

Creating a Data Policy

1 message

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You can create a new data policy to define data rules for a table.

About this task

Create data policies to enforce consistency. You can create data policies only for tables and database views that are in the same scope as the data policy and for other tables that have at least one field in the same scope as the data policy. For tables that are in a different scope from the data policy record, you can create data policy rules only for fields in the same scope as the data policy and you cannot make a field mandatory.

Procedure

1. Navigate to **Data Policies** by completing one of the following actions.
 - Navigate to **System Policy > Rules > Data Policies**.
 - From any form header, right-click the header bar and select **Configure > Data Policies**.
 - In List v2, open any column context menu and select **Configure > Data Policies**.
 - In List v3, open the list title menu and select **Configure > Data Policies**.

2. Click **New**.

3. Select any options for the data policy.

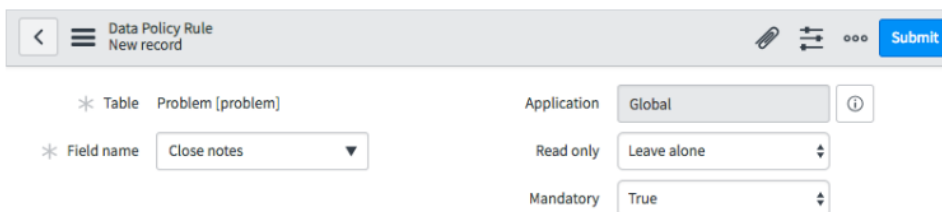
4. Create the condition that must exist for the platform to apply this policy.

For example, your conditions might include **[Problem state] [is] [Closed/Resolved]**

5. Right-click the header and select **Save**.

The **Data Policy Rules** related list appears.

6. Click **New** in the related list and create the record that identifies the field and the policy to apply.



It is possible to have multiple rules on a single field, but it is not recommended.

7. Click **Submit**.

<
☰
Data Policy
Require Close Notes
✎
📶
⌵
⋮
Update
Delete

* Table
Problem [problem] ▼
Application
Global
ⓘ

Inherit
☐
Apply to import sets
☒

Reverse if false
☐
Apply to SOAP
☒

Active
☒
Use as UI Policy on client
☒

Short description
Require Close Notes ⓘ

Description

Conditions
Add Filter Condition
Add "OR" Clause

Problem state ▼
is ⌵
Closed/Resolved ⌵

Update
Delete

Related Links

[Convert this to UI Policy](#)

☐ Data Policy Rules
 New

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🔍 Data Policy = Require Close Notes

	🔍	☰ Field name	☰ Mandatory	☰ Read only
<input type="checkbox"/>	📘	<u>close_notes</u>	True	Leave alone

8. (Optional) Add more rules by repeating steps 6 and 7.