

# Control Out of State Shipping Catalog UI Policy

Lab 4.2

15-20 minutes

## Lab objective

You perform the following in this Lab:

- Review a Catalog UI Policy to see how to display specific location fields.

The Catalog UI policy should allow:

- Regular users who order a 'Brother Network-Ready Printer Cartridge' are only provided a list of California locations as delivery options.
- Users with the 'itil\_admin' role can choose a location outside of California, however they will receive a message reminding them that additional charges will be applied to the receiving location.

**Note:** As with Lab 4.1, most of the steps in this Lab have already been performed for you. Oh, sure, you'll need to write a few lines of script in this Lab, but the heavy lifting has already been done for you, so no whining.

Also, this Lab introduces Reference qualifiers, which are basically filters. Reference qualifiers are covered in more detail in a later module.

**Lab Dependency:** You must complete Lab 4.1, Control Variable Choices Catalog Client Script, before starting this exercise since it builds on the Catalog Item created in the previous lab.

## A. Create a Variable to Confirm a California Delivery

1. Navigate to **Service Catalog > Catalog Definitions > Maintain Items**.
2. Locate and open the **Brother Network-Ready Printer Toner** Catalog Item.

3. Verify the variables match the image below.

Type	Question	Order	Name	Active
Select Box	Which pack type would you like to order?	100	pack_type	true
Select Box	California delivery?	200	ca_location	false
Reference	Select a California location for delivery	300	location_ca	false
Reference	Select a location outside of California ...	400	location_other	false

**Note:** **Name** and **Active** are not displayed by default, so you need to manually add them to the list by selecting the Update Personalize List gear icon.

4. Set the "false" variables to "true" so that they match the image below.

Type	Question	Order	Name	Active
Select Box	Which pack type would you like to order?	100	pack_type	true
Select Box	California delivery?	200	ca_location	true
Reference	Select a California location for delivery	300	location_ca	true
Reference	Select a location outside of California ...	400	location_other	true

5. If your Catalog Item matches the image, go to Section C, step 1. If not, go to the next step and verify if each variable was configured correctly.

**Note:** You might want to seek help if you read this as: if (Catalog Item==image) {go to Section C, step 1} else {go to the next step and verify if each variable was configured correctly}.

6. Select **New** on the Variables Related List.

Question

Type: **Select Box**

Order: **200**

Question: **California delivery?**

Name: **ca\_location**

Default Value

Default value: **yes**

7. **Save** the record to remain on the form.
8. Select **New** on the Question Choices Related List.  
  
Order: **100**  
Text: **Yes**  
Value: **yes**
9. Select **Submit**.
10. Repeat steps 8-9 to add a **NO** Question Choice as well.  
  
Order: **200**  
Text: **No**  
Value: **no**
11. Select **Submit** and **Update**.



**TIP FROM  
THE FIELD:**

Notice the **Text** is mixed case and the **Value** is lowercase. **Text** (like a field label) is just for display. The **Value** should adhere to the rules of the language you are writing for. It is a good habit to be consistent with **Values**, so use lowercase when possible.

## **B. Create Two Variables to Provide Location Selections**

1. On the **Brother Network-Ready Printer Toner** Catalog Item form, select **New** on the Variables Related List.
2. Create a California locations only reference field.  
  
Type: **Reference**  
Order: **300**  
  
Question  
Question: **Select a California location for delivery**  
Name: **location\_ca**  
  
Type Specifications tab  
Reference: **Location [cmn\_location]**  
Reference qualifier condition: **State/Province | contains | CA**
3. Select **Submit**.
4. Select **New** on the Variables Related List again.
5. Create a non-California locations reference field.  
  
Type: **Reference**  
Order: **400**  
  
Question  
Question: **Select a location outside of California for delivery**  
Name: **location\_other**

Type Specifications tab

Reference: **Location [cmn\_location]**

Reference qualifier condition: **State/Province | does not contain | CA**

6. Select **Submit**.
7. Compare your **Brother Network-Ready Printer Toner** Variable records with the image below. Since you are double-checking, hopefully everything is fine.

Order

Search

Actions on selected rows...

New

Catalog item = Brother Network-Ready Printer Toner

<input type="checkbox"/>	Type	Question	Order	Name	Active
<input type="checkbox"/>	Select Box	Which pack type would you like to order?	100	pack_type	true
<input type="checkbox"/>	Select Box	California delivery?	200	ca_location	true
<input type="checkbox"/>	Reference	Select a California location for delivery	300	location_ca	true
<input type="checkbox"/>	Reference	Select a location outside of California ...	400	location_other	true

## C. Restrict the Alternate Location Selections to Users With the 'itil\_admin' Role

1. On the **Brother Network-Ready Printer Toner** Catalog Item form, open the **Toner Choices by Role** Catalog Client Script you created in Lab 4.1.
2. Add statements to the existing script to also restrict the display of the **California delivery? [ca\_location]** and **Select a location outside of California for delivery [location\_other]** fields to users with the 'itil\_admin' role.

```
1 function onLoad() {  
2  
3     if (!g_user.hasRoleExactly('itil_admin')) {  
4         g_form.removeOption('pack_type', 'cym3');  
5         g_form.removeOption('pack_type', 'cym6');  
6         g_form.setDisplay('ca_location', false);  
7         g_form.setDisplay('location_other', false);  
8     }  
9 }
```

3. Select **Update**.

## D. Use a Catalog UI Policy to Display the Correct Location Fields

Since the Catalog Client Script is already controlling who can view the **California delivery [ca\_location]** and **Select a location outside of California for delivery [location\_other]** fields, only one Catalog UI Policy is needed to display the correct Location field to the users who can see the fields, as well as script the display of user-friendly Field messages.

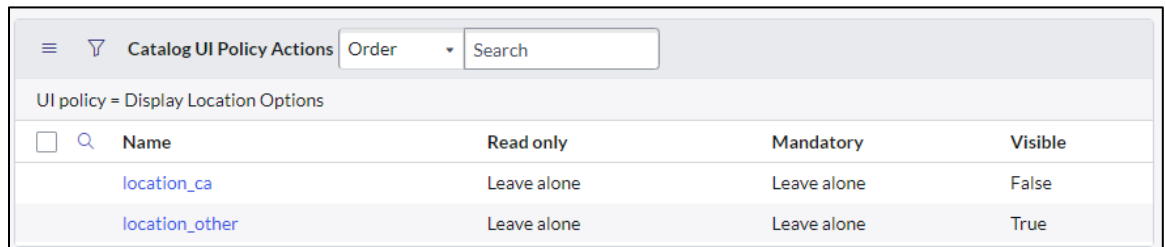
**Note:** For Section D you are basically verifying that the Catalog UI Policy has been pre-configured for you.

1. From the **Brother Network-Ready Printer Toner** Catalog Item form, verify that the following is displayed on the Catalog UI Policies Related List.

Short description: **Display Location Options**

Catalog Conditions: **ca\_location | is | No**

2. **Save** the record to remain on the form.
3. Compare your **Catalog UI Policy Actions** with the image below. If it matches, go to Section E, step 1. If not, go to the next step and add the variables.



Catalog UI Policy Actions				
UI policy = Display Location Options				
<input type="checkbox"/>	Name	Read only	Mandatory	Visible
<input type="checkbox"/>	location_ca	Leave alone	Leave alone	False
<input type="checkbox"/>	location_other	Leave alone	Leave alone	True

4. Select **New** on the *Catalog UI Policy Actions* Related List.

Variable name: **location\_ca**

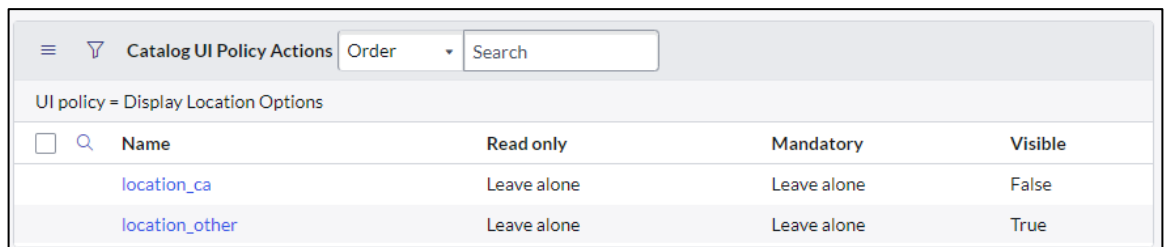
Visible: **False**

5. Select **Submit**.
6. Add one more Catalog UI Policy Action.

Variable name: **location\_other**

Visible: **True**

7. Compare your newly created **Catalog UI Policy Actions** with the image below.



Catalog UI Policy Actions				
UI policy = Display Location Options				
<input type="checkbox"/>	Name	Read only	Mandatory	Visible
<input type="checkbox"/>	location_ca	Leave alone	Leave alone	False
<input type="checkbox"/>	location_other	Leave alone	Leave alone	True

## E. Inform Users of Additional Shipping Fees Outside of California

1. Select the **Script** tab on the *Display Location Options* Catalog UI Policy form.
2. **Select (check)** the *Run scripts* field.

3. Examine the pseudo-code for the script you will write:

- If the item is not being delivered to a California location
  - Add a field message below the 'Select a Location' field advising the user that additional shipping fees apply to out of State deliveries.
- If the item is being delivered to a California location
  - Ensure no field messages are on the form.

4. Write the **Execute if true** script.

```
1 function onCondition() {  
2   //using 'error' as the Type for high impact on the form  
3   g_form.showFieldMsg('location_other', 'PLEASE NOTE: Additional shipping fees apply to out  
   of State deliveries. The location you select in this field will be charged any additional  
   costs.', 'error');  
4 }
```

5. Write the **Execute if false** script.

```
1 function onCondition() {  
2   //Removes existing Msgs if user updates 'California location?' to yes  
3   g_form.hideAllFieldMsgs();  
4 }
```

6. Select **Update**.


## F. Test Your Work

The System Administrator does not have the 'itil\_admin' role, therefore you do not have to impersonate anyone to confirm that non-California delivery fields do not display on the Catalog Item form.

1. Select **Try It** on the *Brother Network-Ready Printer Toner* Catalog Item's Header bar.
2. Complete the **Which pack type would you like to order?** and **Select a California location for delivery** fields. Were the fields displayed as shown below? If not, debug and re-test.

Brother TN 2000 Series Toner

Yields approximately 1200 pages.



Which pack type would you like to order?

Black Cartridge - Single


Select a California location for delivery

135 East Olive Avenue, Burbank, CA

3. Impersonate **Bow Ruggeri** (this user has the 'itil\_admin' role).
4. Locate and open the **Brother Network-Ready Printer Toner** Catalog Item.
5. If these three fields do NOT display on the form as shown below, debug and re-test.
  - Which pack type would you like to order?
  - California delivery?
  - Select a California location for delivery

Brother TN 2000 Series Toner

Yields approximately 1200 pages



Which pack type would you like to order?

-- None --

California delivery?


Yes

Select a California location for delivery

6. Update the value in the *California delivery?* field to **No**. If the following three actions do NOT occur, debug and re-test.
  - The Select a California location for delivery field is NOT visible.
  - The Select a location outside of California for delivery field is visible.
  - The fieldMsg advising users of the additional shipping fees is visible below the *Select a location outside of California for delivery* field in red.

Brother TN 2000 Series Toner

Yields approximately 1200 pages



Which pack type would you like to order?

-- None --

California delivery?

No


Select a location outside of California for delivery

PLEASE NOTE: Additional shipping fees apply to out of State deliveries. The location you select in this field will be charged any additional costs.

7. Update the value in the *California delivery?* field to **Yes**. If the following three actions do not occur, debug and re-test.
  - The Select a California location for delivery field is visible.
  - The Select a location outside of California for delivery field is NOT visible.
  - The fieldMsg no longer appears on the form.

Brother TN 2000 Series Toner

Yields approximately 1200 pages



Which pack type would you like to order?

-- None --

California delivery?

Yes

Select a California location for delivery

8. End the impersonation. You should be logged in as the *System Administrator* when this step is complete.

## Lab Completion

Great job! With a little bit of help from the sock monkeys you got a chance to see how easy it is to implement one single Catalog UI Policy to perform numerous actions. It is considered good practice to use a Catalog UI Policy vs. a Catalog Client Script whenever possible.