HOW BUSINESS RULES ALLOW YOU TO USE COMPLEX LOGIC IN ASSIGNMENTPRO?

THE CHALLENGE

Global mobility processes are **complex with multiple factors** and nuances that need to be considered to ensure a successful mobility program. The factors impact many areas such as workflows, cost and compensation calculations or sharing employee benefits selections with assignees. AssignmentPro allows you to configure logic and have it **maintained by super-users.** Previously, the complexity might have required several hours from users to configure or update these logics. This required super-users to be equipped with technical skills, such as advanced knowledge on spreadsheets and often some level of database or HTML language skills.

THE SOLUTION

Equus introduced Business Rules which **simplify the configuration and maintenance of your logic** to process calculations, kick off checklists, audit expenses or automate and streamline other areas of AssignmentPro.

What are Business Rules?

Business Rules are the **next generation of rationale** offering a new intuitive way to create calculations and utilize logic in AssignmentPro. Anyone can configure, read, update, and maintain Business Rules in the system **without being a technical expert** or AssignmentPro super-user, by simply configuring rules using English terms.

Business Rules simplify multiple areas of AssignmentPro and can be used:

☑ to calculate Cost Estimate, Balance Sheet or What-If Cost Estimate items

☑ to validate expenses by integrating with existing Expense Audit Rules

☑ to enhance triggers for Quick Workflows, generating emails or notifications

☑ to enhance triggers for starting Checklists supporting business processes and to complete Checklist steps

☑ to calculate outputs for Election Set choices

☑ to calculate the cost of a desired Core Flex estimate for flexible calculations requested by the business (for the minimum, maximum, and recommended amounts in initial costings)

☑ to enhance trigger criteria for scheduled pulse checks & employee feedback surveys and to display these on the Mobile Employee Experience portal

Benefits of Business Rules

It is **easy to create and understand** Business Rules by simply selecting the fields within AssignmentPro and adding conditions that define expected outcomes in as many scenarios as needed.

Having a dedicated configuration screen, Business Rules are **easy to search and categorise** using labels. On the configuration, we display which area of AssignmentPro utilises the Business Rule and with the History tab you can track where any of the Rules have been used recently. When configured, Business rules can be **locked to strengthen security** and ensure only the relevant users can unlock and make changes to the configuration.
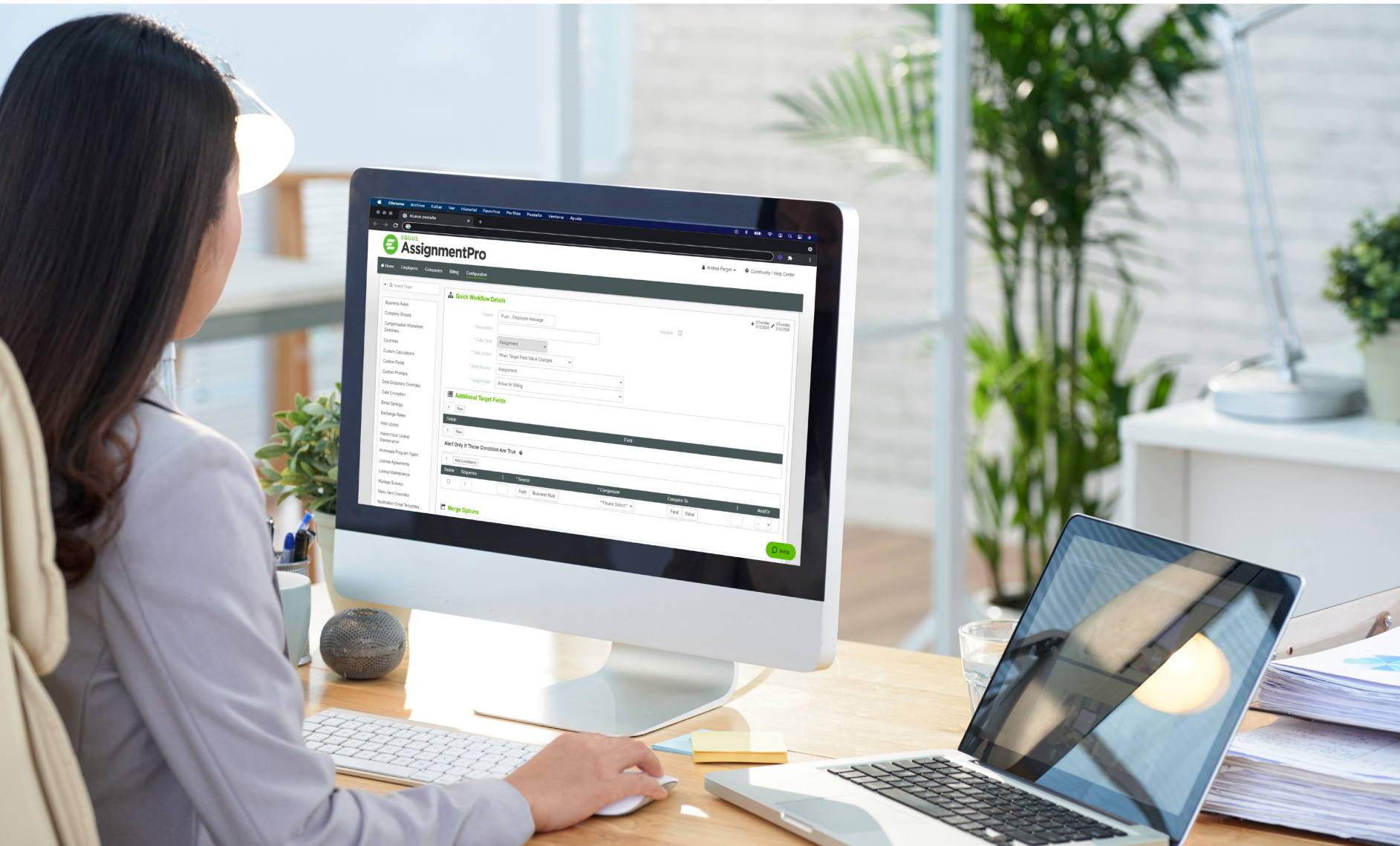
Once Business Rules and their components are created, they can be **used multiple times,** saving time and effort in creating large volumes of actions based on logic. Using the multi-context feature, one Business Rule can be used in What-If Cost Estimates, Core Flex calculations and Cost Estimates at the same time **dramatically reducing the work** required to create and maintain calculations.

For Cost Estimates and Compensation Calculations, there is no need to use spreadsheets with complicated formula or User Reports with complex SQL code, but simply add the logic written in English.

Business Rules also include a function that **simplifies data table lookups** and use of data. There is no need to use spreadsheets or User Reports to retrieve data from tables.

Testing and troubleshooting have been simplified, enabling you to run a Business Rule using real data without attaching it to any live items in the system, providing you with a view on the outcome of the configured logic.

Business Rules can be used in other areas of AssignmentPro, **allowing opportunity for automation.** One great example is within Quick Workflows, enabling the trigger of certain business processes based on complex conditions. Our partner, Unilever has utilised Business Rules in this area to automate a number of complex internal processes.
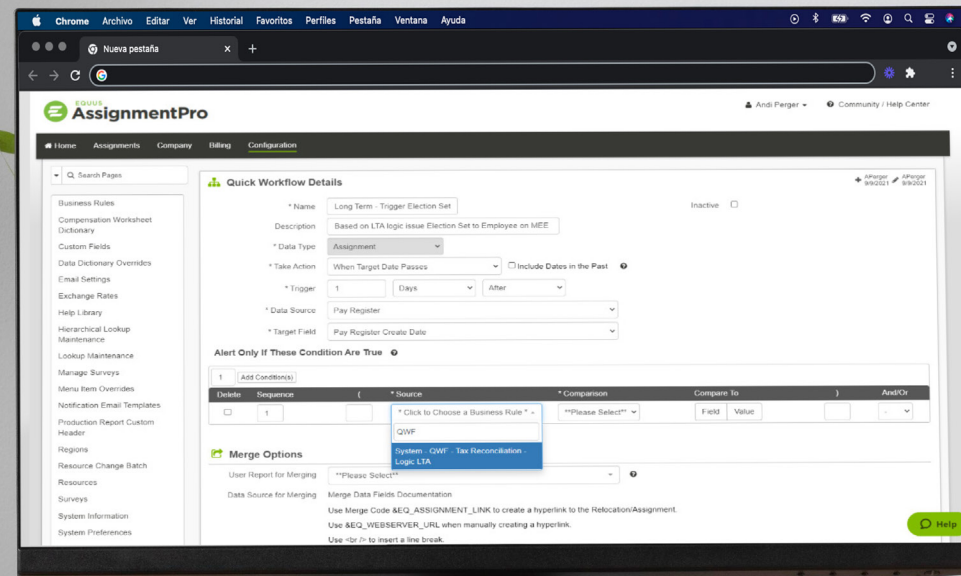
About Unilever

The Global mobility operations team lead and the Continuous improvement lead at Unilever shared their story. Unilever is one of the largest global consumer goods companies founded in the United Kingdom. Owning over 400+ brands that are household names and available in 190+ countries. Their products are used by more than 2.5 billion people every day around the globe.

How Business Rules support automation of Mobility processes?

The global mobility team at Unilever oversees 1,100+ assignments across 100+ countries and identified an opportunity to **streamline part of their tax reconciliation and payroll process** utilizing the new Business Rules feature.

The new process relies on Quick Workflows which include **complex conditions** based on factors such as assignment length, tax reconciliation, policy type, income levels and payroll dates in multiple locations. Combining all these factors was not possible using only field and value comparisons in the Quick Workflow conditions.

The previous process was fully manual, relying on emails between mobility, payroll, vendors and assignees. After each confirmation the team had to manually input the information to AssignmentPro and generate new payroll instructions. The process was evidently very time consuming, increased vulnerability to human error and highlighted several risks.

Introducing Business Rules has allowed more complex logic in Quick Workflow conditions which not only enabled Unilever to both **streamline and automate the process** from an internal perspective, but it's also **improved the user experience** for their employees. Unilever Employees have the option to select their repayment plan via the My Mobility portal (their instance of the Mobile Employee Experience) which not only gives a more interactive experience for the employee, but also drives usage of the employee portal. *Implementing this automated solution is estimated to provide the team a saving of 200 workhours in the first year, increasing as the scope of our program does year on year.* The automation created capacity for the team to focus on more value-add work, whilst ensuring that information flows correctly between all key stakeholders, **eliminating manual errors and saving time.**

CONCLUSION

Business Rules simplify mobility rationale used in many areas of mobility processes. Configuring new calculations is made easier and quicker with Business Rules, but more importantly **new opportunities for automation are made possible** using this new feature.

The introduction of Business Rules allows both new Business Rules logic and existing custom calculations to co-exist and be utilized in Cost Estimates, Compensation Calculation templates and Quick Workflows alongside several other areas of AssignmentPro. They are easy to configure, maintain and further enhance in the future.

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