

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.

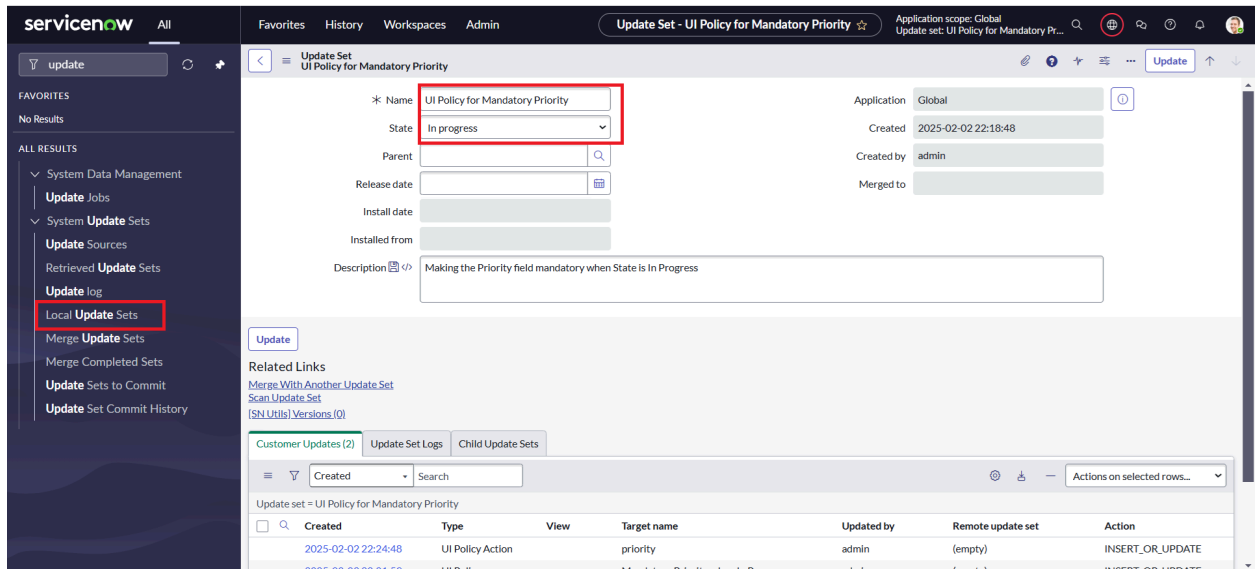
Skills: Ui Policy, Ui Actions and Update Sets.

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 'Update Set - UI Policy for Mandatory Priority' form in ServiceNow. The 'Name' field is 'UI Policy for Mandatory Priority' and the 'State' is 'In progress'. The 'Description' is 'Making the Priority field mandatory when State is In Progress'. The 'Application' is 'Global'. The 'Created' date is '2025-02-22 22:18:48'. The 'Created by' is 'admin'. The 'Merged to' field is empty. The 'Update' button is visible at the bottom right. The left sidebar shows the 'Local Update Sets' menu item highlighted. The bottom section shows a table of 'Customer Updates' with columns: Created, Type, View, Target name, Updated by, Remote update set, and Action.

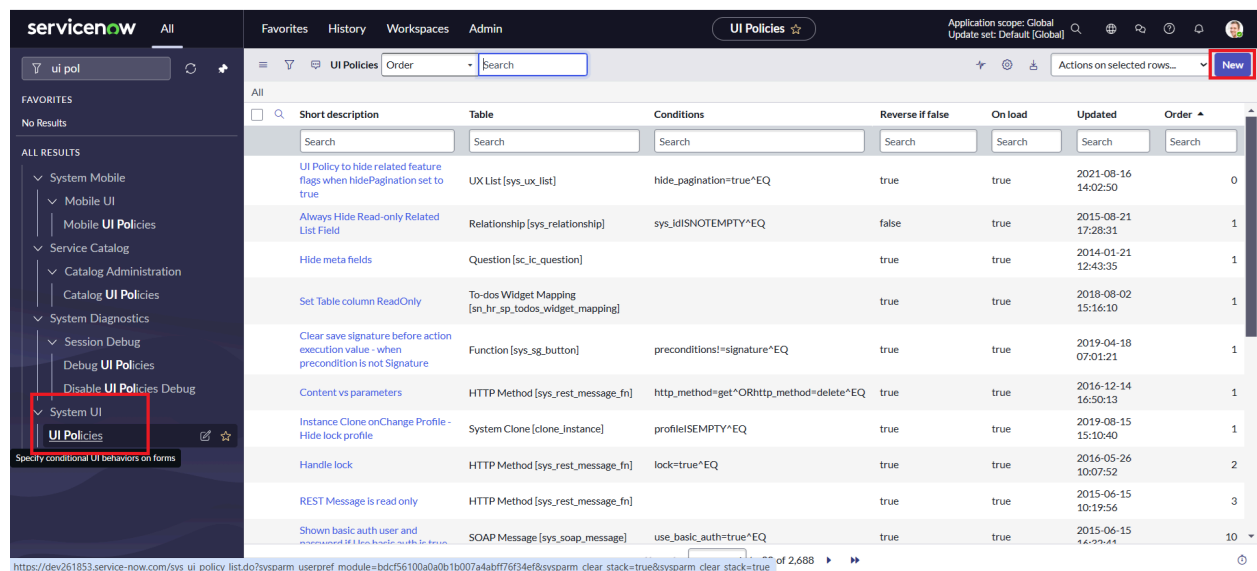
Created	Type	View	Target name	Updated by	Remote update set	Action
2025-02-22 22:18:48	UI Policy Action		priority	admin	(empty)	INSERT_OR_UPDATE

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

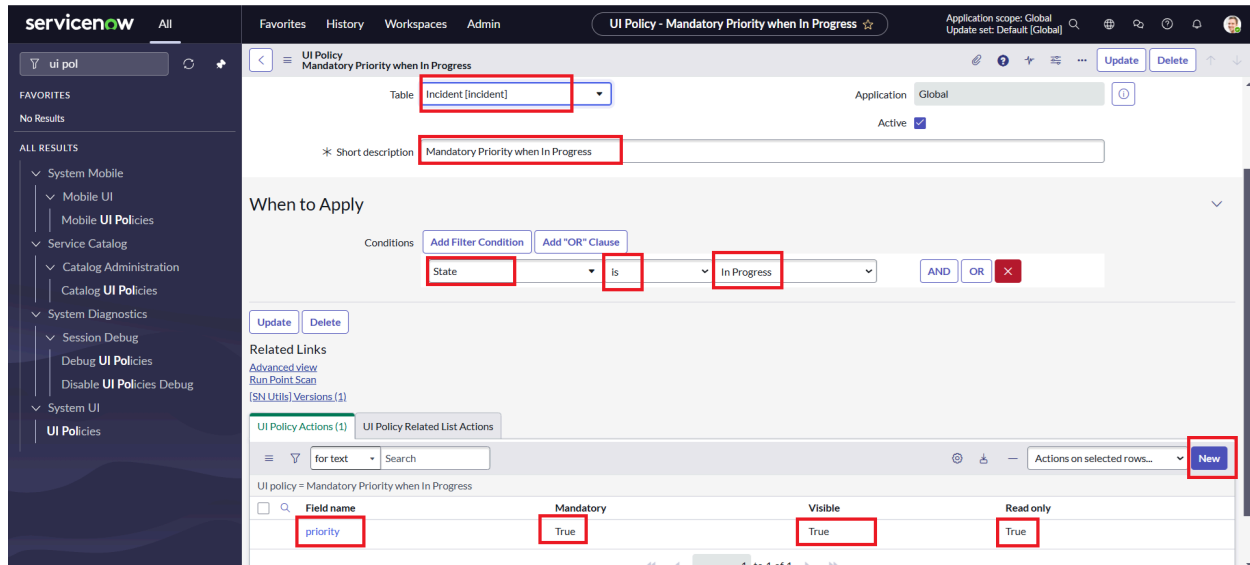


The screenshot shows the 'UI Policies' list in ServiceNow. The 'New' button is highlighted in the top right corner. The table lists various UI policies with columns: Short description, Table, Conditions, Reverse if false, On load, Updated, and Order.

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_idISNOTEMPTY*EQ	false	true	2015-08-21 17:28:31	1
Hide meta fields	Question [sc_ic_question]		true	true	2014-01-21 12:43:35	1
Set Table column ReadOnly	To-dos Widget Mapping [sn_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*ORhttp_method=delete*EQ	true	true	2016-12-14 16:50:13	1
Instance Clone onChange Profile - Hide lock profile	System Clone [clone_instance]	profileISEMPTY*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	SOAP Message [sys_soap_message]	use_basic_auth=true*EQ	true	true	2015-06-15 14:09:44	10

5. Fill the following details and Save

6. Scroll Down and add 'priority' Field on Ui policy Actions



UI Policy - Mandatory Priority when In Progress

Table: Incident [incident]

Application: Global

Active: ☒

* Short description: Mandatory Priority when In Progress

When to Apply

Conditions: Add Filter Condition Add "OR" Clause

State is In Progress

Update Delete

Related Links

Advanced view

Run Point Scan

[SN Utils] Versions (1)

UI Policy Actions (1)

UI Policy Related List Actions

for text Search

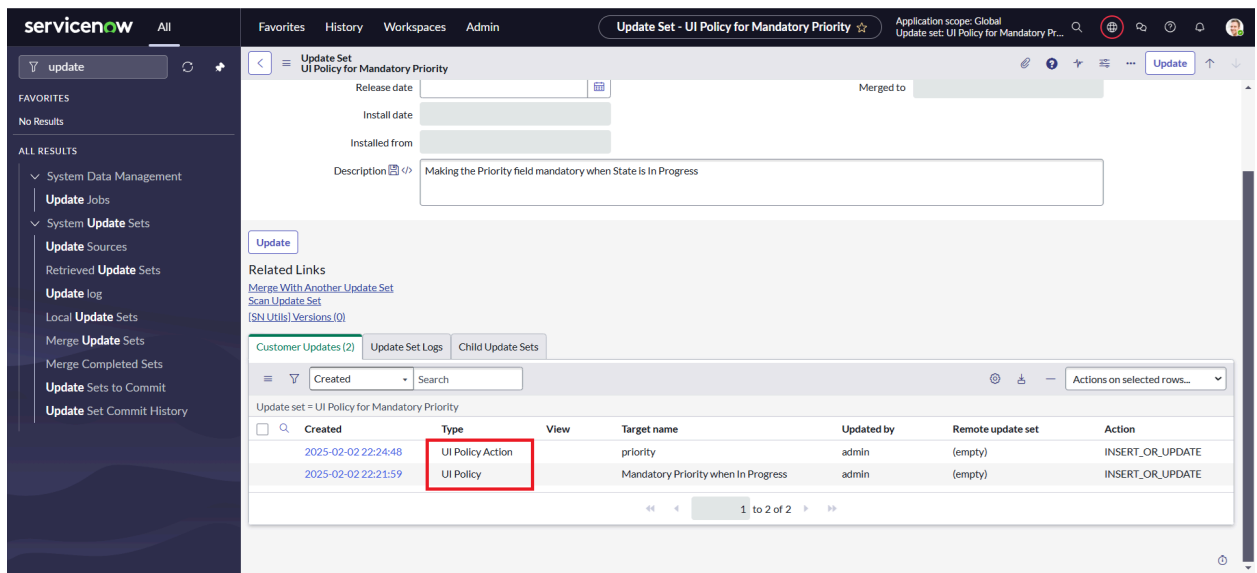
Actions on selected rows... New

Field name	Mandatory	Visible	Read only
priority	True	True	True

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.



Update Set - UI Policy for Mandatory Priority

Release date:

Install date:

Installed from:

Description: Making the Priority field mandatory when State is In Progress

Update

Related Links

Merge With Another Update Set

Scan Update Set

[SN Utils] Versions (0)

Customer Updates (2)

Update Set Logs

Child Update Sets

Created Search

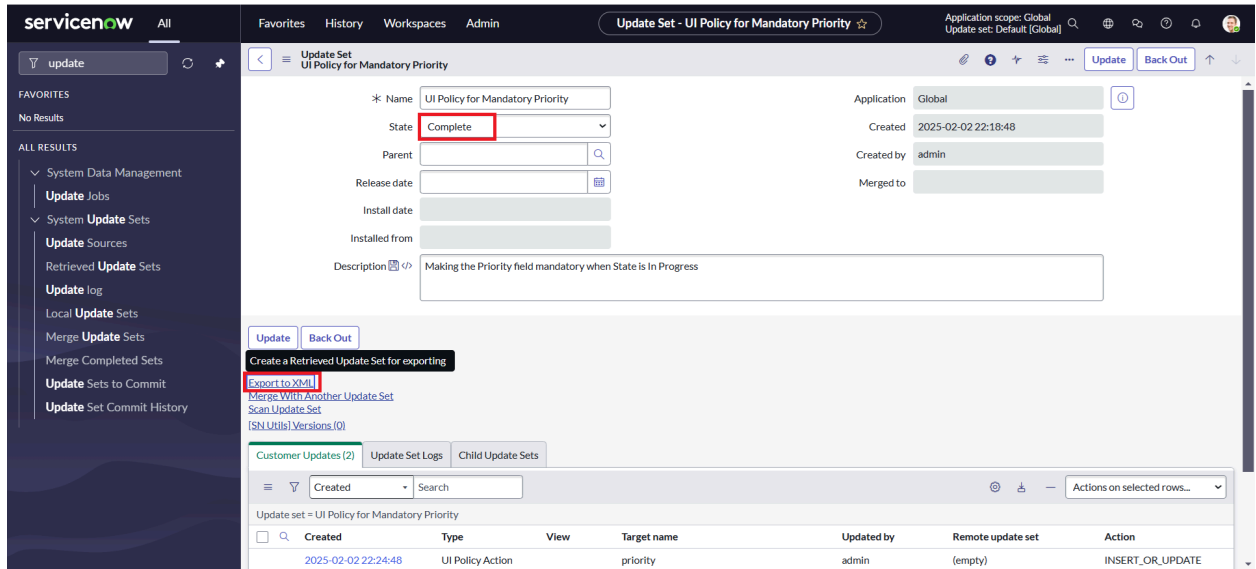
Update set = UI Policy for Mandatory Priority

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

1 to 2 of 2

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.



Update Set - UI Policy for Mandatory Priority

Application: Global
Created: 2025-02-02 22:18:48
Created by: admin
Merged to:

Name: UI Policy for Mandatory Priority
State: Complete
Parent:
Release date:
Install date:
Installed from:
Description: Making the Priority field mandatory when State is In Progress

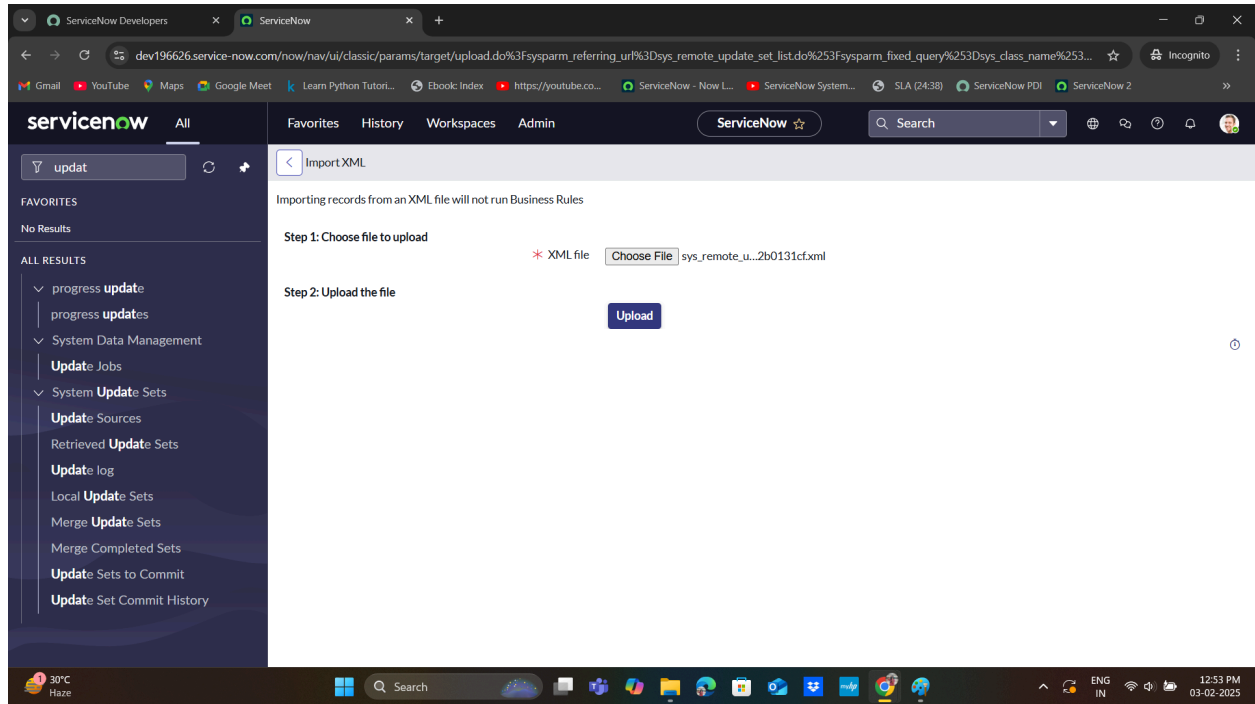
Update | Back Out

Create a Retrieved Update Set for exporting
Export to XML
[Merge With Another Update Set](#)
[Scan Update Set](#)
[\[SN Utils\] Versions \(0\)](#)

Customer Updates (2) | Update Set Logs | Child Update Sets

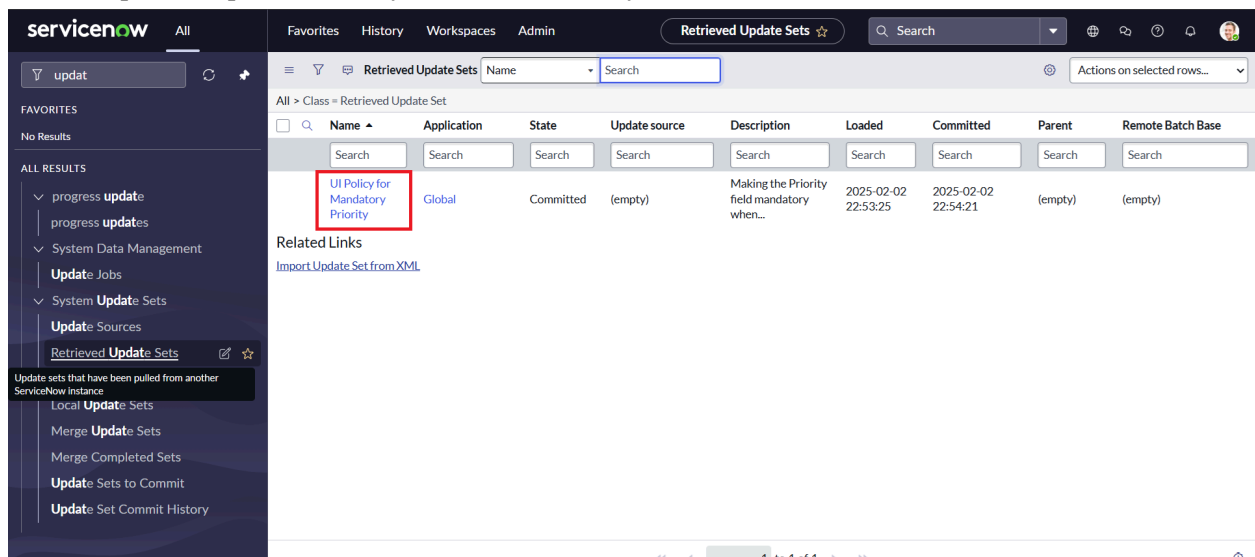
Type	Created	Type	View	Target name	Updated by	Remote update set	Action
<input type="checkbox"/>	2025-02-02 22:24:48	UI Policy Action		priority	admin	(empty)	INSERT_OR_UPDATE

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' interface. The left sidebar contains a navigation menu with 'update' selected. The main content area has a title 'Import XML' and a subtitle 'Importing records from an XML file will not run Business Rules'. It includes two steps: 'Step 1: Choose file to upload' with a 'Choose File' button and a file name 'sys_remote_u...2b0131cf.xml', and 'Step 2: Upload the file' with an 'Upload' button. The bottom of the screen shows a Windows taskbar with a search bar and various application icons.

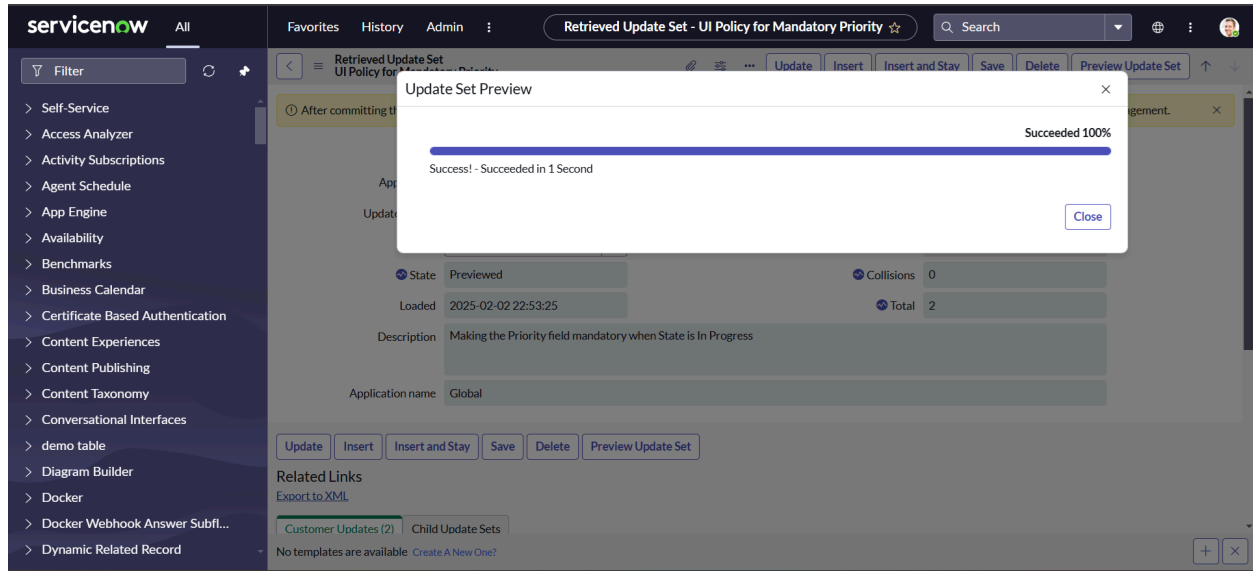
6. Open the update set that you have created in your instance here.



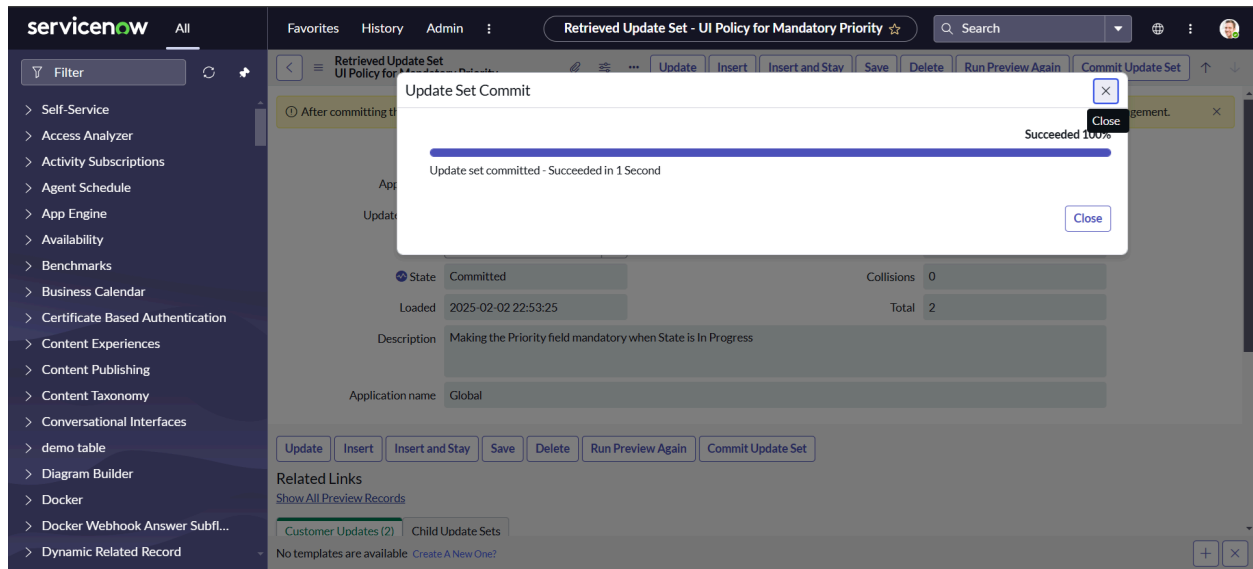
The screenshot shows the ServiceNow 'Retrieved Update Sets' table. The left sidebar is the same as in the previous screenshot. The main content area shows a table with columns: Name, Application, State, Update source, Description, Loaded, Committed, Parent, and Remote Batch Base. A red box highlights the 'Name' column header. Below the table, there is a 'Related Links' section with a link 'Import Update Set from XML'. The bottom of the screen shows a Windows taskbar with a search bar and various application icons.

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)

7. Preview the Update Set.



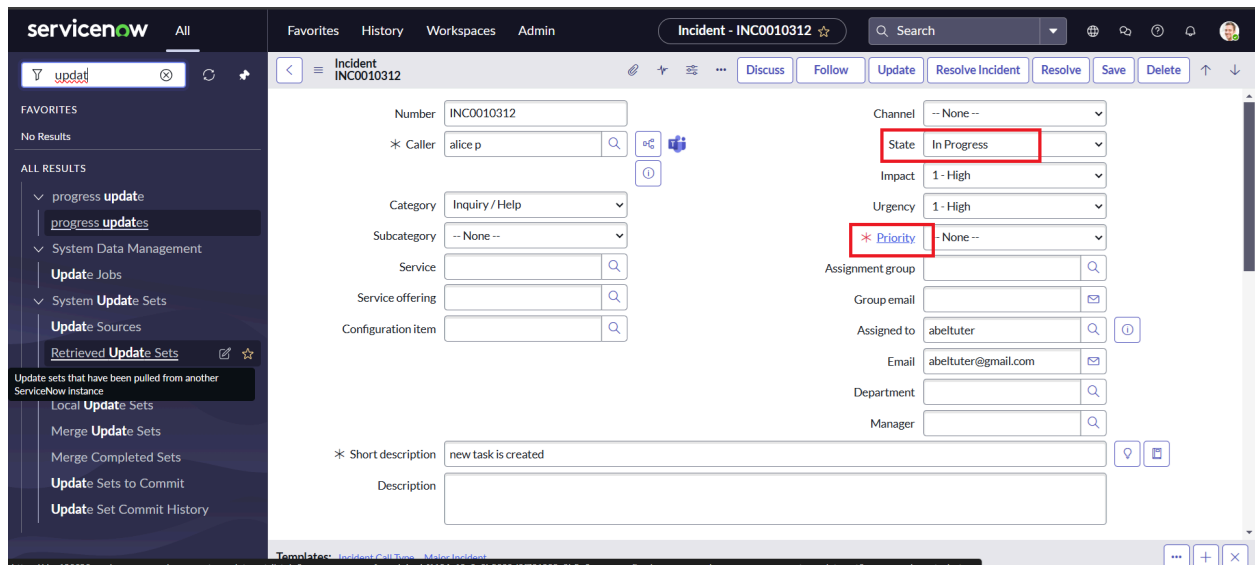
8. Commit the Update Set.



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 is In-progress
4. The Priority field should now be mandatory



The screenshot shows the ServiceNow Incident form for INC0010312. The form is divided into several sections. On the left, there is a sidebar with 'Favorites' and 'All Results'. The main form area contains the following fields:

- 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: -- None --
- 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