

## Enforcing Mandatory Fields Using UI Policies and Migrating Changes with Update Sets

### Problem Statement:

In this project, we address this issue by implementing a UI Policy that makes the Priority field mandatory when the State of an incident is set to In Progress. Additionally, we capture and migrate this configuration using Update Sets, enabling seamless deployment across different ServiceNow instances.

### Objective:

Demonstrate exporting and importing the Update Set, ensuring configurations can be easily transferred between environments.

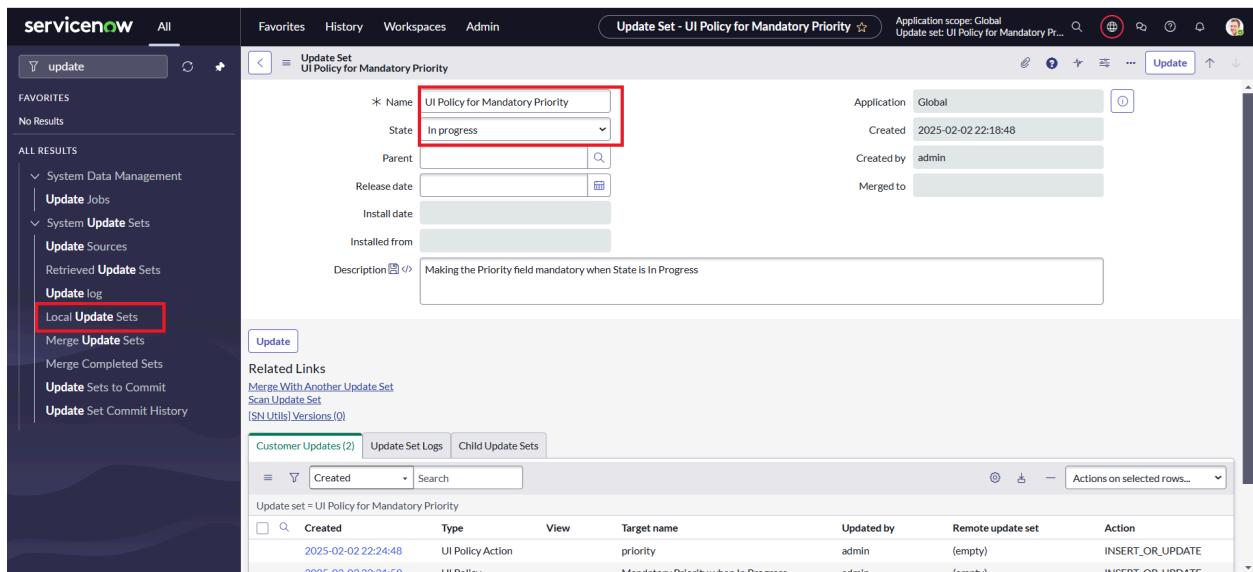
**Skills:** Ui Policy, Ui Actions and Update Sets.

## TASK INITIATION

### Milestone 1 : Update Sets

#### Activity 1: Create Update Set

1. Open service now.
2. Click on All >> search for Update Sets
3. Select Local Update Sets
4. Click on new
5. Fill the details below and make current.



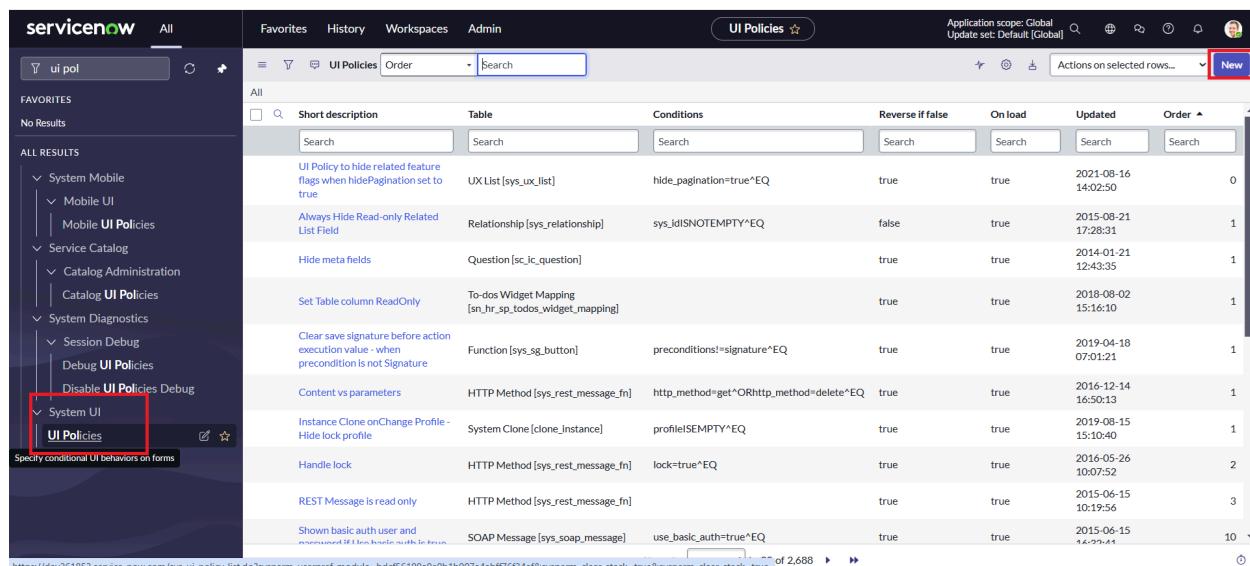
The screenshot shows the ServiceNow interface for creating a UI Policy. The left sidebar has 'Local Update Sets' highlighted with a red box. The main panel shows the 'Update Set - UI Policy for Mandatory Priority' record. The 'Name' field is set to 'UI Policy for Mandatory Priority' and 'State' is set to 'In progress'. A note in the description field says 'Making the Priority field mandatory when State is In Progress'. The 'Actions' bar at the top right has 'Update' highlighted.

6. Click on Submit

## Milestone 2: UI policy

### Activity 1: Create UI policy

1. Open service now.
2. Click on All >> search for ui policies
3. Navigate to System UI >> UI Policies
4. Click on new

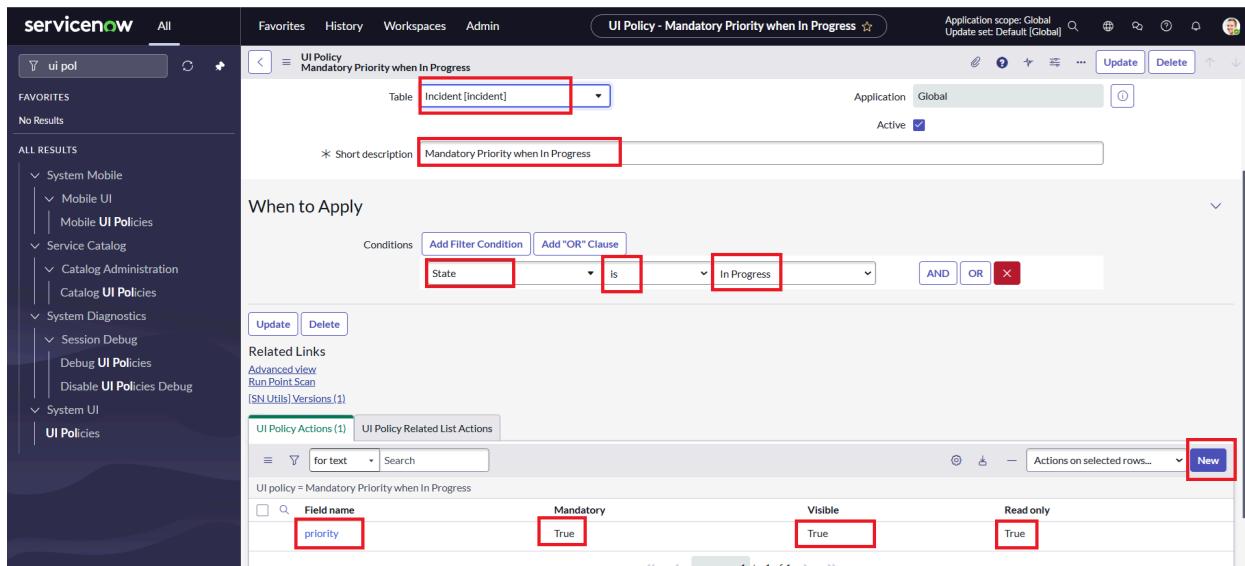


The screenshot shows the ServiceNow interface for managing UI Policies. The left sidebar has 'System UI' and 'UI Policies' highlighted with a red box. The main panel shows a list of UI Policies. The 'New' button in the top right corner is highlighted with a red box.

Short description	Table	Conditions	Reverse if false	On load	Updated	Order
UI Policy to hide related feature flags when hidePagination set to true	UX List [sys_ux_list]	hide_pagination=true^EQ	true	true	2021-08-16 14:02:50	0
Always Hide Read-only Related List Field	Relationship [sys_relationship]	sys_id ISNOTEMPTY^EQ	false	true	2015-08-21 17:28:31	1
Hide meta fields	Question [sc_lc_question]		true	true	2014-01-21 12:43:35	1
Set Table column ReadOnly	To-dos Widget Mapping [an_hr_sp_todos_widget_mapping]		true	true	2018-08-02 15:16:10	1
Clear save signature before action execution value - when precondition is not Signature	Function [sys_sg_button]	preconditions!=signature^EQ	true	true	2019-04-18 07:01:21	1
Content vs parameters	HTTP Method [sys_rest_message_fn]	http_method=GET^OR http_method=DELETE^EQ	true	true	2016-12-14 16:50:13	1
Instance Clone onChange Profile - Hide lock profile	System Clone [clone_instance]	profile IS EMPTY^EQ	true	true	2019-08-15 15:10:40	1
Handle lock	HTTP Method [sys_rest_message_fn]	lock=true^EQ	true	true	2016-05-26 10:07:52	2
REST Message Is read only	HTTP Method [sys_rest_message_fn]		true	true	2015-06-15 10:19:56	3
Shown basic auth user and password in UI for better security in known environments	SOAP Message [sys_soap_message]	use_basic_auth=true^EQ	true	true	2015-06-15 14:27:44	10

5. Fill the following details and Save

## 6. Scroll Down and add ‘priority’ Field on Ui policy Actions

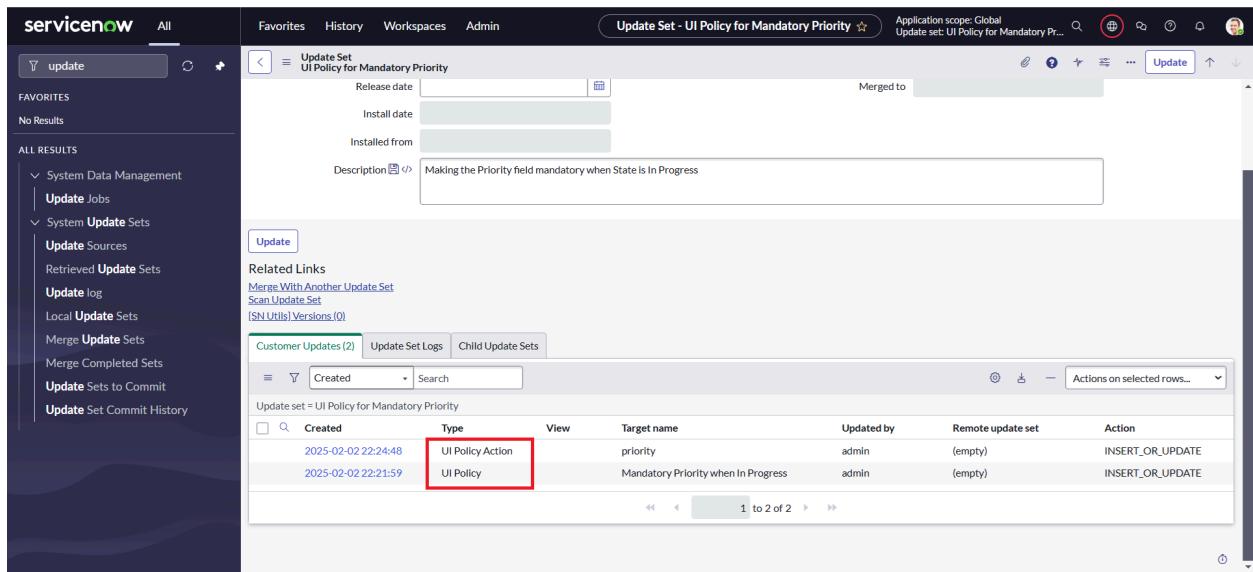


The screenshot shows the ServiceNow UI Policy creation interface. The 'Table' dropdown is set to 'Incident [incident]'. The 'Short description' field contains 'Mandatory Priority when In Progress'. Under 'When to Apply', a condition 'State is In Progress' is defined. In the 'UI Policy Actions' section, a new action is being added for the 'priority' field, which is marked as 'Mandatory' and 'Visible'. The 'New' button is highlighted with a red box.

## 7. Click on submit.

## Activity 2: Check Update Set

1. Navigate to the System Update Sets > Local Update Sets.
2. Open the ‘Ui policy for mandatory priority’ Update Set.
3. Verify that your UI Policy and UI Policy Action are listed.

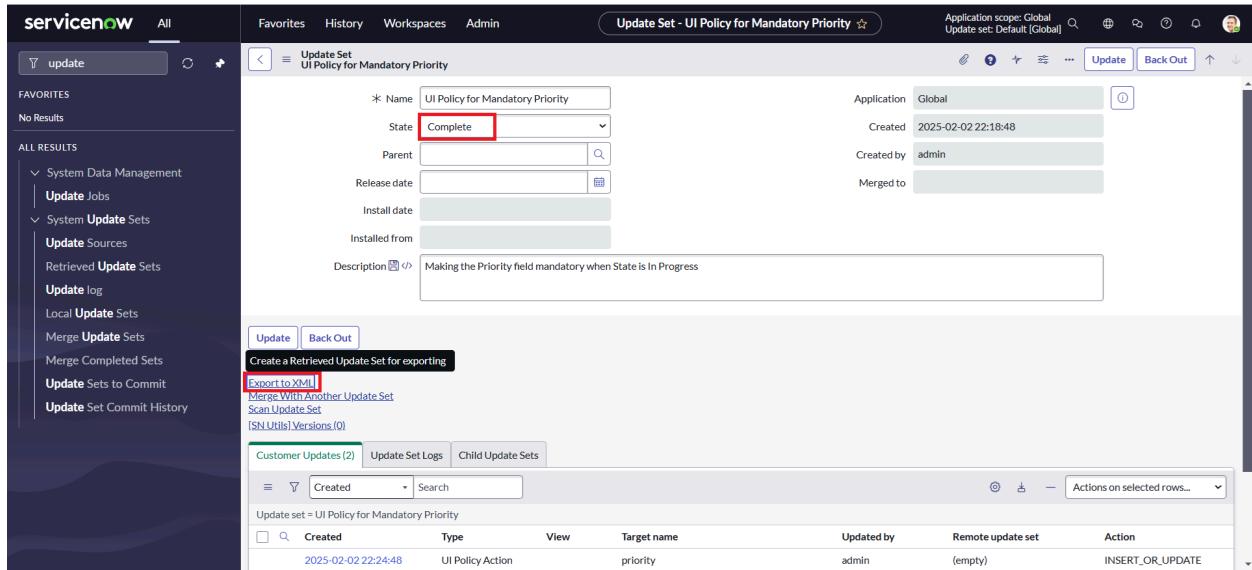


The screenshot shows the ServiceNow Update Set interface for 'UI Policy for Mandatory Priority'. The 'Description' field states 'Making the Priority field mandatory when State is In Progress'. In the 'Customer Updates' table, two entries are listed: one for a 'UI Policy Action' and one for a 'UI Policy', both created by 'admin' on '2025-02-02 22:24:48'. The 'Type' column highlights the 'UI Policy Action' entry with a red box.

Created	Type	View	Target name	Updated by	Remote update set	Action
2025-02-02 22:24:48	UI Policy Action		priority	admin	(empty)	INSERT_OR_UPDATE
2025-02-02 22:21:59	UI Policy		Mandatory Priority when In Progress	admin	(empty)	INSERT_OR_UPDATE

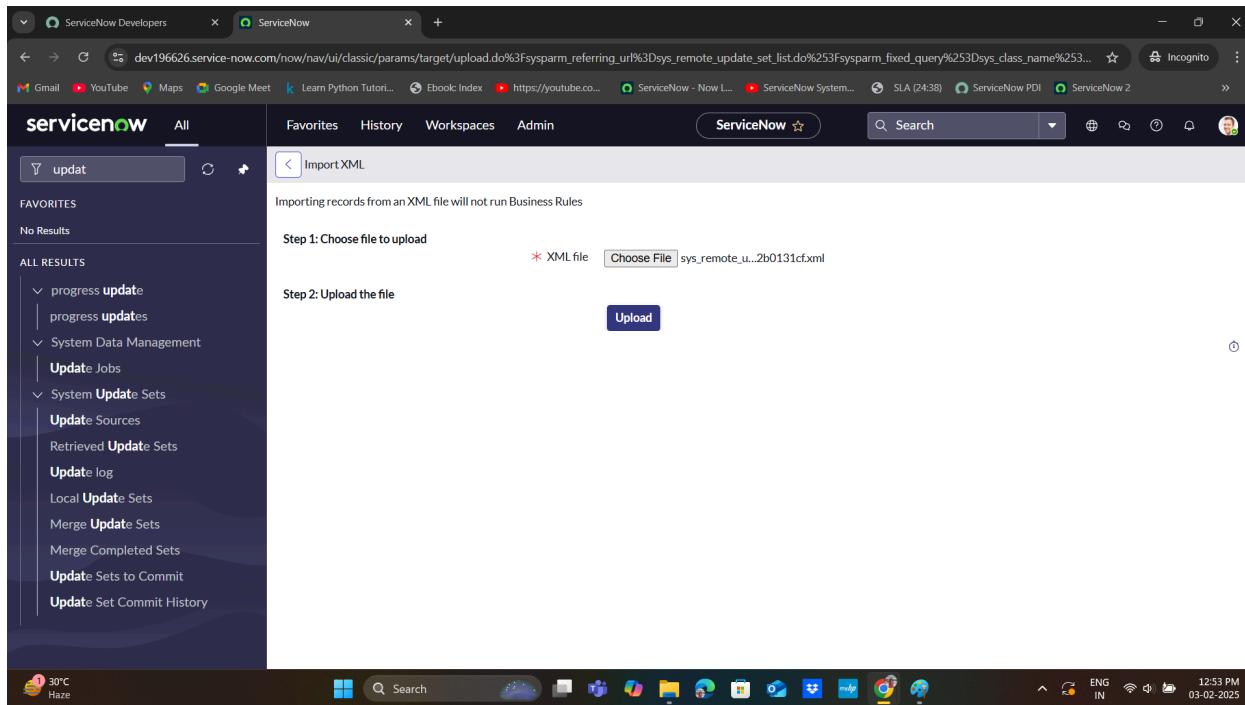
## Activity 3: Export and Import the Update Set

1. Set State to Complete and Click Export to XML on the Update Set record.
2. Download the XML file.



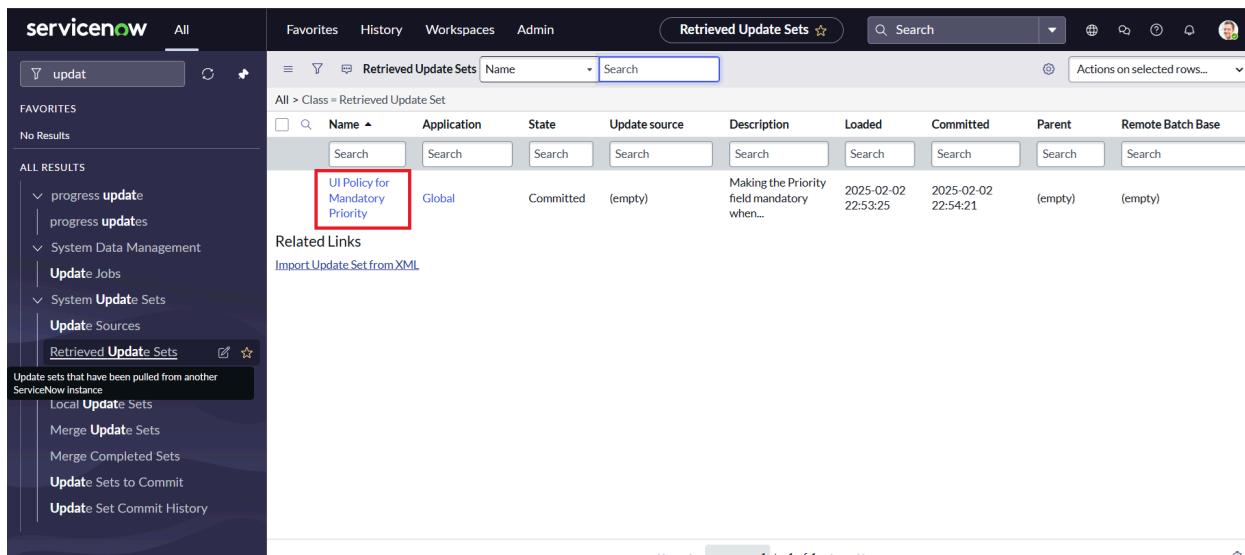
The screenshot shows the ServiceNow Update Set interface. On the left, the navigation bar has 'update' selected. The main area displays the 'Update Set - UI Policy for Mandatory Priority' record. The 'State' field is set to 'Complete'. In the bottom right corner of the record view, there is an action bar with several buttons: 'Update', 'Back Out', 'Create a Retrieved Update Set for exporting', 'Export to XML' (which is highlighted with a red box), 'Merge With Another Update Set', 'Scan Update Set', and '[SN Utils] Versions (0)'. Below the record view, there is a table titled 'Customer Updates (2)' with columns: Created, Type, View, Target name, Updated by, Remote update set, and Action. One row in the table is visible, showing '2025-02-02 22:24:48' in the Created column, 'UI Policy Action' in the Type column, and 'priority' in the Target name column.

3. Now Open Another Instance to Export Update Set.
4. Go to System Update Sets >> Retrieved Update Sets.
5. Click on the Import update set from XML and Select File and Upload



The screenshot shows the ServiceNow Import XML dialog. The URL in the address bar is [https://dev196626.service-now.com/nav/ui/classic/params/target/upload.do?sysparm\\_referring\\_url%3Dsys\\_remote\\_update\\_set\\_list.do%253Fsysparm\\_fixed\\_query%253Dsys\\_class\\_name%253D](https://dev196626.service-now.com/nav/ui/classic/params/target/upload.do?sysparm_referring_url%3Dsys_remote_update_set_list.do%253Fsysparm_fixed_query%253Dsys_class_name%253D). The page title is "ServiceNow". The search bar contains "updat". The left sidebar has a search bar with "updat" and a "FAVORITES" section showing "No Results". The main content area has a heading "Importing records from an XML file will not run Business Rules". It shows two steps: "Step 1: Choose file to upload" with a "Choose File" button and a file path "sys\_remote\_u.2b0131cfxml", and "Step 2: Upload the file" with a "Upload" button. The bottom status bar shows "30°C Haze" and the system status.

6. Open the update set that you have created in your instance here.

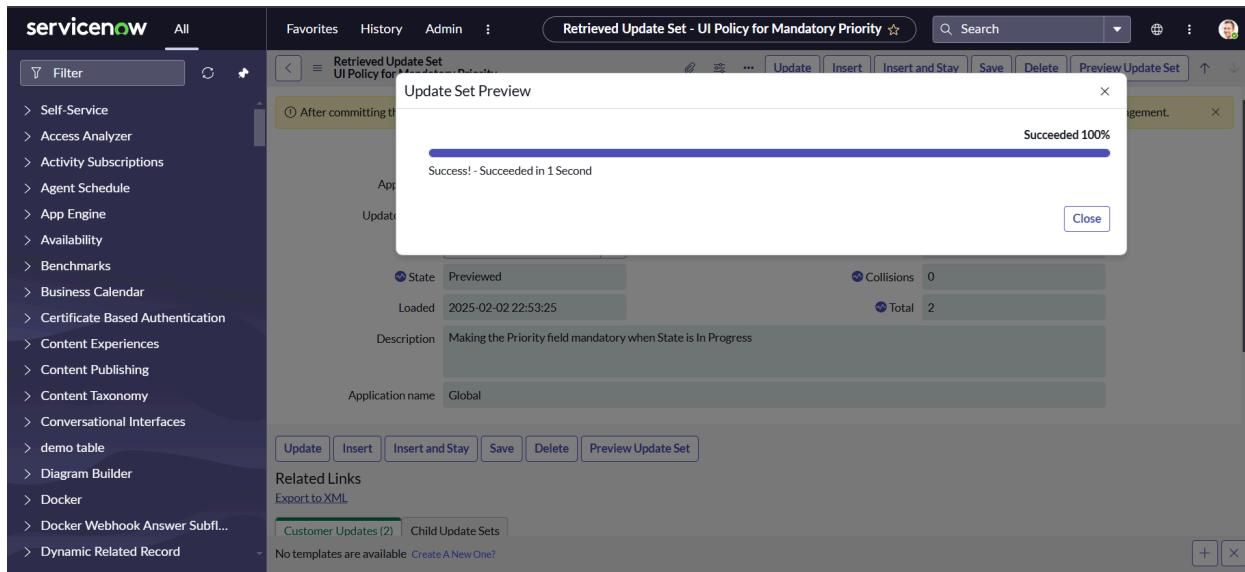


The screenshot shows the ServiceNow Retrieved Update Sets list. The URL in the address bar is [https://dev196626.service-now.com/nav-ui/classic/params/target/list.do?sysparm\\_referring\\_url%3Dsys\\_remote\\_update\\_set\\_list.do%253Fsysparm\\_fixed\\_query%253Dsys\\_class\\_name%253D](https://dev196626.service-now.com/nav-ui/classic/params/target/list.do?sysparm_referring_url%3Dsys_remote_update_set_list.do%253Fsysparm_fixed_query%253Dsys_class_name%253D). The page title is "ServiceNow". The search bar contains "Retrieved Update Sets". The left sidebar has a search bar with "updat" and a "FAVORITES" section showing "No Results". The main content area shows a table with one row. The row details are:

Name	Application	State	Update source	Description	Loaded	Committed	Parent	Remote Batch Base
UI Policy for Mandatory Priority	Global	Committed	(empty)	Making the Priority field mandatory when...	2025-02-02 22:53:25	2025-02-02 22:54:21	(empty)	(empty)

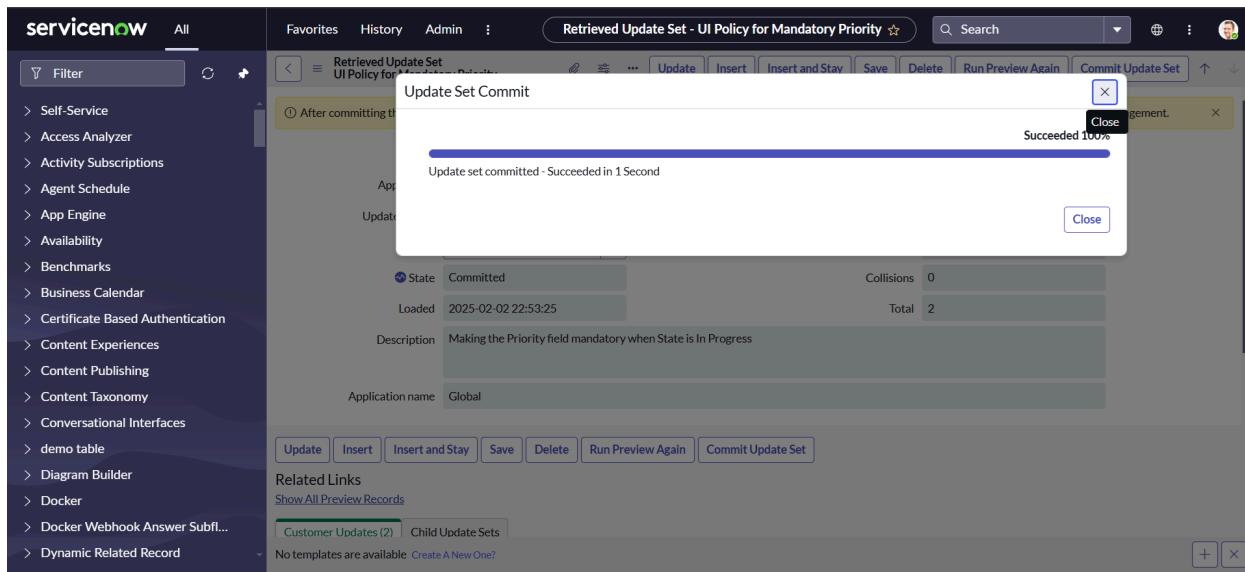
The "Name" column for the first row is highlighted with a red box. The bottom status bar shows "12:53 PM 03-02-2025".

7. Preview the Update Set.



The screenshot shows the ServiceNow interface for managing update sets. A modal window titled "Update Set Preview" is displayed, indicating "Success! - Succeeded in 1 Second". The main pane shows details of the update set, including its state as "Previewed", loaded at "2025-02-02 22:53:25", and a description: "Making the Priority field mandatory when State is In Progress". The application name is listed as "Global". At the bottom, there are buttons for "Update", "Insert", "Insert and Stay", "Save", "Delete", and "Preview Update Set".

### 8. Commit the Update Set.

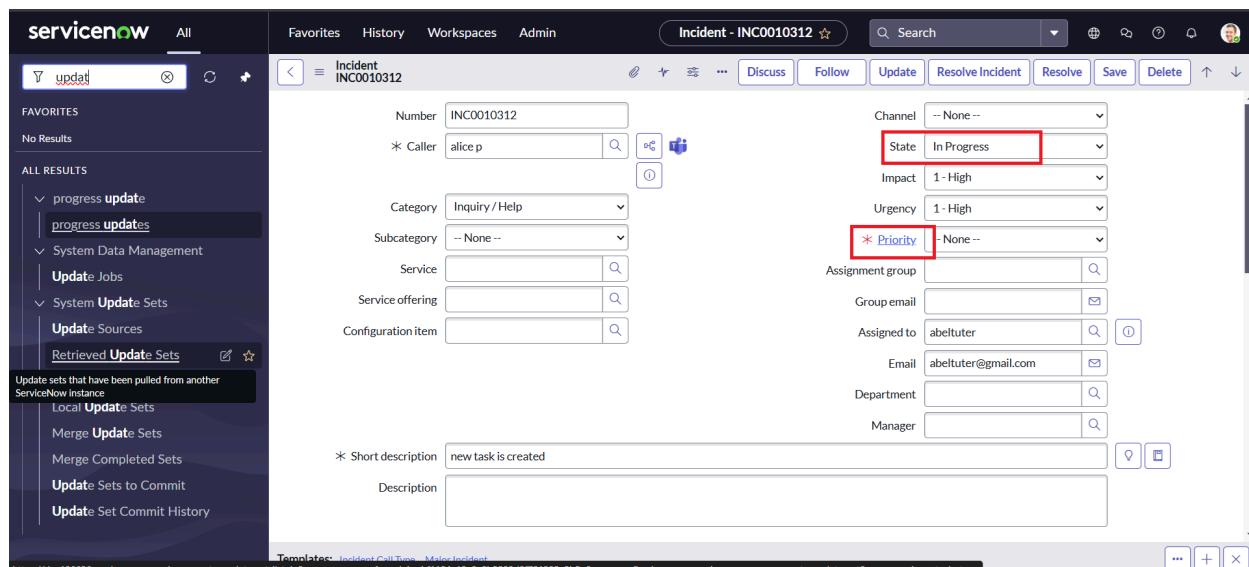


The screenshot shows the ServiceNow interface for committing an update set. A modal window titled "Update Set Commit" is displayed, indicating "Update set committed - Succeeded in 1 Second". The main pane shows the same details as the previous screenshot, with the state now shown as "Committed". The application name is listed as "Global". At the bottom, there are buttons for "Update", "Insert", "Insert and Stay", "Save", "Delete", "Run Preview Again", and "Commit Update Set".

## Milestone 3: Result

### Activity 1: Testing Incident

1. Go to the incident module.
2. Open an existing incident or create a new one.
3. Change the State to In-progress
4. The Priority field should now be mandatory



The screenshot shows the ServiceNow Incident Detail page for incident INC0010312. The 'State' field is set to 'In Progress', which triggers a UI Policy that makes the 'Priority' field mandatory. The 'Priority' field is highlighted with a red border and has a red asterisk (\*) indicating it is required. The 'Short description' field contains the value 'new task is created'. The 'Description' field is empty.

Field	Value
Number	INC0010312
* Caller	alice p
Category	Inquiry / Help
Subcategory	-- None --
Service	
Service offering	
Configuration item	
Channel	-- None --
State	In Progress
Impact	1 - High
Urgency	1 - High
* Priority	(Mandatory field)
Assignment group	
Group email	
Assigned to	abeltuter
Email	abeltuter@gmail.com
Department	
Manager	

Short description: new task is created

Description:

**Conclusion :** This project successfully demonstrates how UI Policies can be used to enforce business rules dynamically without writing scripts. By making the Priority field mandatory when an incident is moved to In Progress, we ensure data completeness and enhance workflow efficiency. Additionally, using Update Sets