.</p> |

## Editor commands on the Ruleflow context-sensitive menu

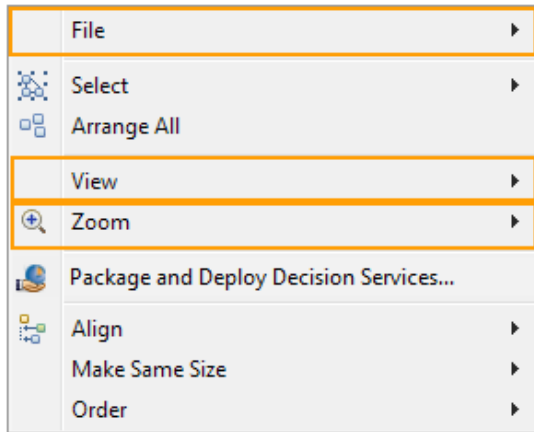
The Ruleflow pop-up menu opens when you right-click on a Ruleflow's canvas. This menu provides quick access to many frequently used functions specific to managing the file and the canvas.

---

**Note:** You might see a menu item **Remove from Context**. It is a standard operator yet not used in the Ruleflow editor.

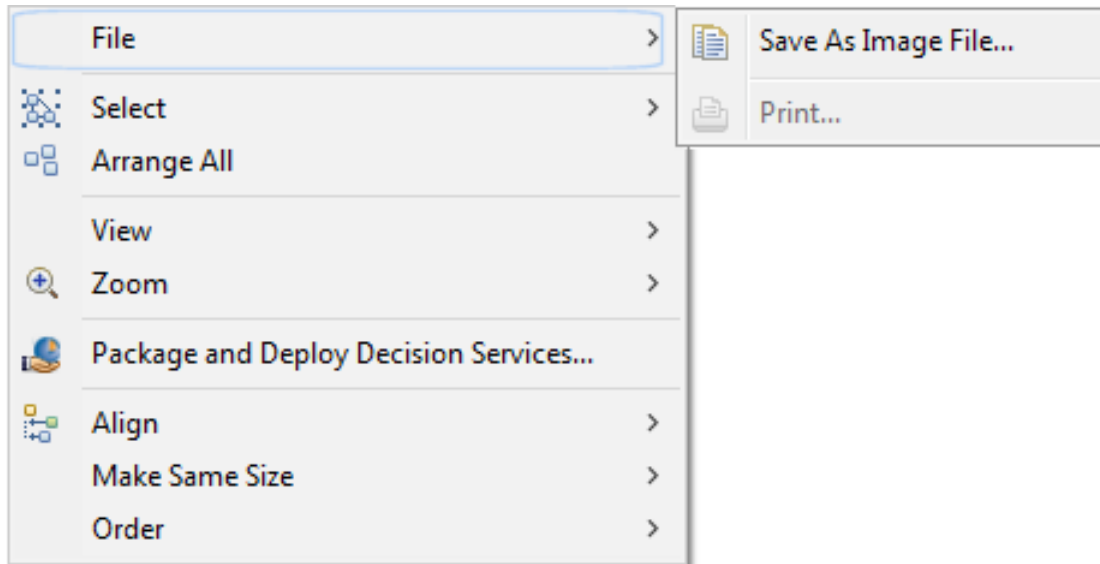
---

See [Object commands on the Ruleflow context-sensitive menu](#) on page 121 for commands that affect objects on the canvas.



The three sections highlighted above are the file and canvas related menu commands on the Ruleflow pop-up menu.

### File



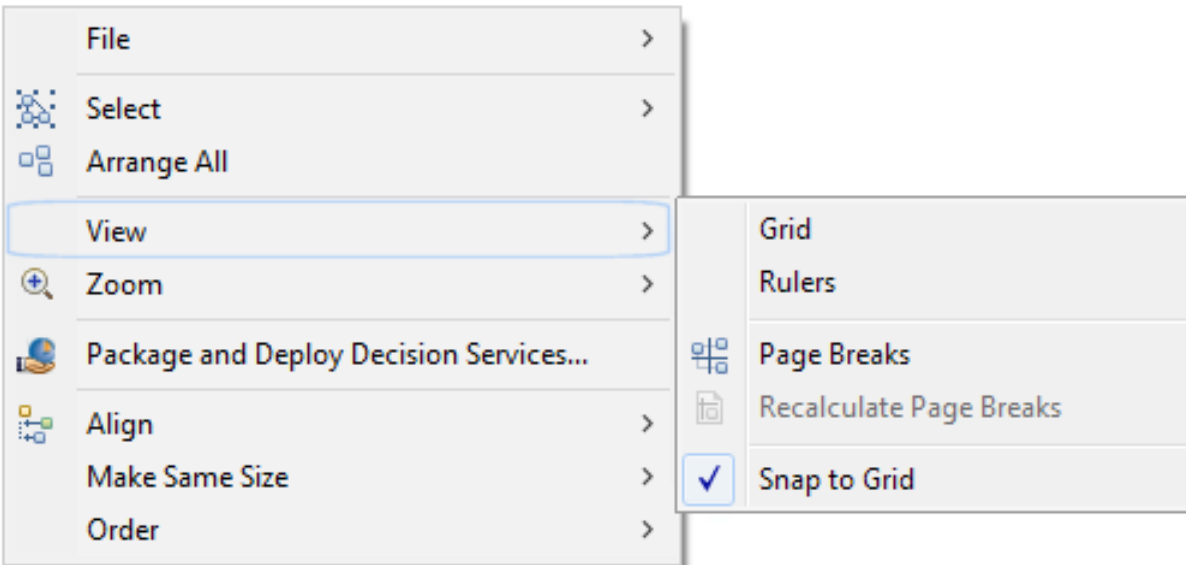
### Select

See [Object commands on the Ruleflow context-sensitive menu](#) on page 121.

### Arrange All

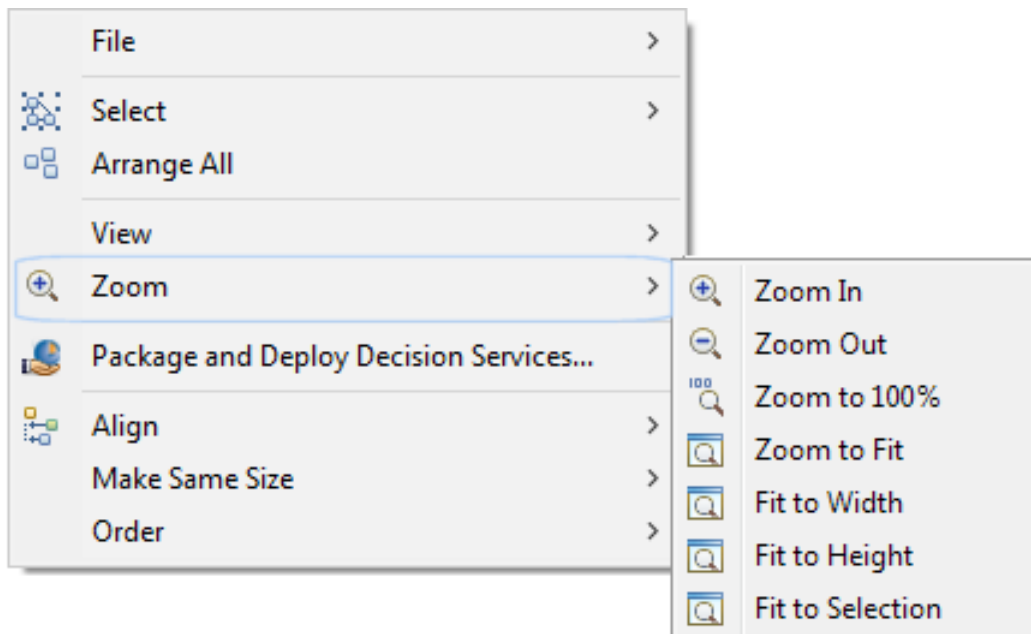
See [Object commands on the Ruleflow context-sensitive menu](#) on page 121.

## View



- **Grid** displays a light gray grid overlay in the Ruleflow window
- **Ruler** displays rulers on the X and Y axes of the Ruleflow window
- **Page Breaks** displays breaks in the Ruleflow window when the window is larger than the size of the page
- **Recalculate Page Breaks** updates breaks when changes are made to the Ruleflow window
- **Snap to Grid** assists in aligning Ruleflow shapes to the overlay grid (whether visible or not)

## Zoom



## Package and Deploy Decision Services

Lets you move the Ruleflow immediately to compilation and deployment as a Decision Service. Forces you to save all changes, then opens the **Package and Deploy Decision Services** dialog. In the Package and Deploy wizard, you can export Ruleflows in the Corticon Rules JSON Schema format. When selected, the next wizard page lets you export one or more Ruleflows in the project to a directory of your choice. The resulting JSON file names will be derived from the Decision Service name and version number, following the same logic currently used to generate .eds file names during the deployment process.

See *"Use Studio to package and deploy Decision Services"* in the *Deployment Guide*.

## Align

See [Object commands on the Ruleflow context-sensitive menu](#) on page 121.

## Make Same Size

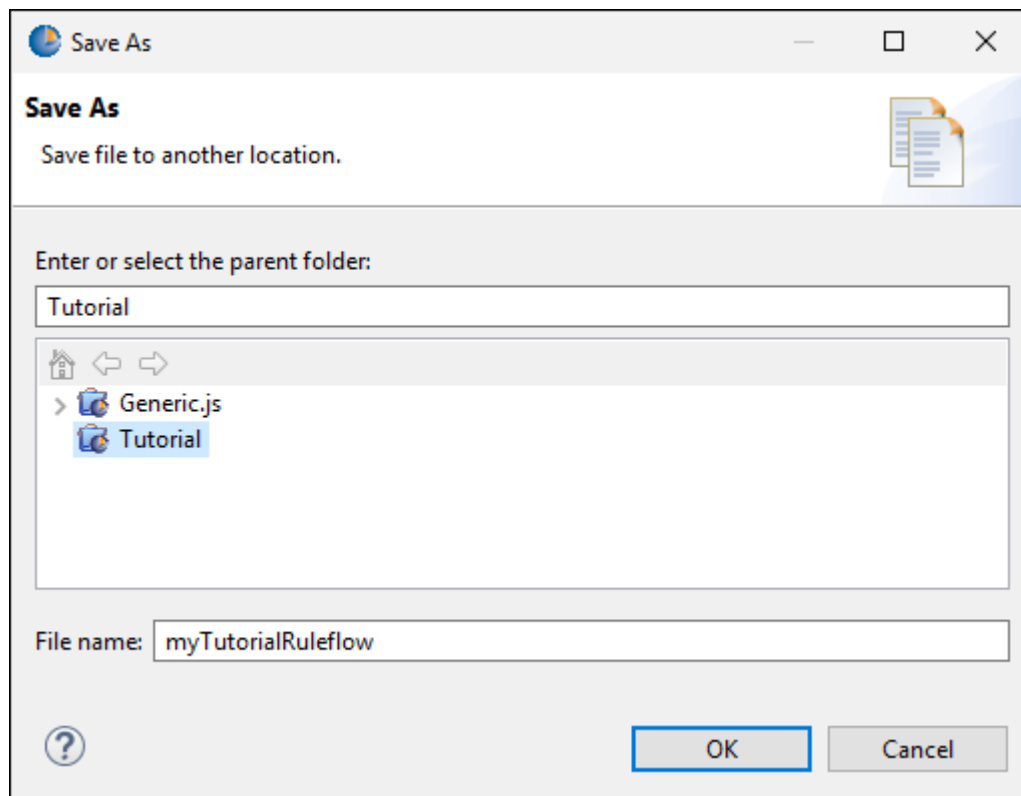
See [Object commands on the Ruleflow context-sensitive menu](#) on page 121.

## Order

See [Object commands on the Ruleflow context-sensitive menu](#) on page 121.

## How to rename a Ruleflow or save a Ruleflow to a different location

Selecting **File > Save As...** from the menubar displays the **Save As** dialog, allowing you to assign the Ruleflow a different name or save it to another location.



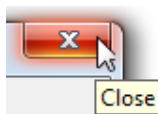
1. To rename the Ruleflow, modify the name in the **File name:** field with the **Project** folder highlighted in the **Project** list.
2. To save the Ruleflow to a different location, whether you are renaming it or not, select that **Project** folder in the **Project** list or enter the parent folder name manually in the **Enter or select the parent folder:** text field.
3. The same file naming conventions apply to Ruleflows as apply to Rulesheets. See the [File naming restrictions](#) on page 16 section of this document.

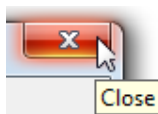
## How to create a Ruleflow report

1. With the Ruleflow you want to report open as the current window, choose the menu command **Ruleflow > Report**.
2. Choose the **Report Type**, **Report Style**, and **Output Folder** for this report. Report types focus on either Natural Language or Expressions in the Ruleflow's Rulesheets.
3. Click **Finish**.
4. The basic and detailed reports are saved as the `<project name>+<asset name>_<report type>` in the output folder as both HTML and XML, and then the HTML is opened in your default web browser. A complexity report is saved as a `.csv` file in the specified output folder.

The default CSS and XSLT files are samples that you can customize to suit your preferences.

## How to close a Ruleflow



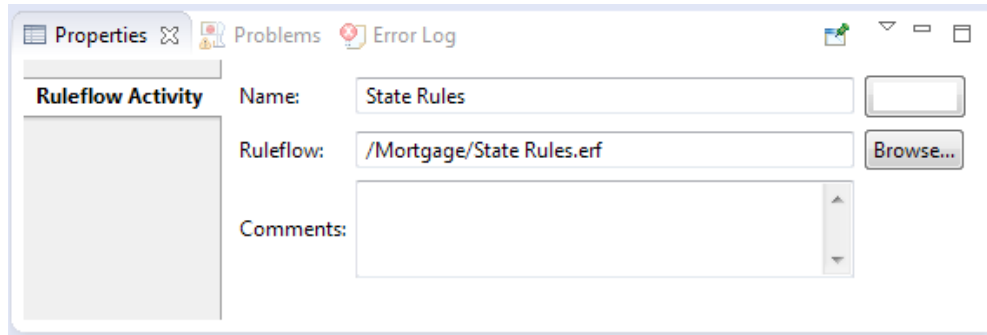
1. To close a Ruleflow, click its **Close** button,  , or select the menu command **File > Close**.
2. Choose **Yes** to save any changes you made.

## Ruleflow properties

When a Ruleflow is the active file, its properties display in the **Properties** tab at the bottom of the Corticon Studio window. This window provides “sub-tabs” arranged vertically at the left-hand side of the window.

**Note:**

**Ruleflow within a Ruleflow** - When a Ruleflow is added as a component of another Ruleflow, its **Properties** reflect that use case, providing only one tab, **Ruleflow Activity**, as illustrated:



In this context, the original file is referenced and you are allowed to browse to choose a different Ruleflow that uses the same Vocabulary. You can change the name of the Ruleflow in this context so that it provides meaning. None of these actions change the Ruleflow properties of the original Ruleflow.

## Ruleflow Activity

The Ruleflow tab contains information about the Vocabulary that is used by all Rulesheets, and other Ruleflows on the current Ruleflow canvas.

### Rule Vocabulary

Use this field to change the Vocabulary referenced by this Ruleflow. Notice that the location of the Rule Vocabulary associated with the Ruleflow is automatically entered for you in the **Rule Vocabulary** field. You can change this value by selecting **Browse** and choosing a different Vocabulary, if necessary.

### Major and Minor Version Numbers

Version numbers for Ruleflows are optional and are assigned manually.

When different version numbers are assigned to a Ruleflow, the Server keeps them distinguished in memory, and responds correctly to requests for the different (Major) versions. In other words, an application or process can use (or call) different (Major) versions of the same Ruleflow simply by including the (Major) version number in the request message. The details of how this works at the Server level are described in the *Server Guide*.

### Version Label

A plain-text description of this version can be added in the Ruleflow Version Label field.

Optional. Give the version a unique text label.

### Effective Date and Expiration Date

Effective and Expiration dates are optional for Ruleflows and can be assigned singly or in pairs. When we use different Effective and Expiration dates to describe identically named Ruleflows, the Server keeps them straight in memory, and responds correctly to requests for the different dates. In other words, an application or process can use different versions of the same Ruleflow depending on date criteria. The details of how this works at the Server level are technical in nature and are described in the *Deployment Guide*.

Effective and Expiration Dates may be assigned using the same window as above. Clicking on the **Effective Date** or **Expiration Date** drop-down displays a calendar:

**Figure 4: Setting the Effective Date on a Ruleflow**

The screenshot shows the 'Ruleflow' properties window. The 'Effective Date' field is active, displaying a calendar for June 2014. The date '6' (June 6th) is selected. The 'Expiration Date' field is also visible but not active. The 'Total Number of Rules' field is empty. The 'Time' fields for both Effective and Expiration dates are set to 0:00 AM.

| S  | M  | T  | W  | T  | F  | S  |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 |    |    |    |    |    |

Once dates are set, you can specify the effective time on that specified date.

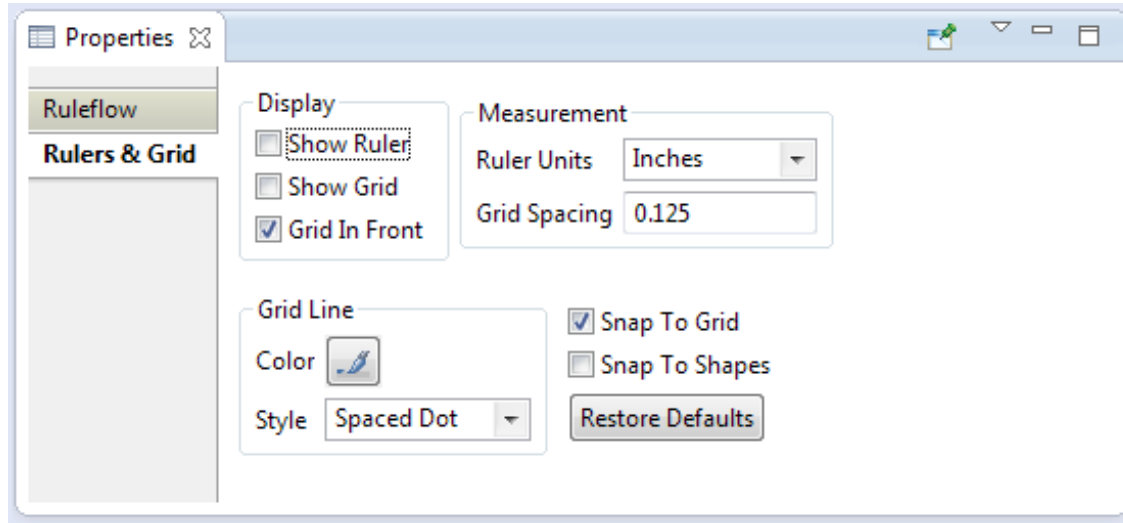
#### Total Number of Rules

Counts the total number of rules in all the Rulesheets included in this Ruleflow. For Column numbers 1 and higher, each *enabled* column is counted as one rule. For Column 0, each *enabled* Action row is counted as one rule.

## Rulers and grid

Selecting the **Rulers & Grid** sub-tab lets you display or hide the **Ruler** and **Grid** as well as format the color and style of the **Grid Line**. You can also adjust the unit of measure for the Ruler, the spacing within the Grid and **Snap** objects within the Ruleflow diagram to the Grid (or to align with other shapes). Clicking **Restore Defaults** reset the properties to the default settings, as shown:

**Figure 5: The Ruleflow Rulers and Grid Sub-tab**



## Settings for Ruleflow graph fonts

The following settings that you specify in the `brms.properties` file impact all the graphs produced from Ruleflows on the local machine:

```

These properties set the font type and size used by the graph visualizer
com.corticon.crml.CrmlGraphVisualizer.fontname=Helvetica-Narrow.ttc
com.corticon.crml.CrmlGraphVisualizer.fontname.ja=msgothic.ttc
com.corticon.crml.CrmlGraphVisualizer.fontsize=9

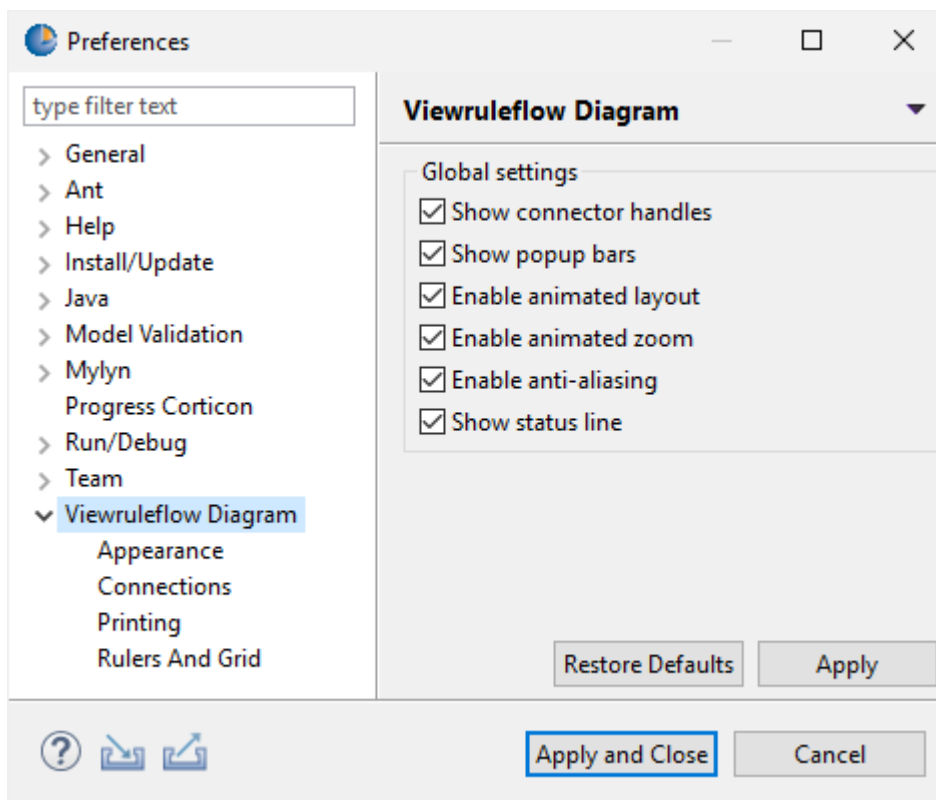
```

## Ruleflow preferences

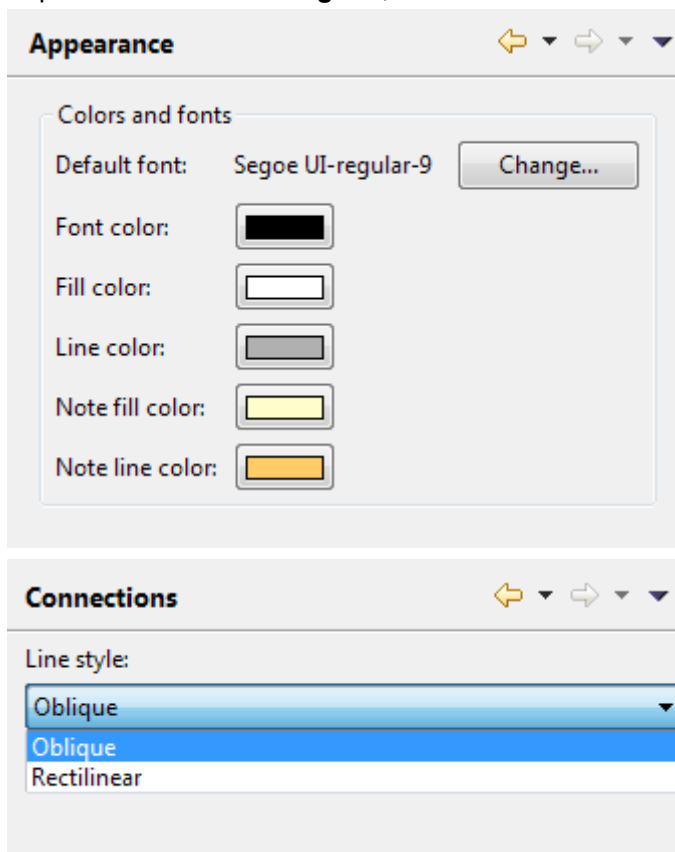
You can set many aspects of a the Ruleflow canvas and its output.

To set Ruleflow Preferences:

1. In Studio, choose the menu item **Window > Preferences**.
2. Click on **Viewruleflow Diagram**. The global settings are available as shown:



- Expand **Viewruleflow Diagram**, and then click on each of its items to expose the corresponding settings:

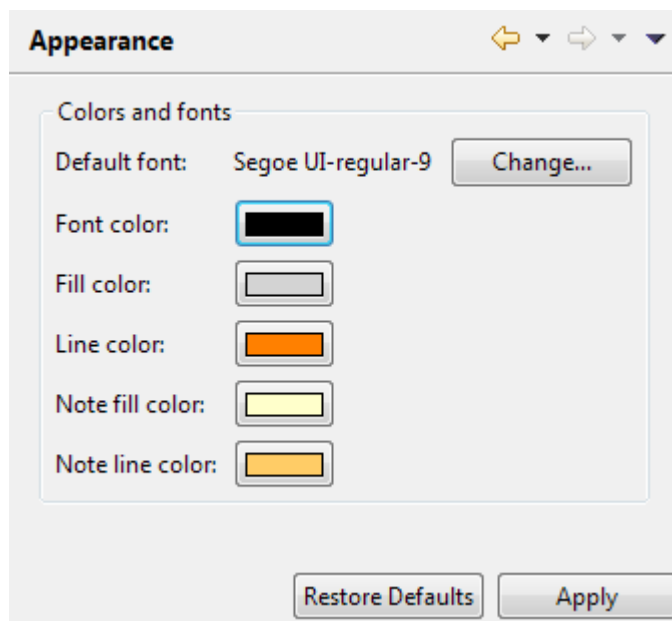


The image shows two dialog boxes from a software application. The top dialog is titled "Printing" and contains "General printing settings". It has a "Page setup" tab selected. Under "Orientation", the "Portrait" radio button is selected. Under "Units", the "Inches" radio button is selected. Under "Size", the "Letter" size is selected in a dropdown menu, with "Width (in inches): 8.5" and "Height (in inches): 11" shown in input fields. Under "Margins", all four fields (Top, Bottom, Left, Right) are set to "0.5". The bottom dialog is titled "Rulers And Grid" and has a "Ruler options" section with "Show rulers for new diagram" unchecked and "Ruler units: Inches" selected in a dropdown. The "Grid options" section has "Show grid for new diagrams" unchecked, "Snap to grid for new diagrams" checked, and "Snap to shapes for new diagrams" unchecked. The "Grid spacing (in inches)" is set to "0.125".

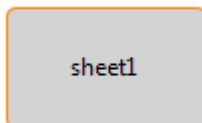
4. Adjust the settings to suit your needs, click **Apply**, and then click **OK**.

The next Ruleflow you create (as well as the next objects you define in an existing Ruleflow) will use your settings.

For example, if you modified and applied the **Appearance** preferences of Full and Line Color as follows...



...the next Rulesheet you bring onto a Ruleflow canvas would have the following look:



---

**Note:** The color preferences you set here could have the fill color overridden by the color property on the Properties of each object on the palette, as presented in [How to add colors to Ruleflow objects](#) on page 126. When an individual object's color reverts to its default value, white, the underlying preference color is used.

---

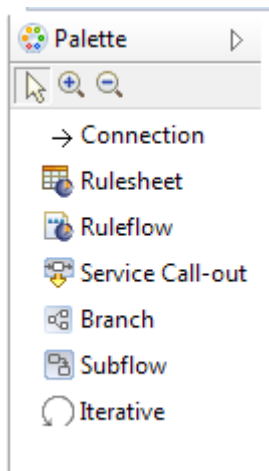


---

## Objects on a Ruleflow canvas

---

Ruleflow diagrams are displayed on the Ruleflow canvas. The objects that can populate a Ruleflow canvas are displayed in its palette:



These objects are used as follows:

### Connections

Connections are the objects that connect or “stitch” assets and objects together to control their sequence of execution. If a connector is drawn *from* Rulesheet `sample1.ers` *to* `sample2.ers`, then when a deployed Ruleflow is invoked, it will execute the rules in `sample1.ers` first, followed by the rules in `sample2.ers`.

Connections are used on a canvas but are not Corticon assets. They have no properties yet can change color when you choose **Preferences > Viewruleflow Diagram > Appearance > Line color** (which also will change the object outlines as well.)

### Rulesheets

Rulesheets are the essential Corticon assets in a Ruleflow. By arranging and organizing Rulesheets in the Ruleflow, you can specify execution sequence of the Rulesheets and offer control of the iteration of the Rulesheets.

Ruleflows serve as a kind of deployable “container” for Rulesheets. Rulesheets remain the basic unit of decision making, but they become much more reusable when combined in different ways in different Ruleflows.

For example, Rulesheet `sample.ers` can be included in many Ruleflows that use the same Vocabulary, each of which may have its own use in different business processes or applications.

### Ruleflows

Just as set of rules can be defined on several Rulesheets, and then assembled into a Ruleflow, Ruleflows can also be used as modules that are assembled into a 'master' Ruleflow. This capability makes it easier to test components of a large complex solution, as well as to make the 'master' Ruleflow canvas easier to read and understand.

### Service Call-Outs

Service Call-outs are a type of extension to a Ruleflow, and require significant Java development expertise. While they are not named *assets* in a project, they are named *operations* that are loaded into your Studio and Server projects. The method for building Service Call-outs is documented in detail in the *Extensions User Guide*.

Service Call-outs are also the mechanism for the packaged functionality that enables Advanced Data Connectors to access services and related stored queries. See the *Data Integration Guide* for more information.

### Branch

Branching lets you chose an attribute that is true/false (Boolean) or defined in a list (enumeration) so that data being processed is channeled to the branch object (Rulesheet, another Ruleflow, a Subflow, or a Service Call-out) that will act on it, as well as the subsequent objects that areconnected to it the branch. Branches are powerful processing structures of Corticon assets, yet are not in themselves Corticon assets.

### Subflows

Subflows provide a way to group multiple Corticon assets as a subset of a complete Ruleflow, and can be set to iterate so that all the objects in the subflow are re-executed until the values derived by their constituent rules cease changing. Subflows are a grouping mechanism of Corticon assets used on a canvas, but are not Corticon assets.

---

**Note:** While you can have multiple subflows in one Ruleflow, re-using a subflow name that has different Rulesheets and connections will evaluate the last one compiled ("farthest downstream") and use that for all instances.

---

### Iterative

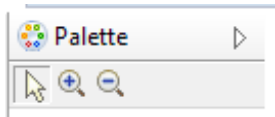
Rulesheets, Ruleflows, and Subflows can be designated for iteration by clicking the **Iterative** button in the palette, and then clicking on the target object on the canvas. To remove an iterative assignment, click on an iterative symbol in a object selected for iteration, and then press **Delete**. Iteration settings are used on a canvas but are not Corticon assets.

For details, see the following topics:

- [Ruleflow canvas tools](#)
- [Object commands on the Ruleflow context-sensitive menu](#)
- [Properties of Ruleflow objects on a Ruleflow canvas](#)
- [Iteration](#)
- [How to add colors to Ruleflow objects](#)

## Ruleflow canvas tools

The Ruleflow objects palette provides tools as well as object types:

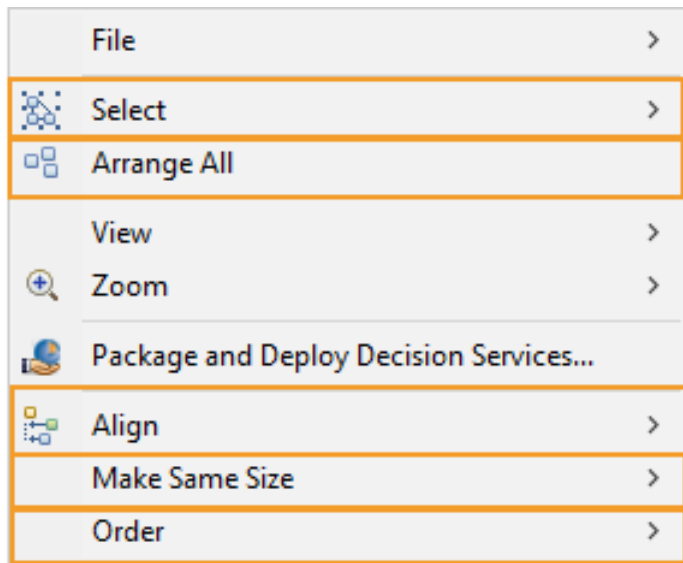


- **Select** – The default tool, the arrow cursor lets you select objects and manipulate one or more objects on the canvas.
- **Zoom** – The (+) button zooms in on the canvas; the (-) button zooms out from the canvas.

## Object commands on the Ruleflow context-sensitive menu

The Ruleflow pop-up menu opens when you right-click on a Ruleflow's canvas. This menu provides quick access to many frequently used functions for managing objects on a Ruleflow canvas.

See [Editor commands on the Ruleflow context-sensitive menu](#) on page 107 for the Ruleflow file-level commands.

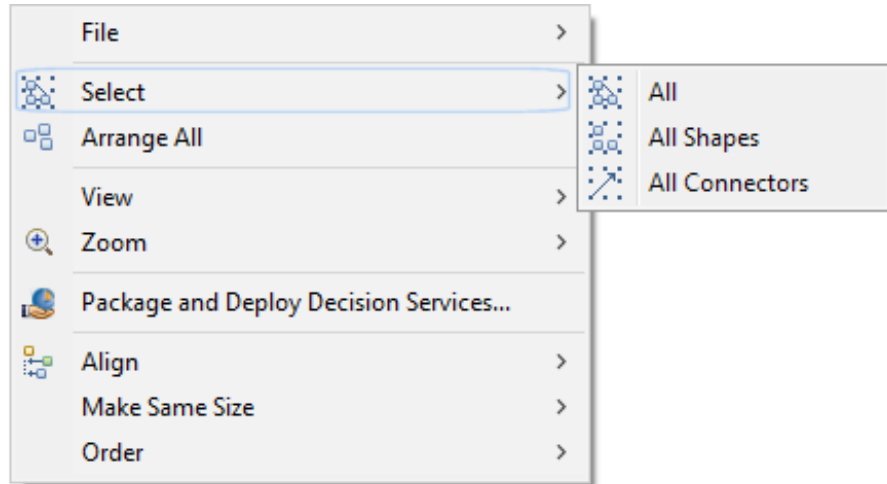
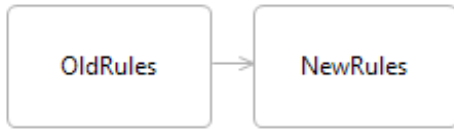


The five sections highlighted above are the object-related menu commands on the Ruleflow pop-up menu.

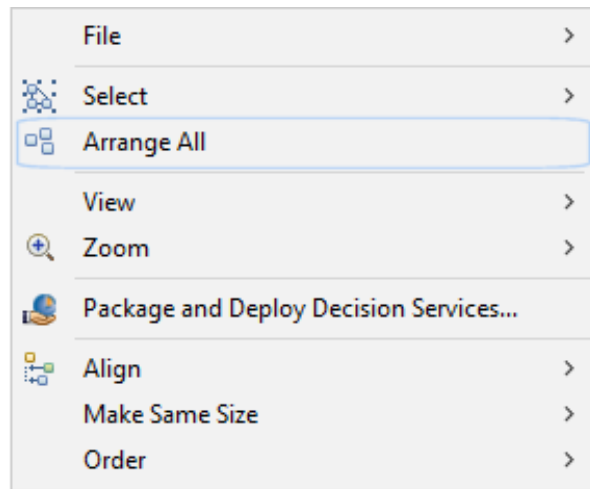
### File

See [Editor commands on the Ruleflow context-sensitive menu](#) on page 107.

### Select



### Arrange All



### View

See [Editor commands on the Ruleflow context-sensitive menu](#) on page 107.

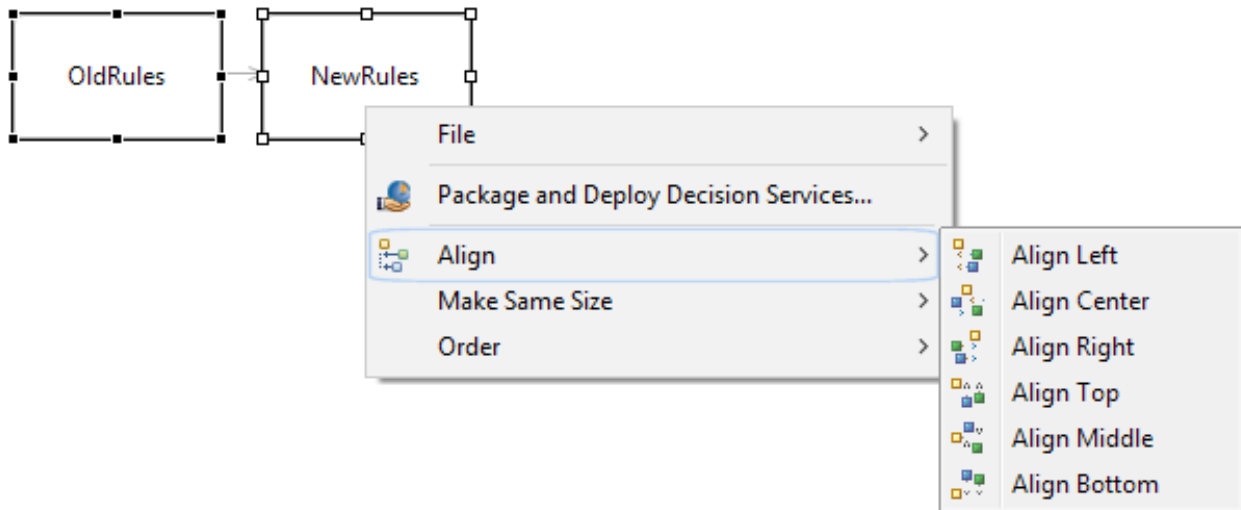
### Zoom

See [Editor commands on the Ruleflow context-sensitive menu](#) on page 107.

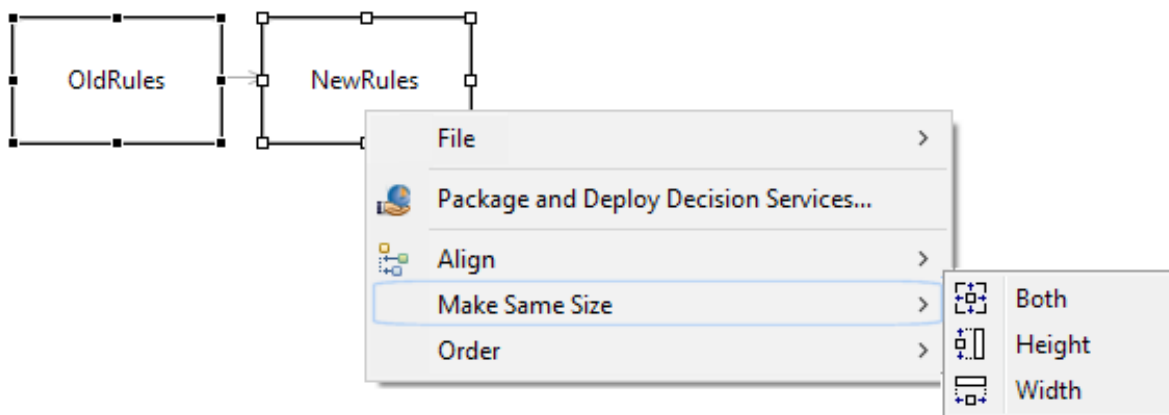
### Package and Deploy Decision Services

Lets you move the Ruleflow immediately to compilation and deployment. Forces you to save all changes, then opens the **Package and Deploy Decision Services** dialog. See *"Using Studio to package and deploy Decision Services"* in the *Deployment Guide*.

## Align

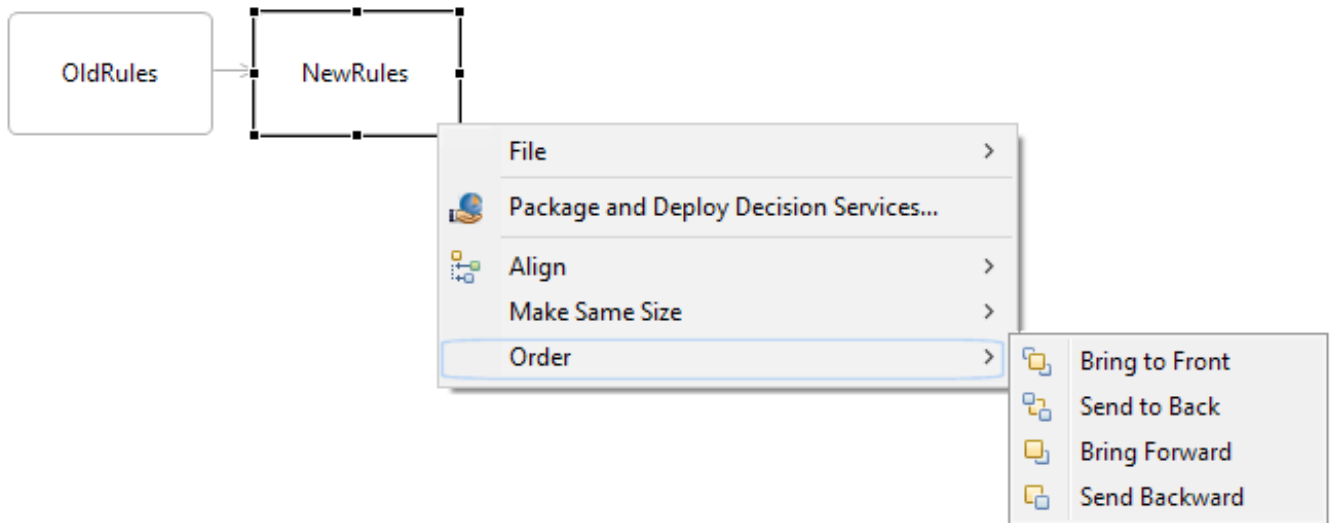


## Make Same Size



- **Both** resizes selected Rulesheet block icons to be the same size
- **Height** resizes selected Rulesheet block icons to be the same height
- **Width** resizes selected Rulesheet block icons to be the same width

## Order


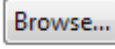


# Properties of Ruleflow objects on a Ruleflow canvas

While the Ruleflow that manages the entire file and the current canvas has specific properties (see [Ruleflow properties](#) on page 111), the objects on the canvas have properties of their own in the context of the Ruleflow.

## Common properties

The following properties and buttons are common to many of these objects.

- **Name** - The default name from the source file. This name can be changed to whatever will improve comprehension of its context and function on the canvas, with no impact on the source file. To change the name on the canvas, double-click the instance on the canvas and re-name it.
-  - Color lets you choose from a color palette to override the default color that fills the object. See [How to add colors to Ruleflow objects](#) on page 126 for more information. You could also use preferred general colors for all aspects of canvas objects, as discussed in [Ruleflow preferences](#) on page 114
-  - For objects that are Corticon assets, lets you navigate to a different file of the object type that uses the same Vocabulary.

## Object specific properties

- **Rulesheet Activity - Rulesheet** is a valid `.ers` file in the project. You can select a different file but you cannot change the path or the name of the original file.
- **Ruleflow Activity - Ruleflow** is valid `.erf` file in the project. You can select a different file but you cannot change the path or the name of the original file.
- **Service Call-out - Service Name** pulldown menu listing service call-outs that are loaded into the workspace. The currently loaded one displays the unmodifiable **Description** specified by its author.
- **Branch Activity** - Defines the branch structure by choosing an appropriate attribute, listing values on which to branch, and then the node for each branch path. See the section "*Conditional branching in Ruleflows*" in the *Rule Modeling Guide*.

---

**Note: Comments on a Ruleflow and on Ruleflow Objects** - To add a comment to the Ruleflow or to the object in focus on the canvas, choose the Ruleflow menu command **Comment**. To review comments on this asset and its components, see [Use the Comments view](#) on page 165.

---

## Iteration

Iteration can be enabled for Rulesheet, Ruleflow, Branch and Subflow objects in a Ruleflow. When an object is set to iterate, it will repeatedly re-execute until the values derived by the object's rules cease to change. Once values in the object cease changing, the iteration stops and execution continues to the next object (as determined by the Connectors).

---

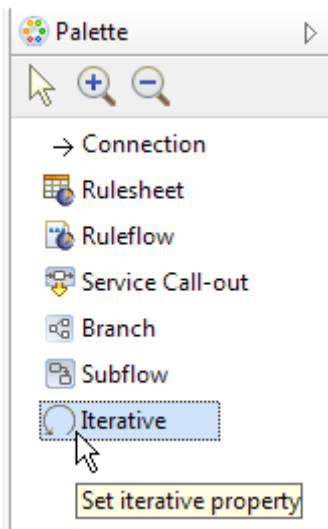
**Important:** Logical loop processing options are not related to these iterative functions.

---

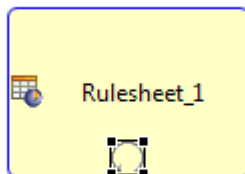
### Enabling and disabling iteration

To enable iteration:

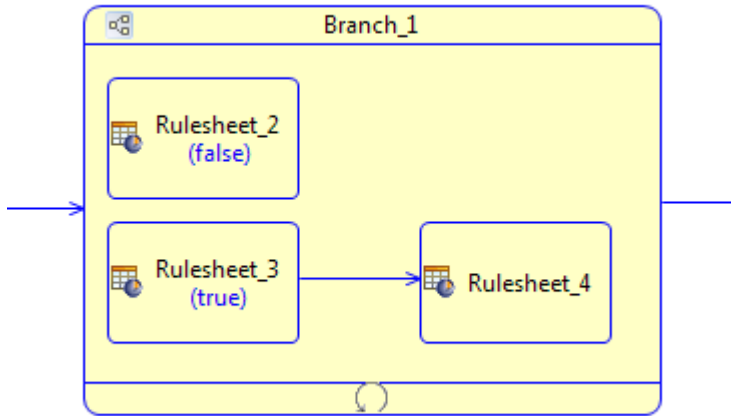
1. Click on the **Iterative** button on the palette to select it.



2. Click on the object where you want iterations enabled.
  - On a Rulesheet or Ruleflow object, click anywhere in the object. The iteration icon displays in the lower section of the object:



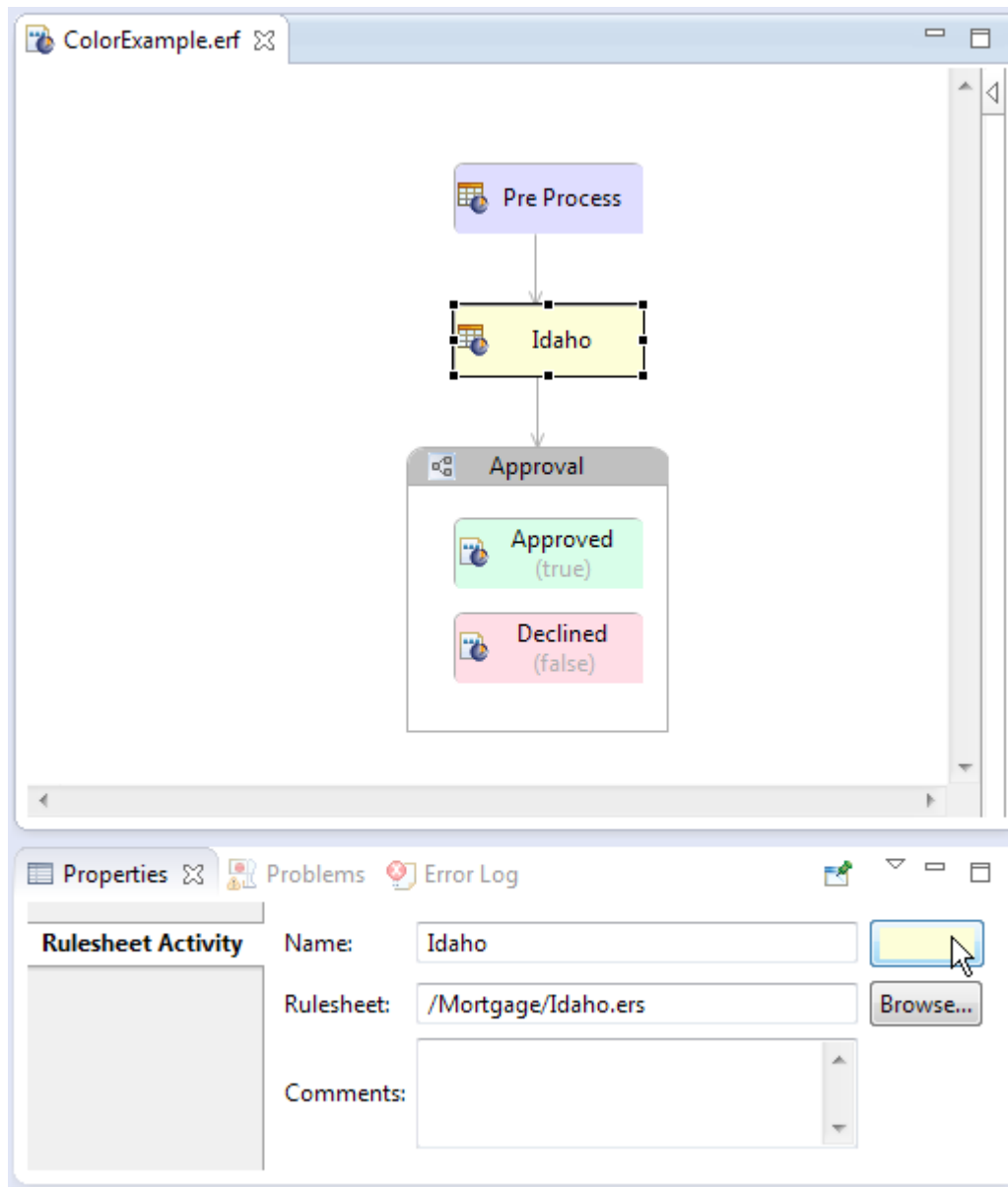
- On a Branch or Subflow object, click on the container's title bar. An iteration section is created at the bottom of the object with the iteration icon enclosed:



To disable iteration on an object, click on the iterative icon in the object to select it, and then press the **Delete** key.

## How to add colors to Ruleflow objects

You can add color to objects on the Ruleflow canvas to enhance the look and feel of the set of objects. Each object on the canvas provides a color button to set that objects color, as illustrated:



The color palette is the standard Windows basic 48-color palette that lets you choose to create custom colors.

**Note:** The color preference you set here on an object will override the color property set in **Window > Preferences > Viewruleflow Diagram > Appearance > Fill color**, as presented in [Ruleflow preferences](#) on page 114. When an individual object's color reverts to its default value, white, the underlying preference color is used.



---

# Ruletests

---

A Ruletest is a Corticon asset in a project yet it is not a deployable asset. Its purpose is to define testsheets, each of which accepts data input and expected results that you want to test against any of the Rulesheets and Ruleflows in the project, or against a corresponding deployed Decision Service.

For details, see the following topics:

- [Use AI Assistant in a Ruletest](#)
- [How to create a Ruletest](#)
- [Ruletest window](#)

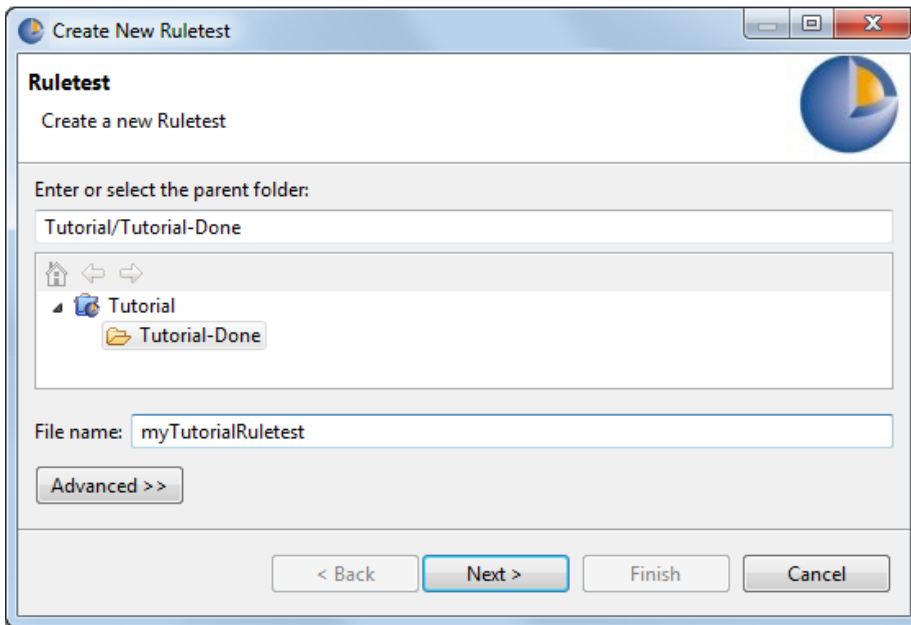
## Use AI Assistant in a Ruletest

The Corticon AI Assistant can help you explore, understand, and create rule assets directly in Corticon Studio. You can ask questions, generate documentation, create or test rules, and more—all from within the Assistant panel. See *Using the Corticon AI Assistant in this guide* for details.

## How to create a Ruletest

To create a new Ruletest:

1. Choose **File > New > Ruletest** from the menubar or click the down arrow next to the **New** icon on the toolbar and select **Ruletest**. Either method will launch the **Create a New Ruletest** wizard.



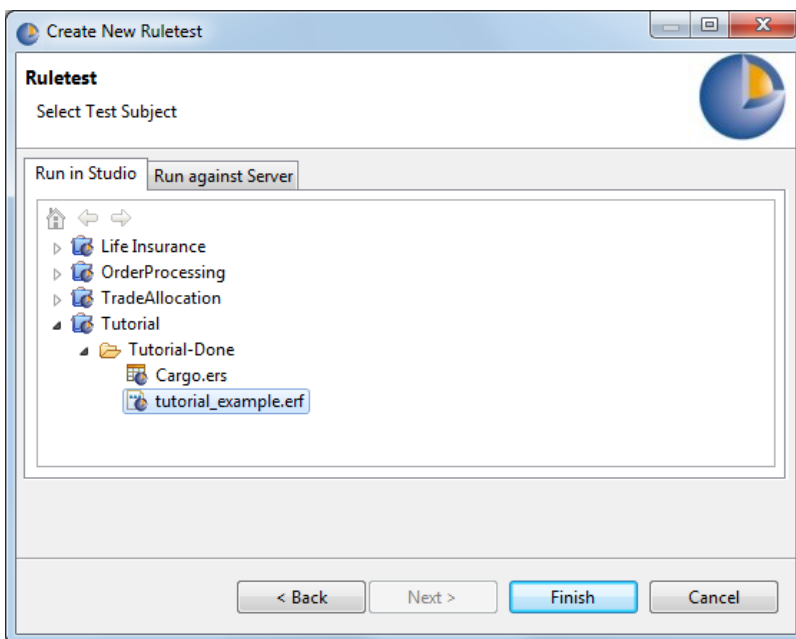
2. Select the **parent folder** for the new Ruletest, in our example `Tutorial/Tutorial-Done`.
3. Enter a file name for the new Ruletest, in our example `myTutorialRuletest`.

---

**Note:** The **Advanced** options are not relevant to Corticon and should not be used.

---

4. You can simply click **Finish** to accept the first Rulesheet or Ruleflow in the folder as the test subject. If you click **Next**, the **Select Test Subject** panel opens on its **Run against Studio** tab, as shown:



Choose the Rulesheet or Ruleflow file in the project that you want as the test subject, and then click **Finish**

---

**Note:** The dialog lists only the Rulesheet and Ruleflows in the parent project to ensure that you do not attempt to create cross-project assets.

---

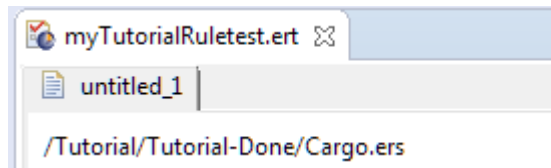
You can later change a testsheet's test subject to run against another Rulesheet or Ruleflow file in the same project file in Corticon Studio, or against an appropriate Decision Service deployed on a Corticon Server, as discussed in the following topics.

---

**Note:** You can also directly edit the test subject path on the testsheet. This feature, typically reserved for advanced users, will reject an invalid file but might not catch all the subtleties of the validation in the **Select Test Subject** dialog.

---

The Ruletest file opens in its editor with an initial Testsheet tab, `untitled_1` assigned to the selected test subject, as illustrated:



You can double-click on the Testsheet's tab to rename it.

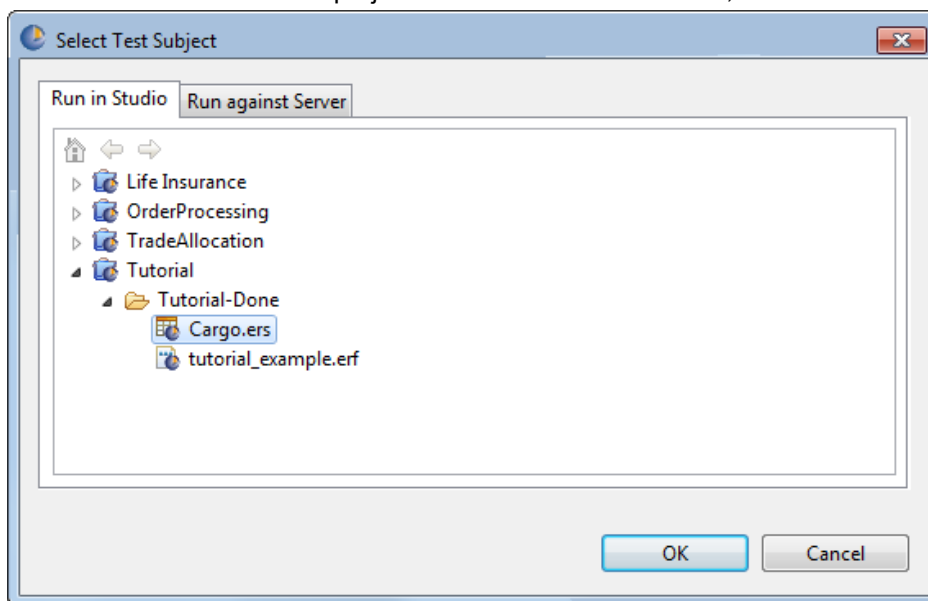
---

**Note:** For more about Testsheet tabs, see [How to add testsheets](#) on page 150 and [How to rename testsheets](#) on page 152

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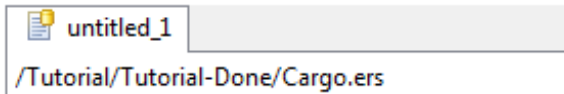
## Choose a test subject in the Studio workspace

1. In the Ruletest you want to test, open it in its editor, and then choose the menu command **Ruletest > Testsheet > Change Test Subject**. The **Select Test Subject** dialog box opens on its **Run in Studio** tab. Notice that the view of the projects in the current workspace shows only Rulesheets and Ruleflows. Choose one of the files in the same project as the Ruletest to select it, as shown:



2. Click **OK**.

The dialog closes, and the selected file is listed at the top of the testsheet, as shown:

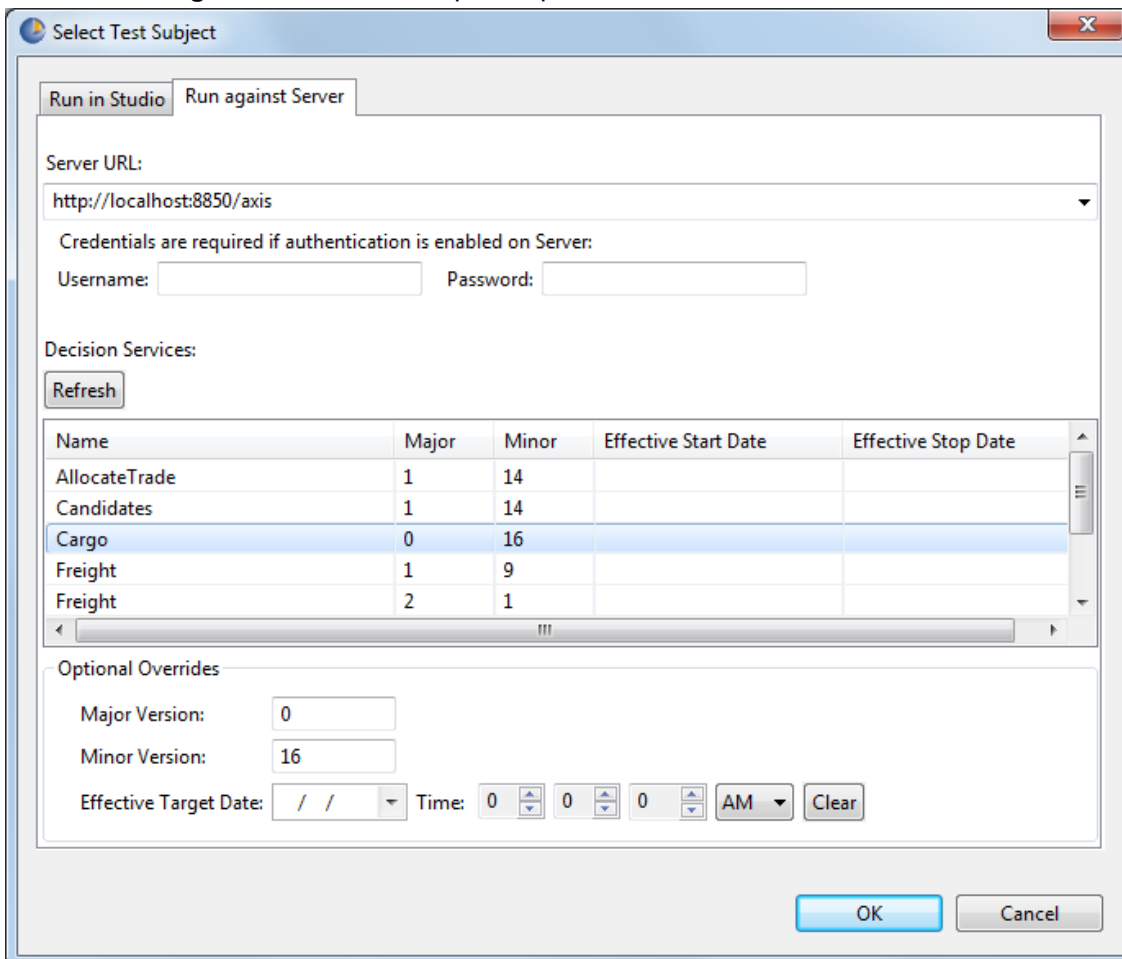


## Choose a test subject that is a deployed Decision Service

A Ruletest can specify a test subject deployed as a Decision Service on a Corticon Server that defines effective date and version properties. From the Studio point of view, such a server is often referred to as a *remote server*. By setting a target date, a test can execute as though it were sent at a specific date and time. Using this feature enables setting the clock back to see how past date ranges would have handled a request, as well as setting the clock forward to test deployed Decision Services in pre-production staging.

**To use a Decision Service on a remote server as the test subject:**

1. In the Ruletest you want to test open in its editor, choose the menu command **Ruletest > Testsheet > Change Test Subject**. The **Select Test Subject** dialog box opens.
2. Click the **Run against Server** tab to open its panel, as shown:



3. For the **Server URL**, enter a URL; for example, a Java Server installed (and running) on the same machine as the Studio: `http://localhost:8850/axis` (use your appropriate port number). Your entry is validated when you click **Refresh**, and persisted in your Studio. Once you have persisted URLs, click on the right side of the Server URL area to open the dropdown menu to make your selection.

**Note:** Only a few Server URLs are persisted this way. If you have a larger list that you want to edit, see [Specify server URLs for access to test subjects](#) on page 133

Click **Refresh** to populate the list of deployed Decision Services on that server.

- Click on an appropriate Decision Service for this Ruletest:

| Name          | Major | Minor | Effective Start Date | Effective Stop Date |
|---------------|-------|-------|----------------------|---------------------|
| AllocateTrade | 1     | 14    |                      |                     |
| Candidates    | 1     | 14    |                      |                     |
| Cargo         | 1     | 0     |                      |                     |
| ProcessOrder  | 1     | 10    |                      |                     |

- You can click **OK** at this point if you do not want to apply the optional overrides.
- When the selected Decision Service was deployed with a date range defined, it is active from the effective date through the expiration date. You can apply overrides to change the test Decision Service's version or to simulate the Ruletest's call as occurring at a specific point in time. Specify your preferred values -- major version + effective target date -- as illustrated:

Optional Overrides

Major Version:

Minor Version:

Effective Target Date:  Time:  :  :

- Click **OK**. The dialog closes. The details of the remote server and Decision Service specifications are displayed at the top of the Testsheet:

untitled\_1  
[http://localhost:8850/axis?name=Cargo,major version=1,effective target date=01/29/16 12:00:01 AM](http://localhost:8850/axis?name=Cargo,major%20version=1,effective%20target%20date=01/29/16%2012:00:01%20AM)

- Run the Ruletest.

The test executes against the specified Decision Service on the selected server using the overrides you entered.

## Specify server URLs for access to test subjects

You can add a few additional server URLs through direct input, but only a few are persisted before rolling over their list.

When you have more than a few remote servers that you want to access to use their deployed Decision Services as Ruletest test subjects, you can and edit their connection information to the Studio's properties file.

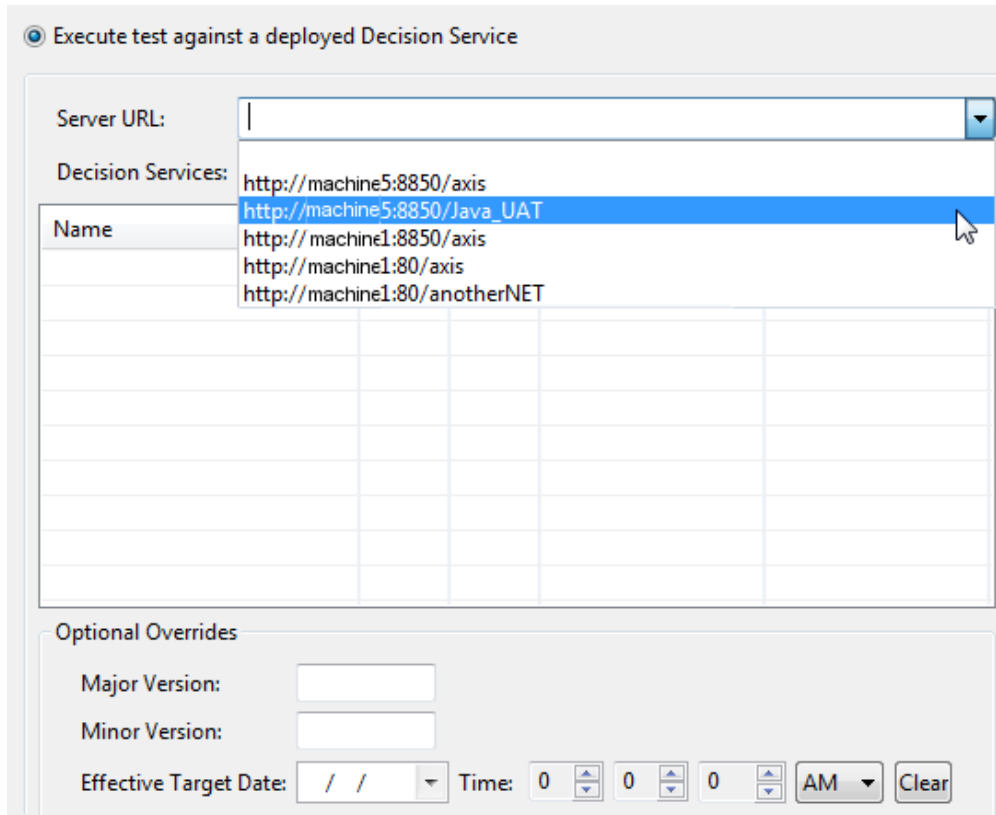
### To extend the test subject's Server URL list:

- In Studio's `brms.properties`, add `com.corticon.deployment.soapbindingurl_` lines with unique integer values and the server's URL. For this example, two .NET server applications, and three Java web services on port 8850 were defined in the following lines:

```
com.corticon.deployment.soapbindingurl_1=http://machine5:8850/axis
com.corticon.deployment.soapbindingurl_2=http://machine5:8850/Java_UAT
com.corticon.deployment.soapbindingurl_3=http://machine1:8850/axis
```

```
com.corticon.deployment.soapbindingurl_4=http://machine1:80/axis
com.corticon.deployment.soapbindingurl_5=http://machine1:80/anotherNET
```

2. The **Select Test Subject** dialog's **Server URL** list the various host-port-context URLs you specified:



## Ruletest window

A Ruletest is the mechanism within Corticon Studio for creating use cases or test scenarios of sample data and sending them to a Rulesheet or Ruleflow for processing. Ruletests consist of one or more Testsheets which test independent Rulesheets or Ruleflows, or can be linked together to test a succession of Rulesheets or Ruleflows to simulate a process sequence.

Opening a Ruletest or making a Ruletest the active Corticon Studio window causes the Studio menubar and toolbar to display the tools needed to test Rulesheets and Ruleflow.

Rulesheets, as individual files, may only be tested using a Corticon Studio Ruletest. In order to deploy and test using Corticon Server, Rulesheets must be packaged as Ruleflows before they can be executed. Ruleflows may be tested both in Corticon Studio using Ruletests and on Server using standard request messages.

## Ruletest menu commands

The following menu is available when the Ruletest editor is the active window.

The **Ruletest** menu has the following items:

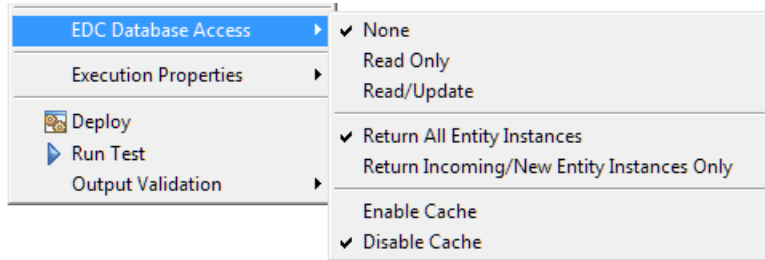
- **Testsheet**
  - **Add Testsheet** —Inserts a new Testsheet.

- **Remove Testsheet** —Deletes the specified Testsheet.
- **Link To Previous Testsheet** —Causes the Input panel of the second Testsheet to be populated with the date from the Output panel of the first.
- **Change Test Subject**—Opens a window that lets you select a new Rulesheet or Ruleflow to test in Corticon Studio, or a Decision Service to test where it is deployed on a Corticon Server.
- **Cut Testsheet**—Cut the active Testsheet.
- **Copy Testsheet**—Copy the active Testsheet.
- **Paste Testsheet** —Paste the active Testsheet.
- **Rename Testsheet** —Opens an entry window to change the Testsheet name.
- **Move Backward**—Moves the selected Testsheet tab one tab towards the beginning of the Ruletest.
- **Move Forward** —Moves the selected Testsheet tab one tab towards the end of the Ruletest.
- **Move To Beginning** —Moves the selected Testsheet tab directly to the start of the Ruletest.
- **Move To End** —Moves the selected Testsheet tab directly to the end of the Ruletest.
- **Add Comments to Testsheet**—Opens the **Add Comment** window to add and display a comment of up to 200 characters to the one selected item in the Input column. When no item is selected, the comment applies to the Testsheet – it can be of indeterminate length, and will be added to a Ruleflow report.
- **Import**
  - **XML/SOAP from File**—Import a valid CorticonRequest XML document into Corticon Studio as a Ruletest.
  - **JSON from File**—Import a valid CorticonRequest JSON document into Corticon Studio as a Ruletest.
- **Data**
  - **Set to Null** —Resets the selected Testsheet tree node to null.
  - **Go to Entity** —Displays an entity when an association tree node is selected.
  - **Sort Entities** —Sorts entity nodes alphabetically by name. One entity must be selected.
  - **Properties** —Displays the Ruletest Properties window.
- **Input**
  - **Export Request XML to File** —Exports the active Testsheet's Input pane as a CorticonRequest XML document.
  - **Export Request SOAP to File**—Exports the active Testsheet's Input pane as a CorticonRequest XML document with SOAP envelope.
  - **Export Request JSON to File**—Exports the active Testsheet's Input pane as a CorticonRequest JSON document.
  - **Exclude Transients**—When checked, ignores attribute values that are transient data mode in the export file. Toggling this setting under one tree toggles it for Input, Output, and Expected.
  - **Generate Data Tree** —Constructs the minimum Input data structure necessary to test the chosen Rulesheet. Uses the Rulesheet's scope for guidance.
- **Output**
  - **Export Response XML to File** —Exports the active Testsheet's Output pane as a CorticonResponse XML document.

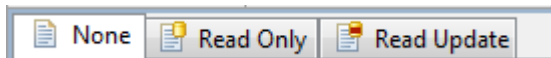
- **Export Response SOAP to File**—Exports the active Testsheet's Output pane as a `CorticonResponse` XML document with SOAP envelope.
- **Export Response JSON to File**—Exports the active Testsheet's Output pane as a `CorticonResponse` JSON document.
- **Exclude Transients**—Ignores attribute values that are transient data mode in the export file. Toggling this setting under one tree toggles it for Input, Output, and Expected.
- **Copy to Expected** —Copies the data in the Output panel to the Expected panel.
- **Expected**
  - **Export Response XML to File**—Exports the active Testsheet's Expected pane as a `CorticonResponse` XML document.
  - **Export Response SOAP to File**—Exports the active Testsheet's Expected pane as a `CorticonResponse` XML document with SOAP envelope.
  - **Export Response JSON to File** —Exports the active Testsheet's Expected pane as a `CorticonResponse` JSON document.
  - **Exclude Transients**—Ignores attribute values that are transient data mode in the export file. Toggling this setting under one tree toggles it for Input, Output, and Expected.
- **Export WSDL** —Create a WSDL directly from the Input pane of a Ruletest. For more information about using WSDLs to integrate Decision Services, see the *Deployment Guide*
- **EDC Database Access** —*See the following section for details.*
- **Execution Properties** —Toggles suppression of each of the message types and test output in test results. *See the section below for more information.*
- **Deploy** —Compiles the Ruletest target without executing it.
- **Run Test** —Compiles (if needed) and executes Ruletest.
- **Run Test with Rule Trace** —Compiles (if needed) and executes Ruletest and produces the Rule Trace details.
- **Output Validation > Validate** —Reruns the color-coded validation of the Output and Expected data. *See "Review test results when using the Expected panel" in the Rule Modeling Guide..*
- **Run All Tests** —Executes all Testsheets in the Ruletest.
- **Run All Tests with Rule Trace**—Compiles (if needed) and executes all Testsheets in the Ruletest and produces the Rule Trace details.
- **Report** —Creates an HTML report and launches your browser for viewing. *See "Creating a Ruletest Report" in this Guide.*
- **Remove Invalid Nodes**—Discards all invalid nodes in Input, Output, and Expected columns in all Testsheets in the Ruletest.

## EDC Database Access options

The Testsheet options that are available when you are connecting to a database through the Enterprise Data Connector are:



The first option group determines, when not set to **None**, whether the Vocabulary's database connection is intended to provide **Read Only** or **Read/Update** access to the database. The chosen option decorates the testsheet's tab as stylized here where the sheet name is appropriate to its database access selection:



The second option group determines what is returned in response messages. It does not apply when Database Access is **None**.

- **Return All Entity Instances**—Instructs Corticon Server to return all entities (queried during the course of rule execution) in the response message.
- **Return Incoming/New Entity Instances Only**—Instructs Corticon Server to return only entities which were directly used in the rules, present in the request message, and/or generated by the rules (if any).

For more information, see the topic *"How data from an EDC Datasource integrates into rule output" in the "Advanced EDC topics" section of the Data Integration Guide.*

The third option group, **Enable Cache** or **Disable Cache**, determines whether the Testsheet should Enable Cache or Disable Cache when running tests. This features requires that you set Vocabulary and Rulesheets to use caching. It does not apply when Database Access is **None**.

For more information, see the topic *"How to work with database caches" in the Data Integration Guide.*

## Execution Properties

When you choose to suppress selected level of messages in server output and logs, you might want to see that same behavior in your Ruletests first. These settings restrict each of the three types of Rule Messages (info, warning, and violation) from being posted to the output of an execution. They are test server settings that correspond to the Corticon Server properties:

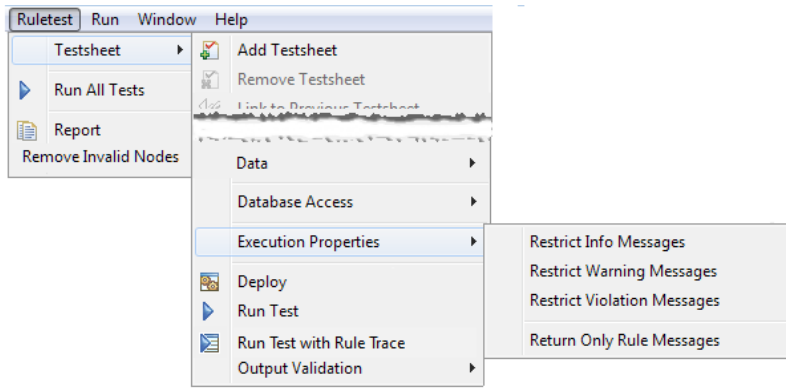
```
com.corticon.server.restrict.rulemessages.info
com.corticon.server.restrict.rulemessages.warning
com.corticon.server.restrict.rulemessages.violation
```

Also, you can choose to suppress the work document output in server output and logs, and you can test that same behavior (suppressing the **Output** pane) in your Ruletests first.

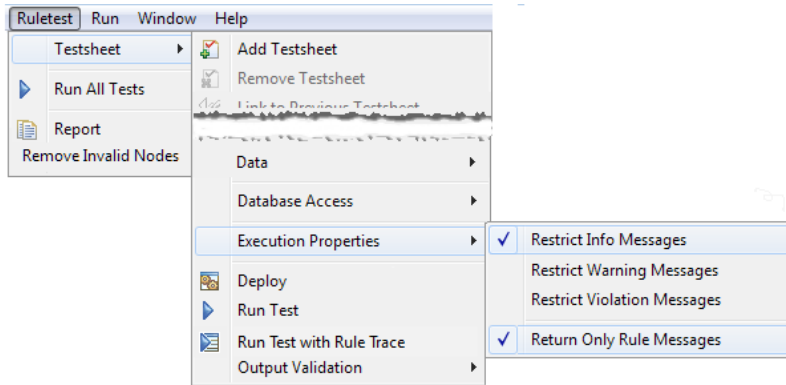
The following execution property suppresses the creation of the output pane, and displays just rule messages:

```
com.corticon.server.restrict.response.rulemessages.only
```

You can see the impact of these restrictions in testsheets by engaging each of the toggles under **Execution Properties** on the **Ruletest > Testsheet** menu as shown:



When an option is checked, messages of that type are suppressed:



Clicking an option again clears it, so that the message type or output is again produced.





Importing that message will toggle—in this example—the corresponding Testsheet options, **Restrict Info Messages** and **Return Only Rule Messages**.
















## Ruletest toolbar

When the Ruletest editor is active, its tools are added to the toolbar, as shown:



The Ruletest tools provide the same functions as the corresponding **Ruletest > Testsheet** menu commands:

-  **Add Testsheet**
-  **Remove Testsheet**
-  **Link to Previous Testsheet**
-  **Change Test Subject**

-  **Cut Testsheet**
-  **Copy Testsheet**
-  **Paste Testsheet**
-  **Rename Testsheet**
-  **Move Backward**
-  **Move Forward**
-  **Move to Beginning**
-  **Move to End**
-  **Copy Output to Expected**
-  **Validate**
-  **Scroll Lock**
-  **Add Comment**
-  **Deploy**
-  **Run Test**
-  **Run Test with Rule Trace**

## Commands on a Testsheet context-sensitive menu

When you right-click in a Testsheet, the Ruletest context-sensitive menu opens, displaying the following commands and toggles as appropriate to certain columns and data types:

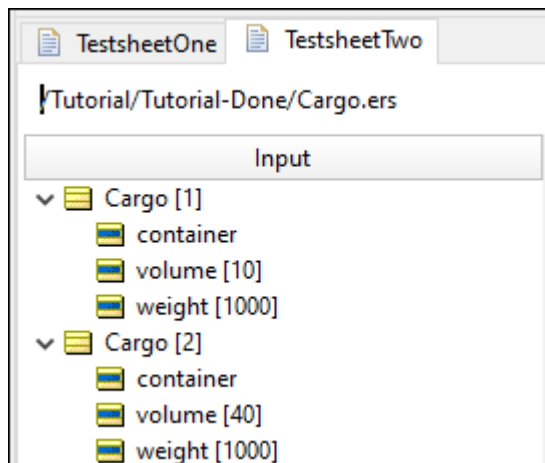
| Command                 | Columns                    | Comments   |
|-------------------------|----------------------------|--|
| Cut                     | Input, Output, or Expected | Any line(s) in a column. Selects the branches under each selected level as well.   |
| Copy                    | Input, Output, or Expected | Any line(s) in a column. Selects the branches under each selected level as well.   |
| Paste                   | Input or Expected          | Valid target location in column.   |
| Delete                  | Input, Output, or Expected | Any line in a column. Selects the branches under each selected level as well.  |
| Collapse All/Expand All | Input, Output, or Expected | Collapses and Expands the items in a test tree. These menu options operate on each tree separately. The previous expansion state of any children is lost by using these options.   |
| Set to Null             | Input or Expected          | Applies only to attributes. Use <b>CTRL+click</b> or <b>SHIFT+click</b> to choose several attributes.  |
| Ignore Validation       | Expected                   | Right-click on a node and chose <b>Ignore Validation</b> from the pop-up menu, all instances of that node in that view are ignored during the validation stage of testing, not just the single instance you selected. Each occurrence of that node that appears in the view is grayed-out to indicate that all of them are ignored during validation. You can toggle <b>Ignore Validation</b> on or off. |
| Key Attribute           | Expected                   | Applies only to attributes. Use <b>CTRL+click</b> or <b>SHIFT+click</b> to choose several attributes.  |
| Go to Entity            | Input or Expected          | Selected association.  |
| Sort Entities           | Input or Expected          | Anywhere in selected column sorts to the entire column.  |

| Command                    | Columns                    | Comments  |
|----------------------------|----------------------------|---|
| Scroll Lock                | Anywhere on sheet          | Synchronizes scrolling of all three columns.  |
| Export JSON to File        | Input, Output, or Expected | Exports the selected pane in the active Testsheet in JSON format.   |
| Export JSON to Clipboard   | Input, Output, or Expected | Exports the selected pane in the active Testsheet in JSON format to the clipboard.  |
| Import JSON from Clipboard | Input, or Expected         | Import into a selected Tester Tree from JSON saved in the Clipboard. Updates the currently selected Tester Tree in the current Testsheet. You get notified that pasted data will overwrite existing data. |
| Export JSON                | Input, Output, or Expected | Exports the selected pane in the active Testsheet in JSON format.   |
| Export SOAP to File        | Input, Output, or Expected | Exports the selected pane in the active Testsheet in SOAP format.   |
| Export XML to File         | Input, Output, or Expected | Exports the selected pane in the active Testsheet in XML format.  |

| Command                   | Columns            | Comments  |
|---------------------------|--------------------|---|
| Import XML from Clipboard | Input, or Expected | Import into a selected Tester Tree from XML saved in the Clipboard. Updates the currently selected Tester Tree in the current Testsheet. You get notified that pasted data will overwrite existing data.  |
| Properties                | Anywhere on sheet  | <p>Opens the Ruletest's <b>Properties</b> panel which provides the following tabs:</p> <ul style="list-style-type: none"> <li>• <b>Ruletest</b> - The Vocabulary file associated with this Ruletest</li> <li>• <b>Testsheet</b> - The Rulesheet or Ruleflow file associated with the Ruletest.</li> <li>• <b>Datastore ID</b> - When the selected item is an association, allows a datastore identifier to be entered. This is important when using the Enterprise Data Connector. For more information, see the topic <i>"Identity Strategies" in the Relational database concepts section of the Data Integration Guide.</i></li> </ul> |

## Testsheet tabs

A Ruletest contains **Input**, **Output** and **Expected** panels. Ruletests you create are displayed in the **Project Explorer** window. You can navigate between open Testsheets by clicking the Testsheet's tab to make it active.

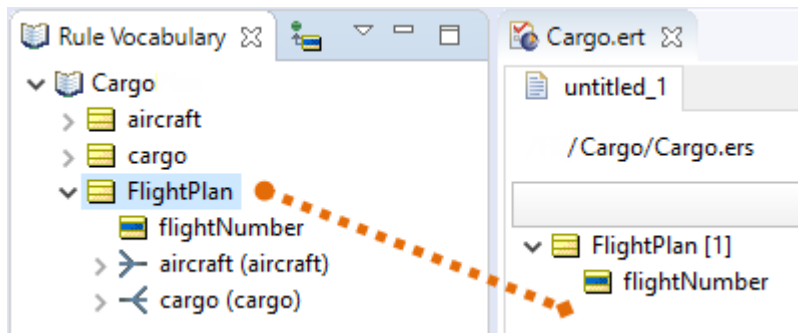


## Populate the input panel

Creating a set of test data in the **Input** panel is also called creating the “test tree”, since the Input data structure uses the same “nodes” as the **Rule Vocabulary** window and arranges them in the same “tree view”.

### Add entities to the test tree

Drag and drop entity nodes from the **Rule Vocabulary** window onto the Testsheet as shown to the right. When creating new root-level entities, the nodes may be dropped anywhere on the Input panel of the Testsheet.




---

**Important:** Entities may be deleted by pressing the **Delete** key or by selecting **Delete** from the right-click pop-up menu.

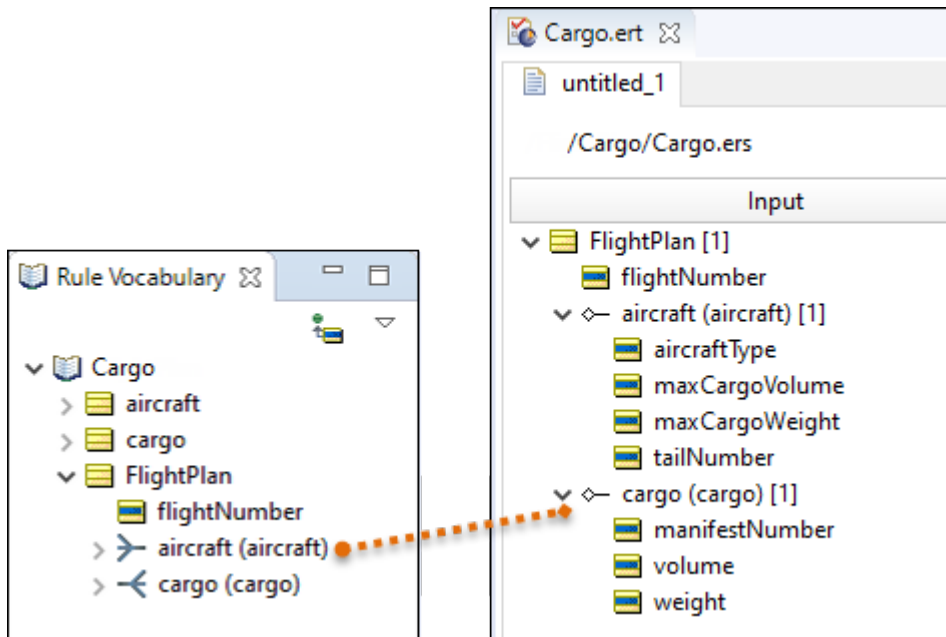
---

### Create associations in the test tree

Creating an association adds an instance of the selected entity in the Testsheet, but this is different from creating an instance of a root-level entity by itself (without forming the association to the “parent” entity). An association creates a link between entities; if this did not exist, there would be no direct relationship between them.

To create an association:

1. Drag and drop the association for the specified “child” entity **directly on top of** the “parent” entity, as indicated by the orange line in this illustration, from the **Rule Vocabulary** window into the Input panel.



2. Verify that the child entity has the appropriate “indented” structure underneath the parent entity, indicating the association has been created correctly.

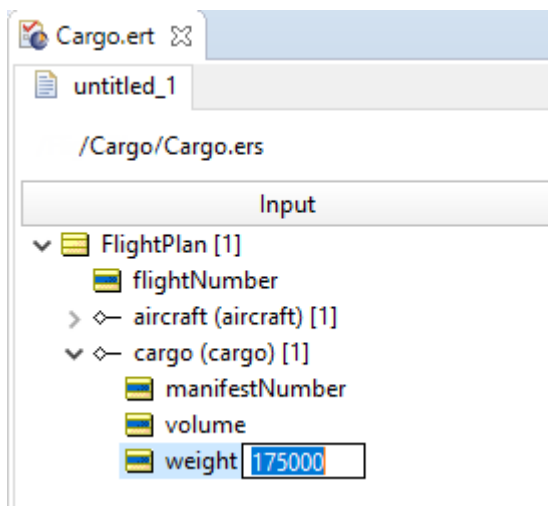
---

**Important:** Be careful to follow precisely the orange line in these illustrations, which shows that the association must be dragged from the Vocabulary and dropped **directly onto** the yellow entity icon to which it is being associated. Dropping the association on an empty or incorrect portion of the Testsheet will produce a message informing you that the association request was ignored.

---

## Assign attribute values in the test tree

1. Double-click on the attribute where you want to enter data. Its data entry box opens.
2. Type the test value for that attribute:



3. Either:
  - Press **Enter** to record the entry

- Press **Tab** to record that entry, and then advance to the entry box of the next attribute.

## Automatically generating a test tree

When creating a Ruletest, it is important to provide the input data required by the Rulesheet being tested. Without the necessary input data, the rules cannot create the expected output.


Creating a test tree manually can be tedious for very large Rulesheet test subjects. Corticon Studio provides a way to simplify and speed up the process.

**Generate Test Tree** is an option in Corticon Studio menu **Ruletest > Testsheet > Data > Input** that automatically analyzes the Vocabulary terms used by the Rulesheet and generates the corresponding tree structure in the Input pane of the Testsheet. The input of specific data *values* for the attributes still must be performed manually, but the tree *structure* is created automatically.

When a Vocabulary association between two entities is one-to-many, then the **Generate Test Tree** feature will create 2 instances (copies) in the tree. You can add more to test a larger collection, or delete them to test a smaller collection. You can always edit the resulting test tree by adding or removing terms.


## Execute tests

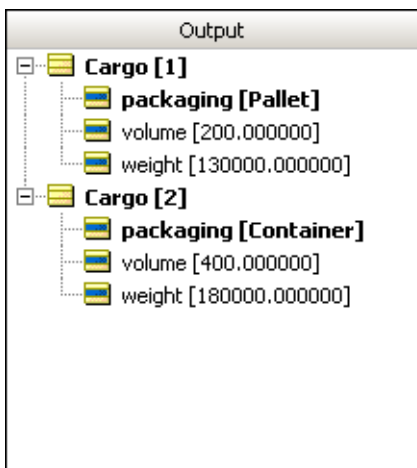
Before a Ruletest can be executed, the corresponding Rulesheets (whether being tested directly or as contained in Ruleflows) must be compiled. This compilation process does not occur until the Ruletest is run. Depending on how many Rulesheets and rules must be compiled, this compilation step may take a few seconds.

Each time a change is made to a rule in a Rulesheet referenced by the Ruletest, the rules will need to be re-compiled. This recompilation will occur automatically when **Run Test**  is selected. This will cause a brief delay in execution while the new compilation is performed.

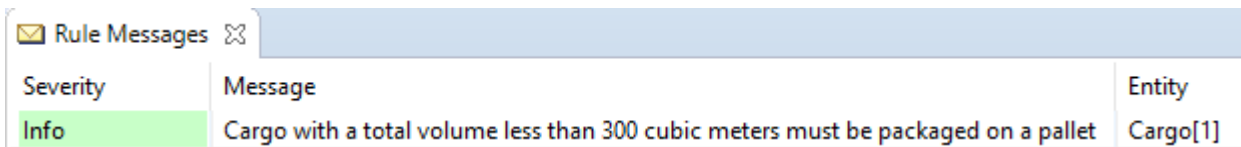
Once a Ruletest has been executed, it will rerun without recompiling as long as the rules have not changed since the last execution. Changing the Input test data does not require recompilation.

To compile rules *without* running them, a special **Deploy** toolbar option is provided: .

1. Execute the test by choosing **Ruletest > Testsheet > Run Test** or  on the toolbar.
2. Check the outcome of the test in the **Results** panel.



- Test results are displayed in regular type style. Parts of the test tree (“nodes”) modified by the Server are shown in **bold** black text. Any errors are shown in red.



| Severity | Message   | Entity   |
|----------|---|----------|
| Info     | Cargo with a total volume less than 300 cubic meters must be packaged on a pallet | Cargo[1] |

- Posted rule statements appear in the **Rule Messages** window at the bottom of the Testsheet. In addition to the **Message** and **Severity** columns, the box also displays the **Entity** node to which the rule statement has been posted. In the example above, the Rule Message displayed was posted, or “linked” to Cargo[1]. This means that it was the data contained in Cargo[1] which caused the rule corresponding to the posted Rule Statement to fire.
- Make any necessary adjustments to the Rulesheet, save and re-test by repeating steps 1-5.

## Sequence of message posting

Message posting normally occurs at the tail end of a rule's execution – a sort of “final action” even though not technically an action like expressions in Action rows.

An exception to this behavior occurs for Column 0. A rule statement with **Ref** = 0 posts at the *beginning* of Rulesheet execution. If you want to force your rule statements in Column 0 to post after the Action rows execute, use **Ref** values of A0, B0, and so on (rather than 0.)

## Sort messages

Messages posted by rules and displayed in the **Rule Messages** window are a useful tool for understanding and troubleshooting Rulesheet execution. Messages displayed can be sorted in the following ways:

- When the **Severity** header is clicked, the messages sort by severity level first (Info then Warning then Violation), then in order of generation, with earlier messages posted higher in the table.
- When the **Message** header is clicked, the messages sort in order of generation, with the first message generated displayed in the first row.
- When the **Entity** header is clicked, the messages sort in ascending order by entity name/number, then in order of generation.

When any Rule Message row is clicked, the corresponding Entity highlights in the **Output** panel above. This provides a convenient way of navigating among the data in a large data set, rather than vertically scrolling.

## Format of output data

Data in the Output pane is displayed in the same format as the Input. You can adjust settings for some preferences:

- Decimal scale** - Default precision for Decimal values. All Decimal values are rounded to the specified number of decimal places. Default value is 6. For example, 4.6059556 will be rounded, displayed, and/or returned as 4.605957. In the `brms.properties` file, set the Studio Test's decimal scale:

```
decimalscale=2
```

When set to 2, the rounded value is 4.61.

- **Messaging Style** - You can change the messaging style to force full-time hierarchical or flat Output, regardless of the Input structure.

In the `brms.properties` file, set the Studio Test's XML messaging style:

- Hier (hierarchical)
- Flat
- Autodetect

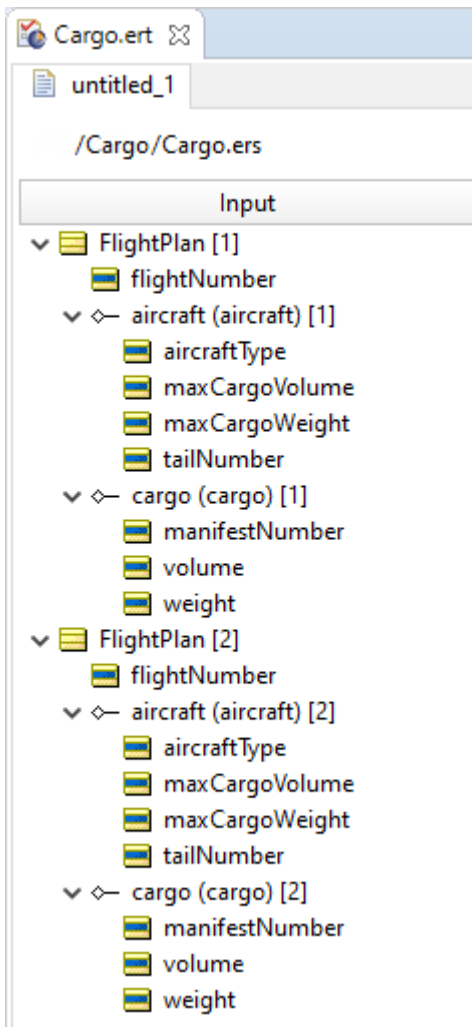
The default value is Hier:

```
com.corticon.designer.testers.xmlmessagingstyle=Hier
```

For more information about flat and hierarchical data formats, including examples, see the Integrating Decision Services chapter of the *Deployment Guide*.

## Create multiple test scenarios on the same testsheet

1. To test more than one scenario with the same Input panel, drag as many entity nodes from the Rule Vocabulary as you need. You can drag and drop as per standard procedure, or copy and paste elements already in the Input panel.



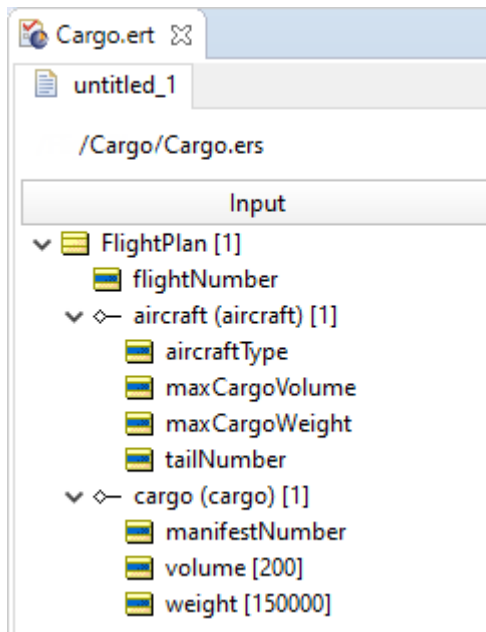
2. New elements are automatically numbered to ensure a unique ID for each.
3. Additional descriptive text can be added to each item in the **Input** column node by right-clicking the item, and then entering the type and text you want. As there can only be one comment per item, once you have added a comment, the menu item is no longer available. You must access and update or extend the existing comment.

The comments in the Input column will propagate to the Results column after you run a test.

## Create multiple test scenarios as a set of testsheets

You might find it more convenient to organize multiple scenarios into a set of Testsheets, each scenario with its own **Input**, **Output**, and **Expected** panels.

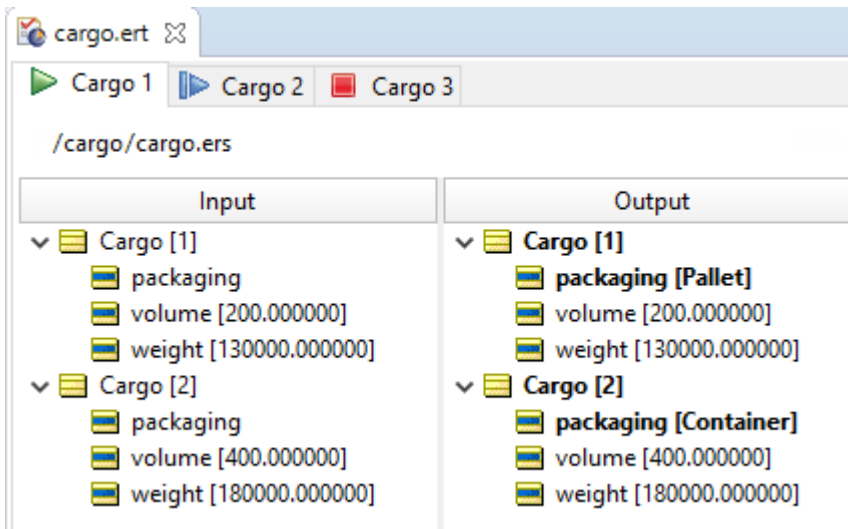
1. Each **Input** panel must be linked to a Rulesheet or Ruleflow.
2. Each **Input** panel will generate its own **Output** panel. Each of these Testsheet tabs can be [renamed](#) to help you distinguish them.




## Create a sequential test using multiple testsheets

Multiple Rulesheets and Ruleflows can be tested in an integrated scenario by linking them together in a single Ruletest. This simulates a complex series of decisions or a part of a business process. Assume we want to test a Rulesheet, a Ruleflow, and another Rulesheet in sequence as **Cargo 1**, **Cargo 2** and **Cargo 3**.

1. Create a Ruletest in the project, name it `cargo.ert`, and choose `Cargo.ers` as the test subject.
2. Add data, and then execute the Ruletest to generate data in the Output panel.
3. Add a new Testsheet by choosing **Ruletest > Testsheet > Add Testsheet**, choose the file `cargo2.ers`, and then name it **Cargo 2**.
4. Add another new Testsheet by choosing **Ruletest > Testsheet > Add Testsheet**, choose the file `flightPlan.ers`, and then name it **Cargo 3**.
5. Click on the **Cargo 3** tab, and then choose **Ruletest > Testsheet > Link to previous testsheet**. The tab is decorated with a red square and the adjacent tab is decorated with a blue arrow. The data from the Output panel of the previous Testsheet displays in the Input panel of the new Testsheet.
6. Click on the **Cargo 2** tab, and then choose **Ruletest > Testsheet > Link to previous testsheet**. The tab's blue arrow is now decorated with a split, and the adjacent tab is decorated with a green arrow. The data from the Output panel of the previous Testsheet displays in the Input panel of the new Testsheet. Here is how the tabs will look:

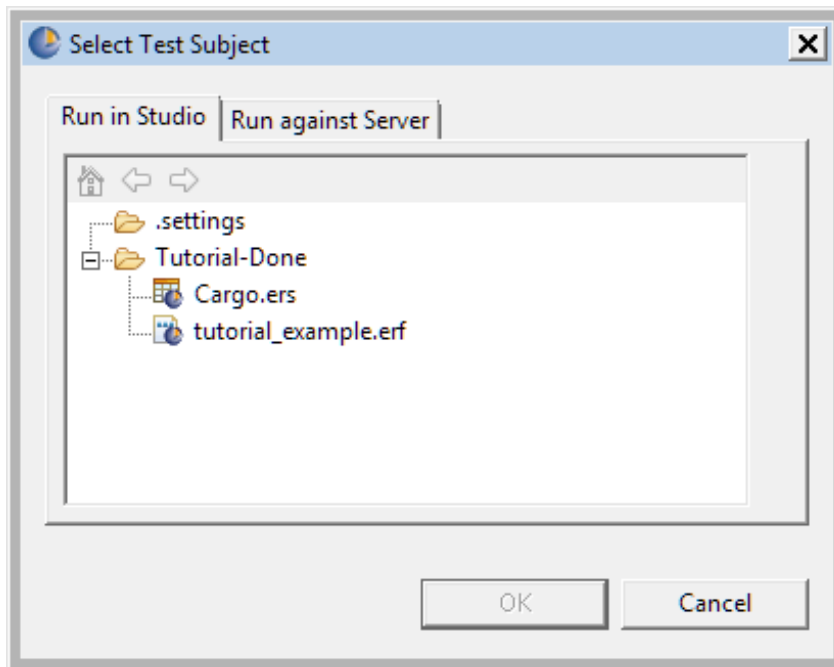


Repeat for as many new Testsheets as needed to model the sequence. You can execute one sheet at a time by selecting  from the toolbar, or execute all at once by selecting **Ruletest > Run All Tests**.

## How to add testsheets

To add a Testsheet to the Ruletest in its editor, select the menu command **Ruletest > Testsheet > Add Testsheet**.

The **Select Test Subject** dialog box opens on its **Run in Studio** tab, as illustrated:



For the test subject, either:

- Click on a listed Rulesheet or Ruleflow, as described in [Choose a test subject in the Studio workspace](#) on page 131
- Choose a target on a server as described in [Choose a test subject that is a deployed Decision Service](#) on page 132

Click **OK**.

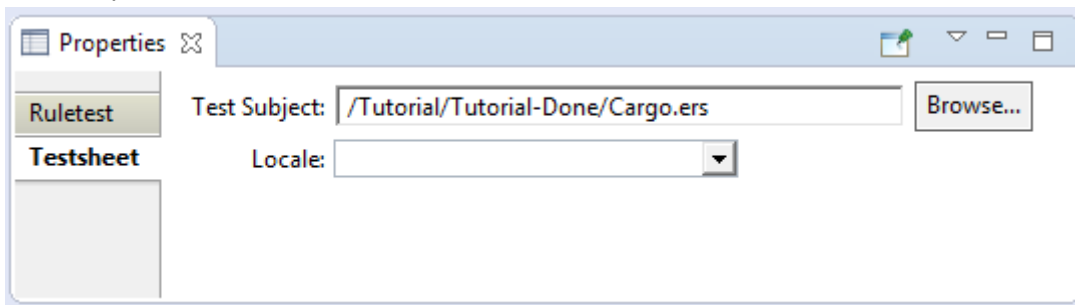
Corticon Studio creates a tab at the end of the current set of tabs, assigns the new tab a default name, and then opens the new Testsheet.

## How to set the locale on a testsheet

The Studio enables you to pass the locale for a request into its Tester. The setting applies to tests run in Studio and run against Server. The chosen locale property is then stored with the Testsheet, and any exported XML or JSON files from the Testsheet. If the Locale is not set, then a Locale value is not sent in the request. The default value is the Server default.

### To set the locale on a Testsheet:

1. Open the Ruletest in its editor, and then choose a Testsheet on which you want to set the locale.
2. In its Properties section, choose the **Testsheet** tab, as illustrated:



3. On the **Locale** dropdown menu, choose the locale for this Testsheet.
4. Save the Rulestest.

When you run the Testsheet, the selected locale is applied. For example, where the locale is set to `French`, the requests exported from Tester have the following header lines:

### XML

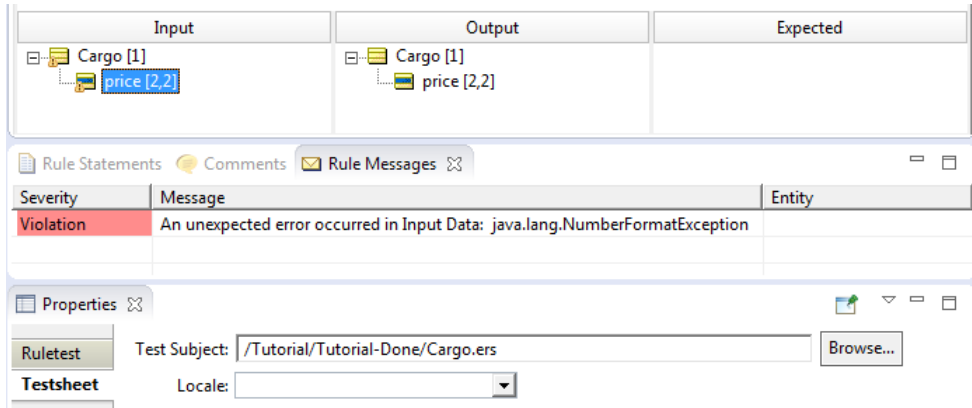
```
...
<ExecutionProperties>
  <ExecutionProperty name="PROPERTY_EXECUTION_LOCALE" value="fr" />
</ExecutionProperties>
```

### JSON

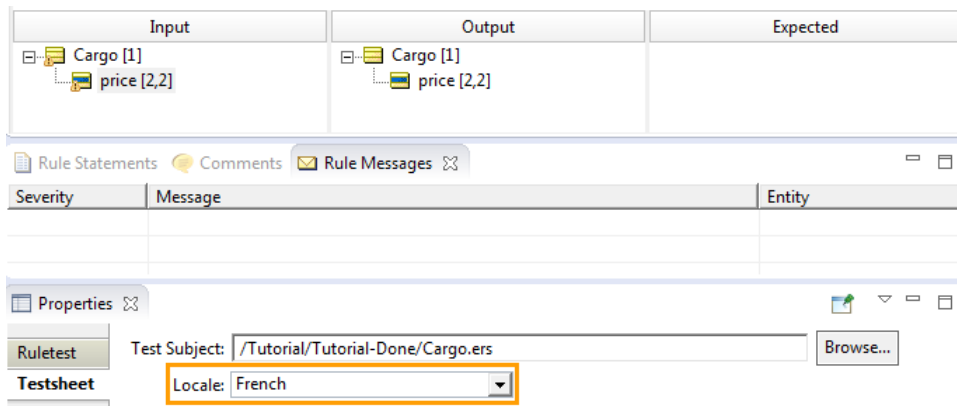
```
{
  "__metadataRoot": {"#locale": "fr"},
  "Objects":
```

## Use case in the Ruletest editor

For a given property that is a decimal value, illustrated as `price` in this example, entering the value `2,2` is shown to be an error in the default locale:



Setting the locale to French, the comma delimiter for a decimal value is correct. The value is valid:

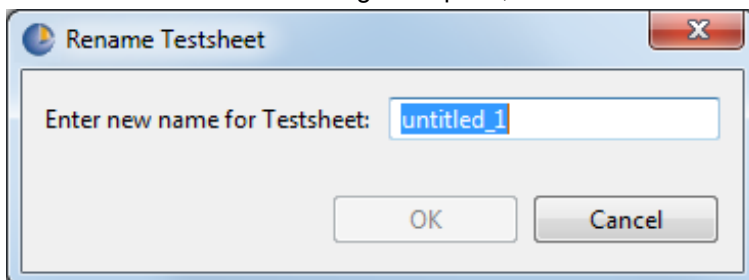


## How to rename testsheets

When you add a new Testsheet, it is assigned a default name of `untitled_n`, where `n` is a sequential number. You can change each Testsheet name to a preferred name when its Ruletest is open in its editor in these ways:

- Open the Testsheet's tab, and then choose the menu action **Ruletest > Testsheet > Rename Testsheet**
- Open the Testsheet's tab, and then click the **Rename Testsheet** button on the toolbar
- Double-click on a Testsheet's tab

The **Rename Testsheet** dialog box opens, as shown:



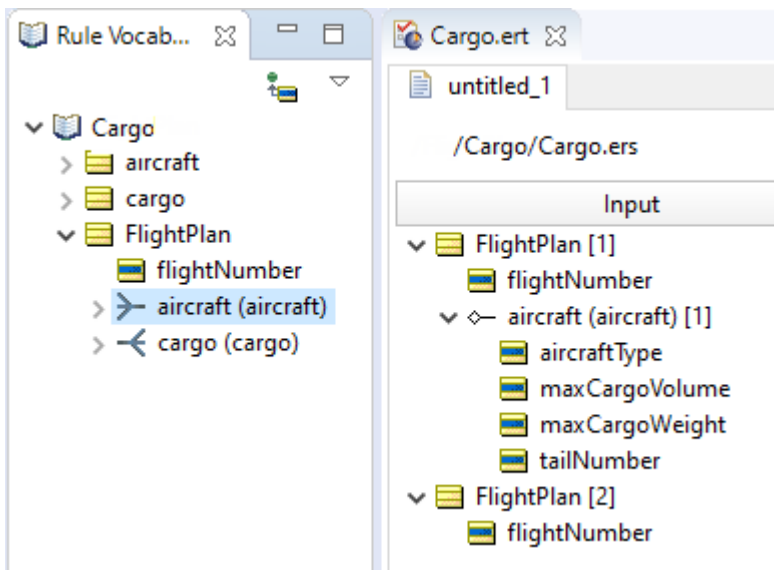
Enter the unique name you want to assign within this Ruletest.

**Note:** Ruletest and Testsheet names must comply with the guidelines described in [File naming restrictions](#) on page 16.

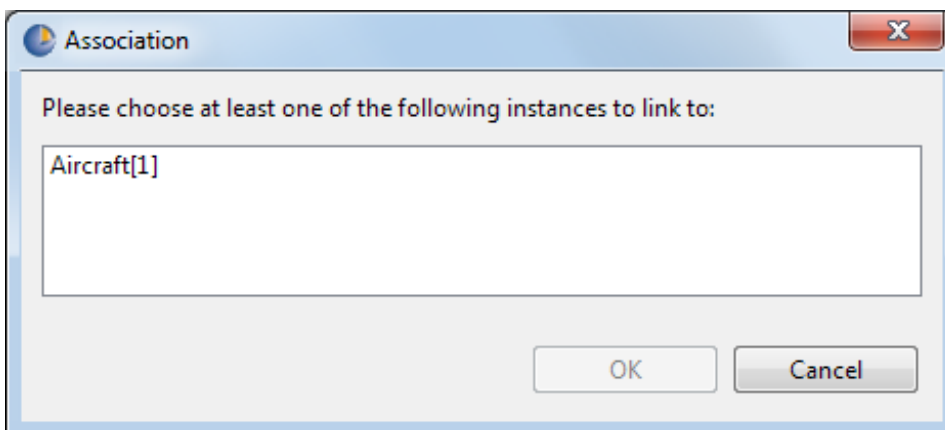
## How to associate one child entity with more than one parent

To create associations between a child entity and more than one parent:

1. First, ensure the parent-child (source-target) association supports a multiplicity of many-to-many or many-to-one.
2. Drag and drop the parent entities (here, `FlightPlan`) as usual.
3. Create an association between aircraft and `FlightPlan[1]` as described in **Creating Associations**.
4. To associate `aircraft[1]` to `FlightPlan[2]` in addition to `FlightPlan[1]`, drag aircraft as shown to the right, and press the **CTRL** key as you drop it.

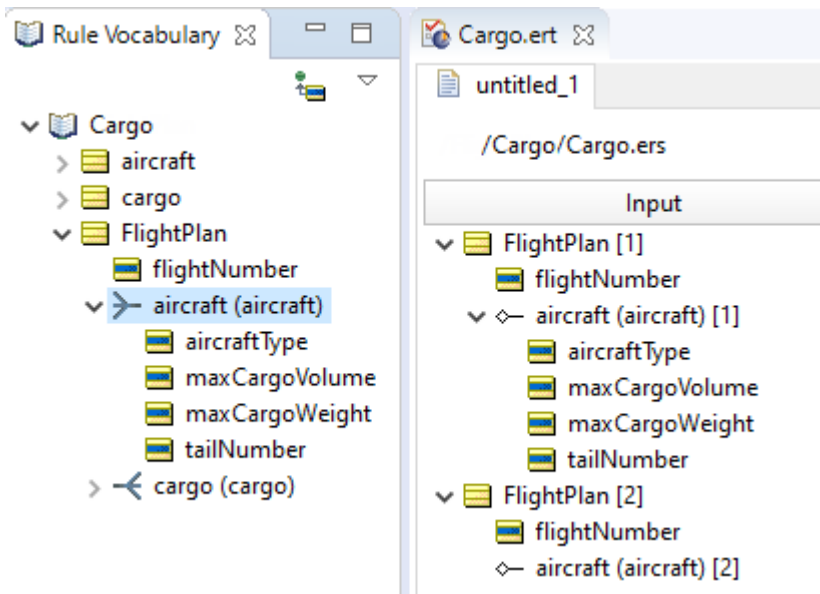


5. A pop-up window will ask you to select the Aircraft you are linking to. In this case, select `Aircraft[1]` and click **OK**.



6. Verify the child entity has the appropriate "indented" structure underneath both parent entities, indicating the two associations have been created correctly.

7. Notice that data for `aircraft[1]` is only entered once, under the `FlightPlan[1]` entity, even though it is associated with both `FlightPlans`.



8. In large Testsheets, it may be difficult to locate the original instance of `aircraft[1]`. Clicking on any copy and choosing **Ruletest > Go To Entity** from the menubar will automatically locate the original instance.

## How to save a Ruletest

You can save a new Ruletest as soon as you enter some data into it. To save the Ruletest with a different name, choose the menu command **File > Save As**.

## How to import a JSON document to a testsheet

You can import a well-formed JSON-formatted document into the Tester by either:

- Choosing the **Ruletest** menu command **Testsheet > Import > JSON from File**
- Loading the file on to the clipboard, and then right-clicking in the Input column to choose **Import JSON from Clipboard**.

You need to provide an appropriate name for the Decision Service. It is not an issue in the Studio Tester, but it is very important when you want to use the file as an input document in deployment where you should be using deployment name (not the Ruletest or the Project name).

### Native JSON

Native JSON can be imported through the **Import JSON from Clipboard** option. However, you cannot export native JSON from a Testsheet.

---

**Note:** The Web Console's Test Execution on a deployed Decision Service, when given native JSON input, produces native JSON output. See *"Test Execution" in the Web Console Guide*.

---

---

## How to import an XML or SOAP document to a testsheet

You can import XML or SOAP data into the Tester rather than recreate it by using the **Ruletest** menu command **Testsheet > Import > XML/SOAP**.

Corticon Studio can provide a sample XML or SOAP document from a populated testsheet that you can use as a template. Choose the menu command **Testsheet > Data > Input > Export Request XML** or **Testsheet > Data > Input > Export Request SOAP**.

## How to export a testsheet

Exporting Testsheets into documents lets you easily create templates and payloads.

### Export a testsheet to a JSON document

You can export a testsheet into well-formed JSON documents. Exporting Testsheets into JSON documents is quite useful:

- As a template for structuring much larger data sets for subsequent JSON Import (as described above)
- As a JSON payload to test a deployed Decision Service on the Server

---

**Note:** You can choose to exclude transients when you export Testsheets to JSON using the Exclude Transients option. For example, select **Ruletest > Testsheets > Data > Input > Exclude Transients** to set your preference to exclude transients. Clear the option to include transients in the exported document.

---

### Input

To generate the Input column of a testsheet to JSON, either:

- Choose the menu command **Testsheet > Data > Input > Export Request JSON**
- Right-click in the **Input** column, and then choose from:
  - **Export JSON to file...**
  - **Export JSON to Clipboard**

The output from a simple `Cargo` test is as shown:

```

{
  "_metadataRoot": {},
  "Objects": [
    {
      "volume": 10,
      "container": null,
      "weight": 1000,
      "_metadata": {
        "#type": "Cargo",
        "#id": "Cargo_id_1"
      }
    },
    {
      "volume": 10,
      "container": null,
      "needsRefrigeration": true,
      "weight": 2000,
      "_metadata": {
        "#type": "Cargo",
        "#id": "Cargo_id_4"
      }
    }
  ],
  "name": "InsertDecisionServiceName"
}

```

It is good idea to change the name value to an appropriate name for the deployed Decision Service it will be calling; in this case, Cargo.

---

**Note:** You cannot export a testsheet as native JSON.

---

## Output

To generate the Output panel of a testsheet to well-formed JSON either:

- Choose the menu command **Testsheet > Data > Output > Export Request JSON**
- Right-click in the **Output** column, and then choose from:
  - **Export JSON to file...**
  - **Export JSON to Clipboard**

You cannot import into the **Output** column.

## Expected

To generate the Expected panel of a testsheet to well-formed JSON either:

- Choose the menu command **Testsheet > Data > Expected > Export Request JSON**
- Right-click in the **Expected** column, and then choose from:
  - **Export JSON to file...**
  - **Export JSON to Clipboard**

## Export a testsheet to an XML document

Exporting Testsheets into XML documents can be useful for a few reasons:

- For use as a template for structuring much larger data sets for subsequent XML Import (as described above).
- To generate an XML data payload to test a deployed Rulesheet (a Decision Service on a Server).

### Input

To generate the Input column of a testsheet to well-formed XML, choose the menu command **Testsheet > Data > Input > Export Request XML**.

The sample XML file shown below is a direct export of the Input Testsheet created in [Populating the Input Testsheet](#) section. Notice the hierarchical structure.

**Note:** You can choose to exclude transients when you export Testsheets to XML using the Exclude Transients option. For example, select **Ruletest > Testsheets > Data > Input > Exclude Transients** to set your preference to exclude transients. Clear the option to include transients in the exported document.

You must replace the `decisionServiceName` parameter, shown in line 2, with the Decision Service this request will call.

```

1  <?xml version="1.0" encoding="UTF-8"?>
2  <CorticonRequest xmlns="urn:Corticon"
2  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
2  decisionServiceName="InsertDecisionServiceName">
3  <WorkDocuments>
4  <Cargo id="Cargo_id_1">
5      <weight>1000</weight>
6      <volume>10</volume>
7      <container xsi:nil="true" />
8  </Cargo>
9  <Cargo id="Cargo_id_4">
10     <weight>1000</weight>
11     <volume>10</volume>
12     <container xsi:nil="true" />
13     <needsRefrigeration>true</needsRefrigeration>
14 </Cargo>
15 </WorkDocuments>
16 </CorticonRequest>

```

### Output

To generate the Output panel of a testsheet to well-formed XML, choose the menu command **Testsheet > Data > Output > Export Response XML**.

You cannot import into the Output column.

### Expected

To generate the Expected panel of a testsheet to well-formed XML, choose the menu command **Testsheet > Data > Expected > Export Response XML**.

## Export a testsheet to a SOAP message

To produce the request as an XML payload within SOAP-compliant envelope information, open a Ruletest in Studio, and then select **Ruletest > Testsheets > Data > Input > Export Request SOAP** to except that it encloses the XML payload within SOAP-compliant envelope information. The XML payload is identical to the XML generated by the **Export to XML** option.

**Note:** You can chose to exclude transients when you export Testsheets to SOAP using the Exclude Transients option. For example, set your preference to exclude transients. Clear the option to include transients in the exported document.

### Input

To generate the Input column of a testsheet to SOAP, choose the menu command **Testsheet > Data > Input > Export Request SOAP**. The output from a simple Cargo test is as shown:

```

1  <?xml version="1.0" encoding="UTF-8"?>
2  <SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/"
2  xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:xsd="http://www.w3.org/2001/XM
3  <SOAP-ENV:Body>
4  <CorticonRequest xmlns="urn:Corticon" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
4  decisionServiceName="InsertDecisionServiceName">
5  <WorkDocuments>
6  <Cargo id="Cargo_id_1">
7  <weight>1000</weight>
8  <volume>10</volume>
9  <container xsi:nil="true" />
10 </Cargo>
11 <Cargo id="Cargo_id_4">
12 <weight>1000</weight>
13 <volume>10</volume>
14 <container xsi:nil="true" />
15 <needsRefrigeration>true</needsRefrigeration>
16 </Cargo>
17 </WorkDocuments>
18 </CorticonRequest>
19 </SOAP-ENV:Body>
20 </SOAP-ENV:Envelope>

```

**Note:** On line 4, you must replace "InsertDecisionServiceName" with the name of the deployed Decision Service that this request will call.

### Output

To generate the Output panel of a testsheet to well-formed SOAP, either choose the menu command **Testsheet > Data > Output > Export Response SOAP**, or right-click in the **Output** column, and then choose **Export SOAP to file**.

You cannot import into the Output column.

## Expected

To generate the Expected panel of a testsheet to well-formed SOAP, choose the menu command **Testsheet > Data > Expected > Export Response SOAP**, or right-click in the **Expected** column, and then choose **Export SOAP to file**.

## How to create a Ruletest report

If the test subject of the Ruletest is a Ruleflow that has version identifiers set, the version is shown in the header of the report.

1. Select the menu command **Ruletest > Report**.
2. Choose the **Report Type**, **Report Style**, and **Output Folder** for this report.
3. Click **Finish**.
4. The Ruletest report opens as a new HTML page in your default web browser, and then saves the HTML, XML, and CSS files in the specified output folder.

The default CSS and XSLT files are samples that you can customize to suit your preferences.



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# How to document rule assets

---

As you design and develop rule assets, it is a good idea to document essential information about Vocabulary, Rulesheet, Ruleflow, and Ruletest files that you create, as well as the elements within them. For example, a comment can explain an asset's purpose and design, or annotate the use of an item within the asset. This information is particularly helpful to colleagues that maintain or enhance rule assets.

---

**Note:** Prior to the introduction of this feature, comments were added in Corticon Studio to an asset's **Properties** tab. When existing projects from earlier releases are opened in their editor, existing comments in the **Properties** tab are migrated to the **Comments** view.

---

For details, see the following topics:

- [About comments](#)
- [Add asset-level comments](#)
- [Add item-level comments](#)
- [Use the Comments view](#)

## About comments

Corticon lets you associate comments with most items in your rule assets. These comments provide helpful information about the assets to current and future stakeholders – a best practice.

### Levels of Comments

You can add two levels of comments, asset-level and item-level. Asset-level comments are associated with an asset itself, while Item-level comments are more granular and associated with items such as Vocabulary entities, domains, attributes, and associations.

**Multiple Comments**

You can add more than one comment to an asset or individual item within an asset. Using multiple comments allows you to create a history or audit trail for the asset or item.

**Types of Comments**

Each comment is an action **To Do**, a **Change Log**, an informative **Note** (the default type of comment), or a comment that **Needs Review**.

**Rule asset specifics**

Each type of rule asset has specific commenting behavior, as follows:

| Asset        | Notes   |
|--------------|---|
| Vocabularies | <ul style="list-style-type: none"> <li>• Comments are added in the Vocabulary editor, not from the Project Explorer or Rule Vocabulary views.</li> <li>• Comments can be added at the root level for the file, but not for Custom Data Types or Datasource definitions.</li> </ul>  |
| Rulesheets   | <ul style="list-style-type: none"> <li>• Select a range of items (such as a1 : c2) to add and associate comments to them. If you later inject a new column within that range, the existing comments for that range are now associated to items in the added column too. And the Comments View is auto-updated to reflect the extended range (e.g., a1:c3).</li> <li>• When a column or row is removed from the Rulesheet, comments associated with its items are removed.</li> <li>• When a column or row is inserted into the Rulesheet, all comments are re-numbered accordingly.</li> <li>• When you expand columns, existing comments are associated with the expanded columns. However, you cannot add comments to an expanded column directly.</li> <li>• When you collapse or compress a column, associated comments are removed. Therefore, comments of compressed columns are removed.</li> <li>• You cannot add comments to Rule Statements.</li> </ul> |

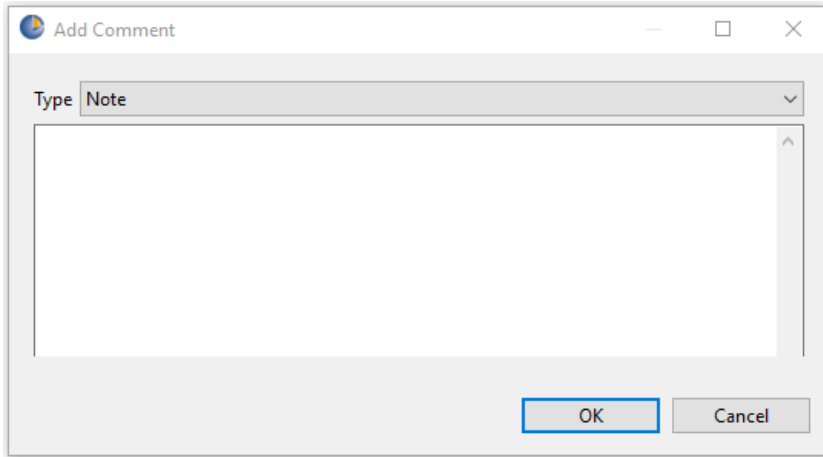
| Asset     | Notes   |
|-----------|---|
| Ruleflows | <ul style="list-style-type: none"><li>• To add a comment to a Ruleflow, select the item to comment, and then choose the menu command <b>Ruleflow &gt; Add Comments</b>.</li><li>• You can add comments to most objects on the canvas: Rulesheet, Ruleflow, Service Call-out, Branch, and Subflow.</li><li>• When an item is a node is selected, the comment is added to it as an item-level comment. When no object is selected, the comment is added as a file-level comment.</li><li>• You can add several comments for an item or file.</li><li>• When multiple objects are selected on the canvas, no comments are allowed.</li><li>• Unlike other assets, the Ruleflow toolbar provides no <b>Comments</b> button.</li></ul> |
| Ruletests | <ul style="list-style-type: none"><li>• You can add comments in the Input column to all entities, attributes, and associations.</li><li>• Only one comment is allowed for each item.</li><li>• Only one item can be selected to apply comment.</li><li>• Comments can be added for each Testsheet, but not to the Ruletest file.</li></ul>  |

## Add asset-level comments

To add comments to a rule asset file:

1. In Corticon Studio, open the file in its editor.

2. On the toolbar, click the **Comments** button . The **Add Comment** dialog opens:



3. On the drop-down menu, select the type of comment you want: **To Do**, **Change Log**, **Note**, or **Needs Review**.

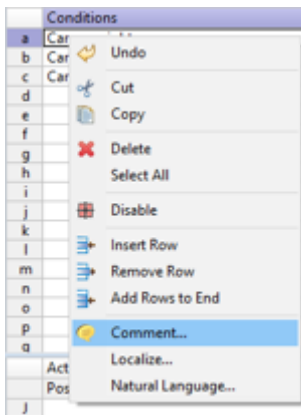
4. Enter a comment in the field provided.

5. Click **OK**. The comment is captured and displayed in the Comments View.

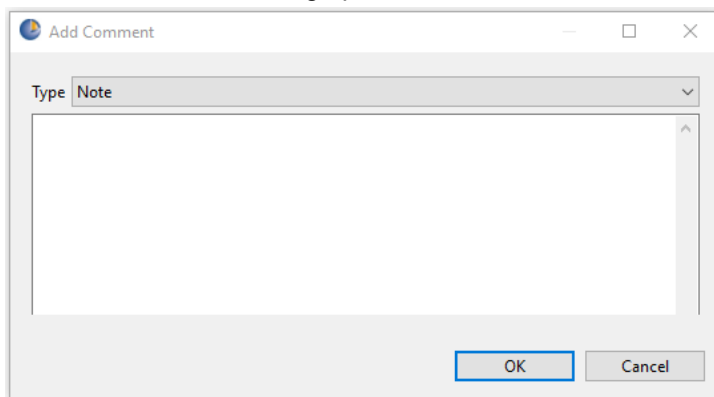
## Add item-level comments

To add comments to items in a rule asset:

1. In Corticon Studio, open the asset file.
2. Right-click on the item or range of items you want to comment, and then select **Comments ...** on the context menu, as shown in a Rulesheet:



3. The **Add Comment** dialog opens:



4. Click the **Type** field's dropdown button, and then choose the type of comment you want to enter: **To Do**, **Change Log**, **Note**, or **Needs Review**.
5. Enter a description or annotation in the field provided.
6. Click **OK**. The comment is captured and displayed in the Comments View.

---

**Note:** Ruletest Testsheets support just one comment per item. Other assets support multiple comments per item.

---

## Use the Comments view

The **Comments** view lists all comments associated with a rule asset and its elements. If the view is not currently showing, select the menu command **Window > Show View > Comments**.

The **Comments** view opens as a tab in the asset's workspace, as illustrated:

| DateTime            | User     | Type      | Category       | Item    | Text                                     |
|---------------------|----------|-----------|----------------|---------|--|
| 10/06/17 9:53:59 AM | cmcguire | TODO      | Ers            |         | Print out Rule Canonical Model           |
| 10/06/17 9:52:57 AM | cmcguire | Note      | Condition Cell | {a1:b3} | Adding a comment to the range a:1 to b:3 |
| 10/06/17 9:51:12 AM | cmcguire | ChangeLog | Action         | {A}     | Reflects latest                          |

where:

- **DateTime:** Displays the date and time when the comment was added or last edited. Read-only.
- **User:** Displays the name of the person that created the comment or last edited it. Read-only.
- **Type:** Identifies the type of comment entered: **Note**, **TODO**, **Change Log**, or **Needs Review**. The type can be changed.
- **Category:** Displays the class of element that was commented. Read-only.
- **Item:** Identifies the location of the item commented. Read-only.
- **Text:** Contains the body of the comment. The text can be edited as appropriate.

## Editing a comment

To manage an existing comment:

- **Edit:** Double-click on a row in the Comments view to open that comment in the **Edit Comment** dialog where you can change the Type or Text of the comment.
- **Undo|Redo:** On the menu, select **Edit > Undo** and **Edit > Redo** to modify your changes.
- **Delete:** Select one or more comments in the Comments view, then right-click and choose **Delete**.

## Managing the listed comments

The **Comments** view lets you sort, filter, and search the comments list.

- **Filter** : Turn auto filtering on to limit the displayed comments to just those defined for the item selected in the active asset editor. When auto filtering is off, all comments defined in the asset are displayed.
- **Sort:** Click a column header in Comments view to sort displayed comments by that field in ascending or descending order.
- **Search:** Enter search text in the **Search** field of the Comments view to display only comments containing that text in the text area.
- **Navigation:** Click on a comment in the Comments view to highlight in orange the **Item** range of the comment.

---

## How to localize Corticon Studio

---

Localizing your rule modeling and processing environment involves three related functions:

- Displaying the Studio **program** in your locale of choice. This means switching the Corticon Studio user interface (menus, operators, system messages, etc.) to a new language. Consult with Progress Corticon support or your Progress representative to learn more about available and upcoming Corticon localization packages.
- Displaying your Studio **assets** in your locale of choice. This means switching your Vocabularies, Rulesheets, Ruleflows, and Ruletests to a new language. See *"Set Studio to run in another language" in the Corticon Installation Guide*.
- Requests submitted to a Corticon Server can specify an execution property that indicates the **locale of the incoming payload** so that the server can transform the payload's decimal and date values to the decimal delimiter and month literal names of the server, run the rules, and return the output formatted to the submitter's preference. See *"How to handle requests and replies across locales" in the Deployment Guide*.

For details, see the following topics:

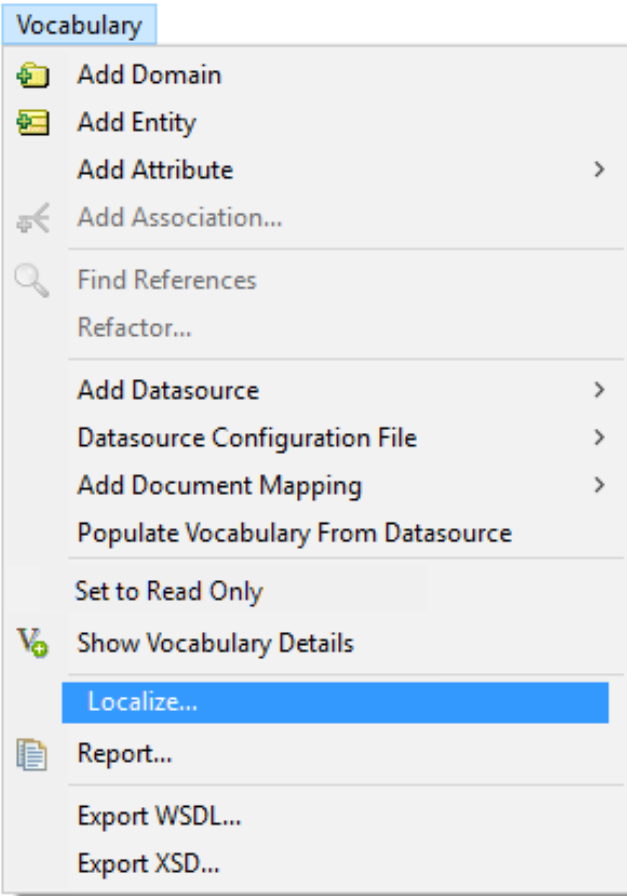
- [How to localize the Vocabulary](#)
- [How to localize a Rulesheet](#)

## How to localize the Vocabulary

A Vocabulary can be localized into several different languages. If a Vocabulary includes multiple locale information, then Corticon Studio displays the locale corresponding to the operating system's current locale.

To localize a Vocabulary, select **Vocabulary>Localize...** from Corticon Studio's menubar as shown below:

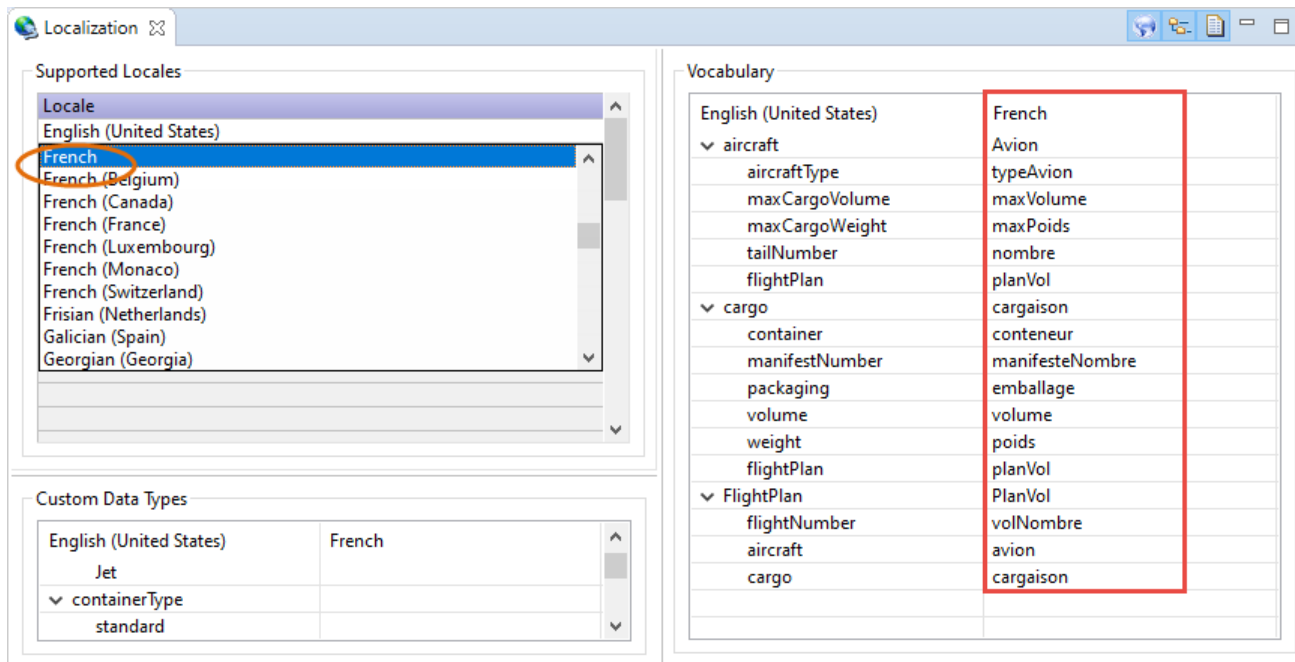
**Figure 6: Localize a Vocabulary**



Corticon Studio displays the Vocabulary Localization window as shown below.

Notice that we've selected French in the second line of the **Supported Locales** pane, circled below in orange. This choice causes a second column to appear to the right in the **Vocabulary** pane (shown below in an orange rectangle).

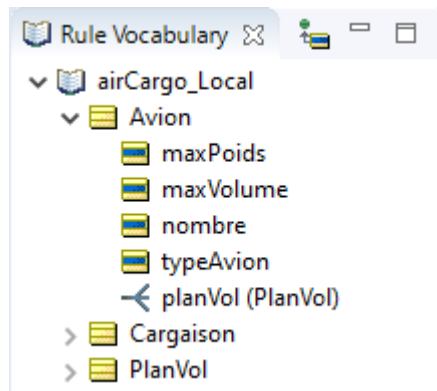
**Figure 7: Selecting and populating a second locale**



In the **French** column, we must manually add French translations for each Vocabulary term, including association role names. These translated terms must be unique from the English or other base version shown in the left-hand column.

With a localized Vocabulary, now switch your operating system to French locale. Different OS's have different methods for switching locales - consult your OS help or documentation for assistance.

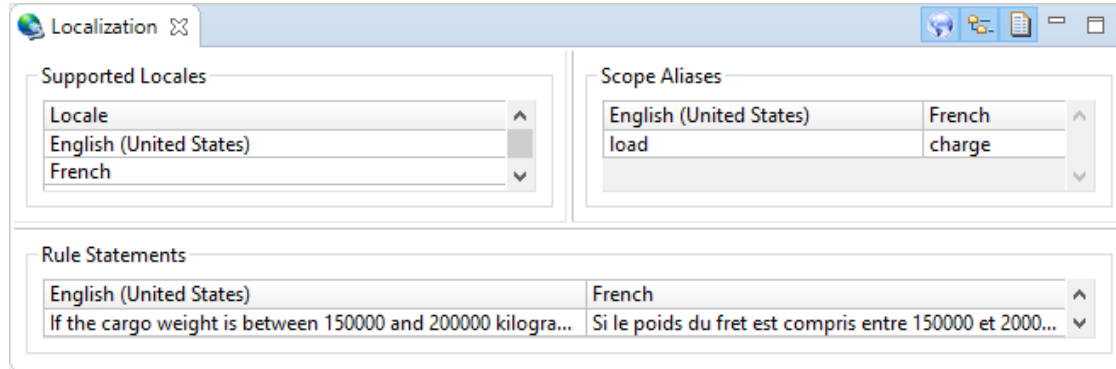
**Figure 8: A Vocabulary displaying its French translation**



# How to localize a Rulesheet

When you create a new Rulesheet or Ruletest using a localized Vocabulary, those assets will be localized too. The **Rulesheet > Localize...** menu selection allows you to further localize the Rulesheet by translating Scope aliases and Rule Statements, as shown:

**Figure 9: A Rulesheet displaying its French translation**



## **The Corticon Studio reporting framework**

---

Corticon Studio lets you create reports on each of the assets in a project: Vocabulary, Rulesheets, Ruleflows, and Ruletests.

You generate reports from a dialog box that lets you choose from standard types and styles of reports, and then set the output folder.

The standard reports provide summaries at different levels of detail for the different asset types.

For example:

**Progress Corticon**

**REPORT TYPE**  
Basic Rulesheet Natural Language

**PROJECT NAME**  
Tutorial

**REPORT DATE**  
2016-09-14

**ASSET FILE NAME**  
.../Tutorial/Cargo.ers

**COMMENTS**  
The basic rules for determining the appropriate container for a package.

► **SCOPE**

▼ **FILTERS**  
Reject any package that exceeds the assigned aircraft weight capacity

**RULES**

| # | Conditions (incl. Values)   | Actions (incl. Values)                                   | Rule Statements   | Alias | Overrides |
|---|---|--|---|-------|-----------|
| 1 | What is the weight (in kilograms) of the package? <= 20000  | Then use this type of container...<br><b>standard</b>    | INFO: Cargo weighing <= 20,000 kilos must be packaged in a standard container.                                    | Cargo |           |
| 2 | What is the volume (LxWxH in cubic meters) of the package? > 30   | Then use this type of container...<br><b>oversize</b>    | INFO: Cargo with volume > 30 cubic meters must be packaged in an oversize container.                              | Cargo | 1         |
| 3 | What is the weight (in kilograms) of the package? > 20000<br>What is the volume (LxWxH in cubic meters) of the package? <= 30 | Then use this type of container...<br><b>heavyweight</b> | INFO: Cargo weighing > 20,000 kilos, with volume <= 30 cubic meters, must be packaged in a heavyweight container. | Cargo |           |

The standard report types are:

**Report Type** one of the XSLT files for the asset type:

- **Vocabulary**
  - Basic Vocabulary
  - Detailed Vocabulary
  - Complexity Report
- **Rulesheets**
  - Basic Rulesheet Expressions
  - Basic Rulesheet Natural Language
  - Detailed Rulesheet Expressions
  - Detailed Rulesheet Natural Language
- **Ruleflows**
  - Basic Ruleflow Expressions
  - Basic Ruleflow Natural Language
  - Detailed Ruleflow Expressions
  - Detailed Ruleflow Natural Language
  - Complexity Report

- 
- **Ruletests**
    - Basic Ruletest

The type files are located at `[CORTICON_STUDIO_WORK_DIR]\Studio\Reports\XSLT\` in folders according to the asset types. You can copy the files to use as templates or change them to create report types that are then offered in the **Report Type** dropdown menu for the asset type.

**Report Style** is the CSS stylesheet to use for the report. The basic stylesheets are:

- Corticon Blue
- Corticon Green

The style files are located at `[CORTICON_STUDIO_WORK_DIR]\Reports\CSS\`. You can copy a stylesheet file to use as a template to create custom report styles that are then offered in the **Report Style** dropdown menu.

**Output Folder** is the location where the report will be stored on disk. The default location is `[CORTICON_STUDIO_WORK_DIR]/Reports`. You can create a root location such as `C:\CorticonStudioReports` and then append subfolder names to sort out your projects, tasks, clients, or versions.

When you have set the parameters of the report, and then click **Finish** the processing takes place as follows:

1. Generates an XML file using its built-in XML template
2. Uses the selected XSLT transformation to move the XML into HTML
3. Applies the selected CSS to render the HTML file in a web browser page
4. Copies the XML, HTML, and CSS files to the specified output folder.

## Customizing the XSLT stylesheet transforms

Corticon Studio's initial XSLT stylesheets can be modified or copied to create preferred XSLT files to generate custom Studio reports. Name and save your modified XSLT file in the appropriate XSLT subfolder so that it will be listed and callable when you run reports.

## Customizing the CSS stylesheets

Corticon Studio's initial CSS stylesheet can be modified or copied to create a preferred CSS files to render standard and custom Studio reports. You can then produce the HTML reports as PDF, Word and other output formats. Name and save your file in the CSS folder so that it will be listed and callable when you run reports.

See also:

- [How to create a Vocabulary report](#) on page 67
- [How to create a Rulesheet report](#) on page 100
- [How to create a Ruleflow report](#) on page 111
- [How to create a Ruletest report](#) on page 159



## How to exit Corticon Studio

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When you close the Corticon Studio (select **File > Exit** from the menu), you are prompted to save all open Vocabulary, Rulesheet, Ruleflow, and Ruletest files.

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**Important:** If you choose to exit without first saving your files, any changes you made since opening them will be lost.

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