

UI Policies and Business Rule

Problem 1: Cloud Dimensions stakeholders want fast reporting and quick response to priority 1 incidents

Problem 2: Cloud Dimensions users are not sure if incidents reports went through, upon submission

Solution 1: When a Priority 1 Incident creation is triggered, make a mandatory action to assign the Assignment Group field. ***This will add the incident to a group (example Hardware group) making it easier to see who has the work.***

Solution 2: After an Incident is submitted, a popup will display on the screen informing users that the form was successfully submitted.

Steps for Problem 1:

1. Create a UI Policy Condition to detect Priority-1 Incidents which were reported by employees.

All > Incident > Create new. Populate the UI Policy. Save the Policy Record to (save to stay)

UI Policy
Assignment group mandatory if Priority = 1-Critical

Table: Incident [incident] Application: Global Active: ☒

* Short description: Assignment group mandatory if Priority = 1-Critical

When to Apply

Conditions: Add Filter Condition Add "OR" Clause

Priority is 1 - Critical

2. Create a UI Policy Action that reacts to the condition that was set in step 1.

Stay in the same screen from step 1 (or search for the policy that was created by typing the name in the search bar). Scroll down to the tab Policy Actions. New > Populate the fields with Assignment Group and change Mandatory to True. > Submit to save and close

Steps for Problem 2:

1. All > Incidents > open any incident form > configure > business rules
2. New

3. Populate the business rules

Business Rule
Alert - Incident Submitted

UpdateDelete

A business rule is a server-side script that runs when a record is displayed, inserted, deleted, or when a table is queried. Use business rules to automatically change values in form fields when the specified conditions are met. [More Info](#)

NameAlert - Incident Submitted

ApplicationGlobal

TableIncident [incident]

Active☒

Advanced☐

When to run

Actions

Specify whether the business rule should run on **Insert** or **Update**. Use **Filter Conditions** to specify under which conditions the business rule should run.

Insert☒

Update☐

4. Click the Action tab > add message > after adding the message click submit

Business Rule
Alert - Incident Submitted

UpdateDelete

When to run

Actions

Specify field values using the **Set field values** choice lists:

- **To**: a value determined by the options available for that field.
- **Same as**: a value taken from another field.
- **To (dynamic)**: A value relative to the user configuring the business rule, or a user with a specific role.

Set field values

-- choose field --

To

-- value --

Add message☒

Message

— +

B *I* U ↶ ↷ Verdana 8pt

Your incident has been successfully submitted.

UI before implementing UI Policies and Business Rule

Incident
INC0000002

Update Resolve Delete

Manage Attachments (1): [rename][download]

NumberINC0000002

* Callerfred.luddy

CategoryNetwork

Subcategory-- None --

Service

Service offering

Configuration itemFileServerFloor2

Channel-- None --

StateOn Hold

* On hold reasonAwaiting Vendor

Impact1 - High

Urgency1 - High

Priority1 - Critical

Assignment groupNetwork

Assigned tohoward.johnson

* Short descriptionNetwork file shares access issue

UI After implementing UI Policies and Business Rule

The Assignment group is mandatory indicated by an asterisk * and there is a blue popup alerting users the incident was submitted. Improving the customer's UI experience and allowing for streamlined reporting.

now All Favorites History Incident - INC00...

Search

Incident
INC0009005

Update Resolve

NumberINC0009005

* CallerDavid.Miller

CategorySoftware

SubcategoryEmail

Service

Service offering

Configuration item

Channel-- None --

StateNew

Impact1 - High

Urgency1 - High

Priority1 - Critical

* Assignment group

Assigned to

* Short descriptionEmail server is down.

DescriptionUnable to send or receive emails.

now All Favorites History Workspaces Incidents

Search

Search

Actions on selected rows...

Your incident has been successfully submitted.

All > Active = true

	Number	Opened	Short description	Caller	Priority	State	Category	Assignment group
	Search	Search	Search	Search	Search	Search	Search	Search
	INC0010006	2022-07-26	test 2	fred.luddy	5 - Planning	New	Inquiry / Help	(empty)