Customization

UI Policies

- ➢ Runs on Client side
- ➢ Works in Form
- ➢ Set a field **Mandatory, Read only** and **Show/Hide**

UI Actions

- ➢ Runs on client side and server side
- ➢ Works in Form and List
- ➢ Set Form & List button, Form & List context menu and Form link

Business Rules

- ➢ Runs in server side
- ➢ It runs when a record is inserted, deleted, displayed or table is quired
- ➢ sys_Script
- ❖ When to run?
  - ▪ Before
  - ▪ After
  - ▪ Async
  - ▪ Display
- ❖ Operation
  - ▪ Insert
  - ▪ Query
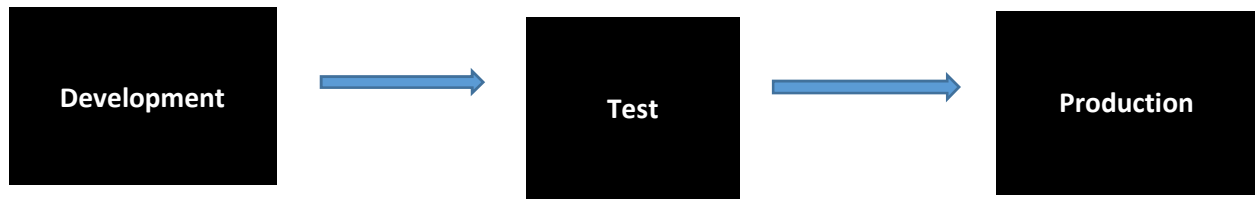 - ▪ Update
  - ▪ Delete

Client Script

- ➢ Runs in client side
- ➢ Generally works in form view, can be applied in the list view

Types of Client Script

- ▪ OnLoad() – It runs when the form is open and before user can enter any data
- ▪ OnSubmit() – It runs when a form is being submitted
- ▪ OnChange() – It runs when a field value changes in the form
- ▪ OnCellEdit() – It runs when you change a field value in list

Data Policy

- ➢ It is used to make the field mandatory and read only in the server end
- ➢ Runs on server side and can check the option to work in client end as well
- ➢ Data policy can be applied from external sources like import sets, web services etc. where as UI policy work only in main form of the table.

| Development | → | Test | → | Production |

- ➢ It is a group of configuraton changes (example: Business rules, UI policy etc) that can be moved from one instance to another
- ➢ Capture all the changes in a unit and then move it to another instance

Items can capture

- Busness Rules
- Client scripts
- UI Policy
- UI Actions
- Notifications

Items can not capture

- Records
- Users
- Groups
- CMDB Records
- System Properties etc

Planning process

- Same version of instance
- Proper update set selection
- Cloned environment
- Schedule a date and time
- Review and commit
- Review before moving