Auto-Validation

There are three methods of auto validation available in RippleDown.

- By Report – most restrictive
- By Report Section
- By Rules – most flexible

Managing auto-validation using reports

The most conservative approach for managing auto-validation is to set an auto-validation level for each particular report that can be given by the project. Each report is considered to be any different combination of comments composed by the rule set.

To set auto-validation levels on a report-by-report basis:

1. Use the menu Auto-validation | Report Settings to show a table of all reports that have been recently given by the project, that is, given within the last month.
2. Review each report in the table. Reports that already have some level of auto-validation set will have a tick in the Allowed column, and possibly a percentage in the Level column.
3. The Rejected column shows how many times the corresponding report was corrected during validation, that is, was inappropriately given by the project. Reports that are never, or rarely, rejected are possible candidates for auto-validation.
4. If you decide to set a non-zero auto-validation level for a report, click the Edit button and set the desired auto-validation level for that report. The Allow auto-validation check box will be checked automatically if you set a non-zero auto-validation level.

Changes made to auto-validation settings are effective immediately.

Managing auto-validation using report sections

A less conservative approach for managing auto-validation than using reports is to set an auto-validation level for each particular report section that can be given by the project. This approach is most appropriate for projects where the report sections are independent of one another, that is, the comments in one report section are given independently to comments in another report section.

Setting an auto-validation level using report sections has the advantage that fewer levels need to be maintained as compared with setting auto-validation levels using reports.

To set auto-validation levels on a report section basis:

1. Set the auto-validation policy to use report sections using the menu Autovalidation | Policy and the associated policy window
2. Use the menu Autovalidation | Report Section settings to show a table of all sub-reports that have been recently given by the project, that is, given within the last month.
3. Review each sub-report in the table. Sub-reports that already have some level of auto-validation set will have a tick in the Allowed column, and possibly a percentage in the Level column.

4. The Rejected column shows how many times the corresponding sub-report was corrected during validation, that is, was inappropriately given by the project. Sub-reports that are never, or rarely, rejected are possible candidates for auto-validation.
5. If you decide to set a non-zero auto-validation level for a sub-report, click the Edit button and set the desired auto-validation level for that sub-report. The Allow auto-validation check box will be checked automatically if you set a non-zero auto-validation level.

Changes made to auto-validation settings will be effective immediately.

Managing auto-validation using rules

To use rules to manage auto-validation, you add an autovalidation setting to a case using the rule wizard, in exactly the same way as you would add a comment to a case.

1. Find a case (e.g. on the Archive case list or the Rejected case list) which is representative of the type of case that could safely be autovalidated at some level.
2. Start the rule wizard to add an "auto-validation setting", consisting of a percentage level and a textual description. You can select an existing setting, or create a new one.
3. Create or select an objective for this rule, and finally
4. Add conditions for the rule, check cornerstone cases, and finish the rule session.

To replace one auto-validation setting for a case with another using a rule, you select the current setting, then use the rule wizard to replace it with another one, in exactly the same way as you would replace a comment given for a case.

Finally, to remove the auto-validation setting for a case, you select the current setting and use the rule wizard to remove it.

You can see the list of all possible auto-validation settings using the menu from the main screen 'Autovalidation | Autovalidation rule settings...' This facility also allows you to edit the level of an auto-validation setting. The new level will apply to all cases with that auto-validation setting.

Notes:

1. Auto-validation settings using rules will take priority over any levels that have been set using reports or report sections.
2. In general, if an auto-validation setting is given for a case, it will not be auto-validated if the report for the case has yet to be enabled (or report section depending on the policy).
3. However, if you have checked the "Release" option in the auto-validation setting, then the auto-validation decision will be based only on the level you have set, not whether the report has been enabled.