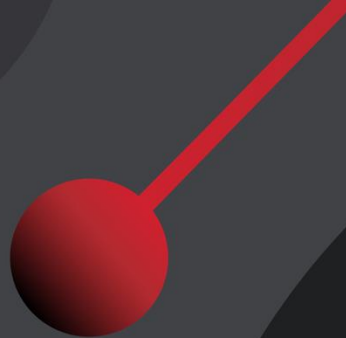




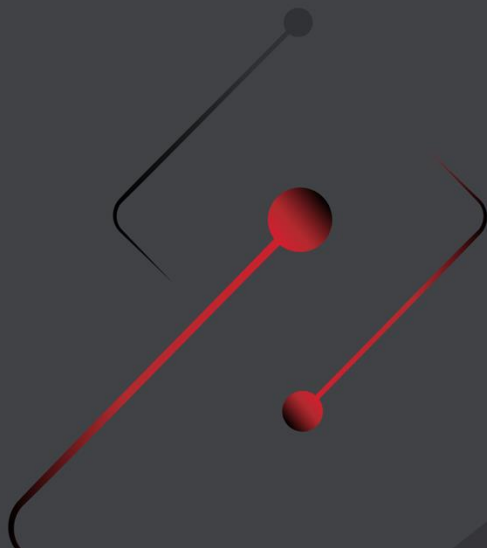
A

26



2026

ACCELERATE



 RED OAK PRESENTS

The background features several abstract geometric elements: a white circle in the top-left corner containing a red sphere and black lines; a large red circle in the top-right corner; a black circle in the top-center; a large black arc at the bottom; and various smaller red and black circles and lines scattered throughout.

Writing Rules | Advanced

Move beyond the basics of writing rules
and learn advanced strategies

ACCELERATE 2026

Aaron Berger

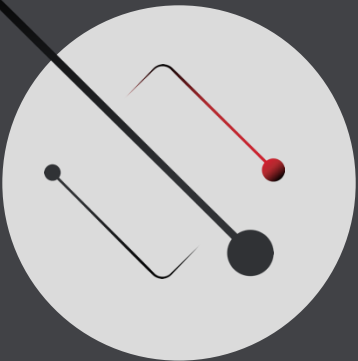
Director of
Implementations



Rob Canfield

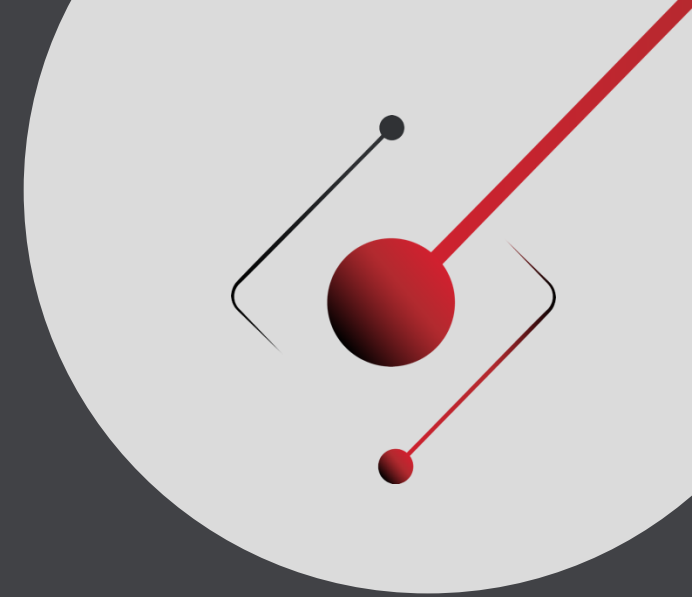
Director of
Client Support





Today's Agenda

- 1 Quick Level Set
- 2 Working with Data
- 3 Advanced Rule Types
- 4 Date Comparison & Lab
- 5 Loops & Lab



Quick Level Set

What are rules?

Enable advanced workflow scenarios

Written in JavaScript 5 format

References submission data structure

Found under Administration > Rules sub-tab

Helper Functions

The screenshot shows the Red Oak Administration interface. At the top, there is a navigation bar with the 'USER CONFERENCE' logo, the site name 'Red Oak', and user information 'Tommy Rules | Logout'. Below this is a secondary navigation bar with links for 'Submissions', 'Search', 'Reports', 'Administration' (highlighted), 'Library', and 'My Profile'. A search box is also present. A red banner indicates the current version: 'v2026.0328.1 - Release Notes (18 new)'. The main content area is titled 'Administration Site Configuration' and includes a 'View Audit Log' button. A sub-navigation bar shows 'General Site Settings', 'System Announcements' (selected), 'Help Links', and 'OAuth2 API Credentials'. Below this, there is an 'Add New' button and a message 'No records returned.' with navigation arrows. A table with columns 'Name', 'Type', 'Date/Time', 'Active?', and 'Action' is shown, also containing the message 'No records returned.'. At the bottom, a status bar indicates 'Presentation last saved: Just now' and a copyright notice 'Copyright © 2026 Red Oak Compliance'.

USER CONFERENCE Red Oak Tommy Rules | Logout
Conference Demo | US/Central GMT-0500 | - English

Submissions Search Reports Administration Library My Profile Search

Scratchpad v2026.0328.1 - Release Notes (18 new)

Site Configuration Users Groups Questions Fieldsets Submission Types Companies Visibility Profiles Lexicons Comment Templates Rules

Administration Site Configuration View Audit Log

General Site Settings System Announcements Help Links OAuth2 API Credentials

Add New

<< Prev Next >> No records returned.

Name	Type	Date/Time	Active?	Action
No records returned.				

No records returned. << Prev Next >>

Presentation last saved: Just now

Copyright © 2026 Red Oak Compliance

Rule Types

Activity Or Transition
Warning

Email Alert

Activity Or Transition
Error

Expiration Date

Activity Assignment

Need By Date

Activity Group
Assignment

Expiration Date Validation

Activity Verification Type
Assignment

Transition Display

Checkpoint

Form Display

Cloning Validation

Activity Verification Type Assignment

WHAT IT DOES

Controls which verification types can be assigned

Runs when a verifier assignment is attempted

Returns the allowed verification type name

BUSINESS VALUE

Ensure only qualified reviewers verify sensitive content

Automatically enforce review policies — no manual gatekeeping

Works alongside your workflow without extra configuration

Cloning Validation

WHAT IT DOES

Validates whether a submission can be cloned from a parent

Returns true to block cloning; false to allow it

Can access parent submission data

BUSINESS VALUE

Prevent cloning of expired or non-compliant pieces

Enforce rules like “only approved templates can be cloned”

Maintain compliance even when reusing content

Expiration Date Validation

WHAT IT DOES

Runs when an admin manually changes an expiration date

Returns true to block the change; false to allow it

Checks the proposed new expiration value

BUSINESS VALUE

Prevent accidental 10-year expirations on 90-day pieces

Enforce expiration policies even on manual overrides

Works alongside the standard Expiration Date rule

Why Automate Compliance Checks?



Prevent Problems at the Source

Catch issues before a reviewer ever sees them



Speed Up Review Cycles

Cleaner submissions mean faster approvals



Enforce Consistency Automatically

Same rules apply every time, regardless of who submits



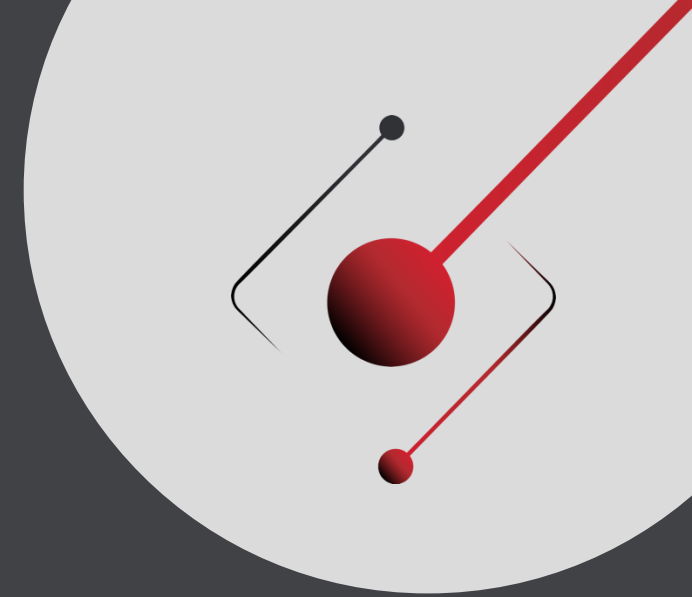
Check Every Document, Every Time

Nothing slips through — whether it's 1 file or 50



Scale Without Adding Headcount

Automation absorbs volume so reviewers focus on real risk



Date Comparison

Why Date Rules Matter



Eliminate Manual Checks

Date rules catch mismatches automatically before review



Speed Up Review Cycles

Less back and forth, and more time focusing on the actual content



Enforce SLA Consistency

Ensure every submission meets timing requirements



Reduce Regulatory Exposure

Prevent non-compliant materials from reaching clients



Maintain a Clean Audit Trail

Every date validation is logged and traceable

Real-World Date Comparison Rules

Past Date on Submission

“Compliance approved a submission with a Date of First Use in the past.”

→ A date rule blocks approval when a form date field references a date that has already passed.

Need By Date Misaligned with SLAs

“Marketing is entering a Need By Date that does not match SLAs set by Compliance.”

→ A date rule enforces minimum gaps between dates automatically, eliminating manual SLA oversight.

Clone with Unexpired Parent

“A clone submission was approved while its parent submission had not yet expired.”

→ A date rule flags clone submissions where the parent’s expiration date has not yet been reached.

Types of Date Checks You Can Build



Past Check

Is this date already expired? Block the submission.



Future Check

Is this date not yet valid? Prevent premature approval.



Gap Check

Is there enough time between two dates? Enforce minimum waiting periods.



Proximity Check

Is this date within X days of another date field? Warn before it becomes a problem.



Range Check

Does this date fall within an allowed window? Restrict submissions to valid periods.

Common Gotchas



Dates Come Back in UTC

Rules that compare dates must account for timezone differences to prevent off-by-one errors.



Cross-Timezone Rules Need an Offset

If users span time zones, build a conversion into the rule's JavaScript to avoid mismatches.



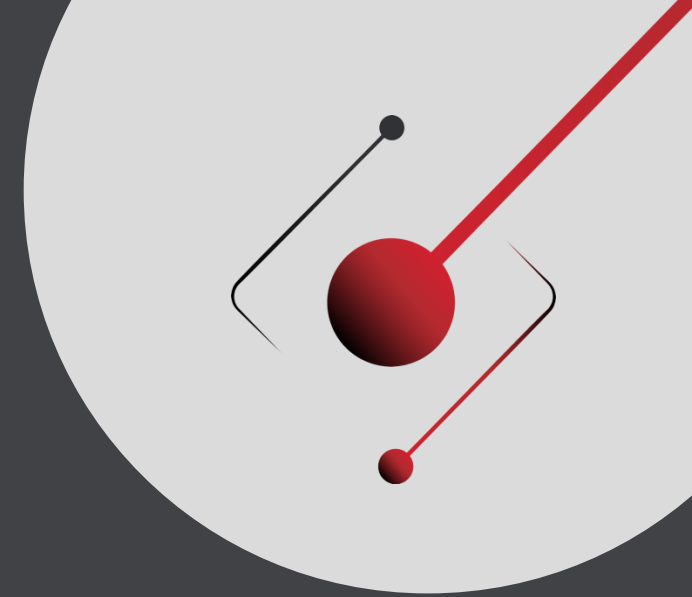
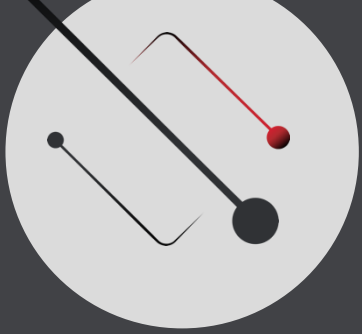
Rules Run on Every Trigger

A rule fires every time its trigger event occurs, not just once. Make sure your logic is consistent and repeatable.



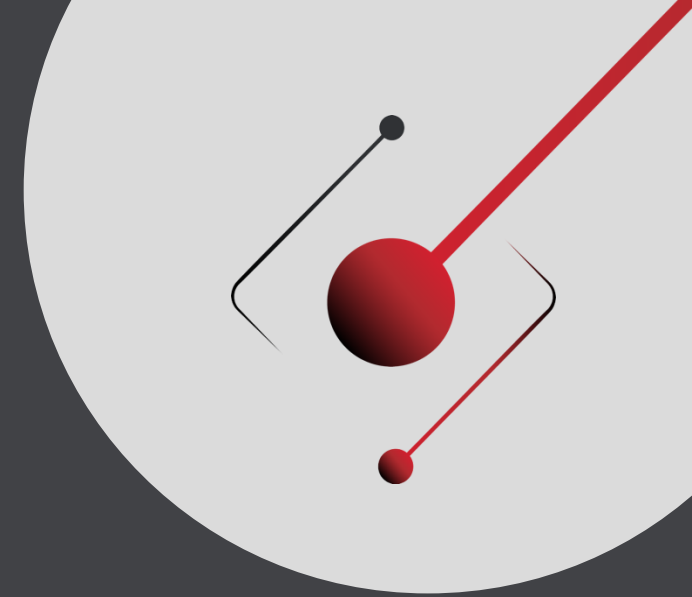
Always Check `submission.parent` First

Not all submissions are clones. If there's no parent and your rule reads `submission.parent.expirationDate`, it will throw an error.



Calculating Days Between Dates

Lab 1: “If ‘Need by Date’ is within 3 days, require “Rush” to be selected. If not, trigger an error”



Loops

Why Loops Matter



Handle Any Submission Size

Rules scale automatically, one document or fifty



Eliminate Manual Checks

Every document evaluated against the same rule, automatically



Reduce Regulatory Exposure

Loops close gaps from missed documents and unenforced fields

Real-World Scenarios

Require Updated Version Prior to Transition

“A submission was completed without the required updated version being uploaded.”

→ A loop checks every document — blocks the transition if a new version hasn't been uploaded during the current activity.

Checks Document Extension for Compatibility

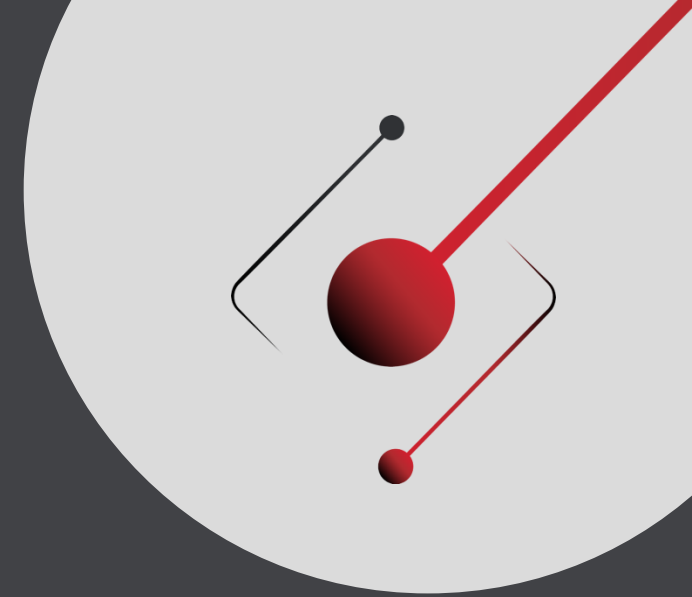
“A submission included a file with an unacceptable file extension.”

→ You define a list of valid extensions, and the loop ensures every document matches that list.

Require External Approval Letter as Supporting Material

“A submission requiring sign-off from an outside group was advanced without the approval letter attached.”

→ A loop checks for a document of the required type — if the approval letter is missing, the submission is blocked until the submitter uploads it.



Final Version Required

Lab 2: “Require an updated version is uploaded before the submission can be completed”

Questions

ACCELERATE 2026

We're here to help!
Support@Redoak.com

ACCELERATE 2026



Thank You

ACCELERATE 2026