

Lesson 2 Location Groups and Pages

2.1 Requirements

In this exercise, you add a new left menu link for policy terms to the Account File in PolicyCenter. Clicking the menu link opens a new page that displays a list of all the policy terms.

2.2 Configuration



Activity

1. Add a new Location Ref for Policy Terms in the Account File Location Group.
2. Create a new page for Policy Terms. The following are some tips.

- a) You can copy an existing page, for example `AccountFile_Roles.pcf`.

Note: It is recommended not to copy and reuse any portion on the `AccountFile_Summary` page because it uses the dashboard and tile elements, which are special for summary pages.

- b) Update the titles, entry points, etc.
- c) Remove the `Screen` element.
- d) Copy the `ScreenRef` element from `Policy_CurrentPoliciesPopup.pcf` and paste it into the new page for Policy Terms .

2.3 Verification

1. Log in to PolicyCenter as Alice Applegate with `aapplegate/gw`.
2. Reload PCF files.
3. Go to any account.
4. Policy Terms link on sidebar displays the Policies list view.s

The screenshot shows the PolicyCenter interface for the 'Wright Construction' account. The top navigation bar includes 'Actions', 'Account' (Wright Construction, Account # C000212105), and a search bar. The left sidebar has links for 'Summary', 'Policy Terms' (which is highlighted with a red box), 'Contacts', and 'Locations'. The main content area is titled 'Policy Terms' and displays a table of policies. The table has columns for Policy #, Product, Status, and Dates Effective. Three rows of data are visible:

Policy #	Product	Status	Dates Effective
1543488204	Businessowners	In Force	08/06/2018 - 08/06/2019
3054854630	Workers' Compensation	In Force	06/06/2018 - 06/06/2019
9565421286	Workers' Compensation	In Force	05/08/2018 - 05/08/2019



Stop

2.4 Solutions



Solution

1. Add a location ref for Policy Terms to the location group file `AccountFile.pcf`.

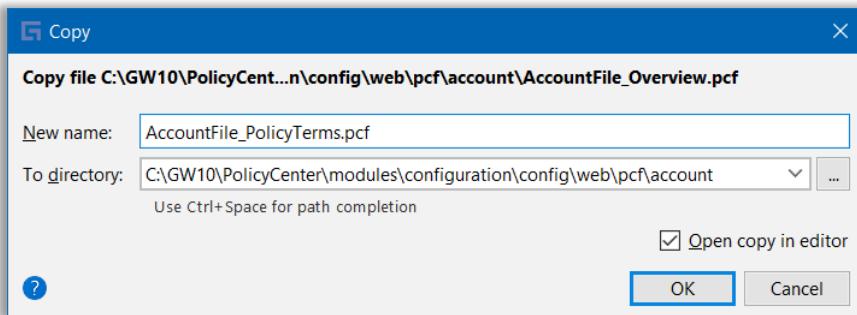
Note: The errors (red areas around the new location ref) will be resolved when the following steps are completed.

The screenshot shows the Pega Studio interface with the following details:

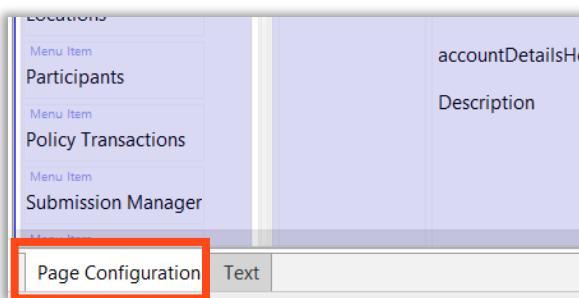
- Path: configuration > config > web > pcf > account > AccountFile.pcf
- Current file: AccountFile.pcf
- Location Group: AccountFile account
- Summary: AccountFile_Overview(account)
- Selected section: Policy Terms: AccountFile_PolicyTerms(account)
- Properties tab is selected.
- Location Ref section:
 - !FeatureCategory.FeatureCategory_Basic!
 - location* AccountFile_PolicyTerms(account)
 - !FeatureCategory.FeatureCategory_Advanced!
 - hidelfDisabled
 - icon
 - iconType <none selected>
 - label DisplayKey.get("Web.AccountFile.PolicyTerms_Ext")
 - minimizedLabel
 - shortcut T

2. Create a new page for Policy Terms.

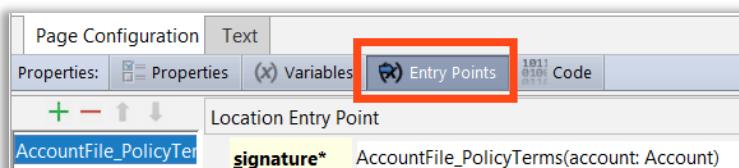
- a) Copy `AccountFile_Roles.pcf` and paste it in the same folder. Name it `AccountFile_PolicyTerms.pcf`.



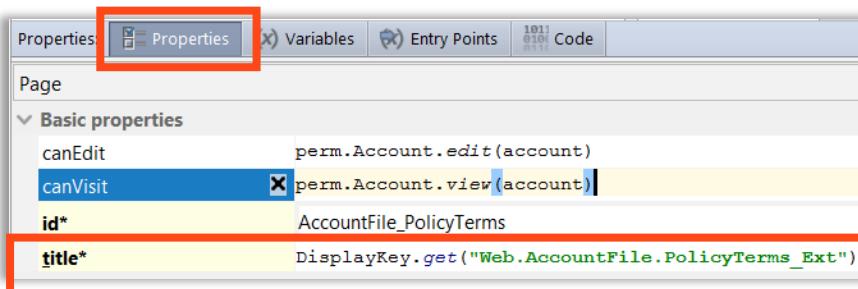
- b) Click on Page configuration to open the PCF editor.



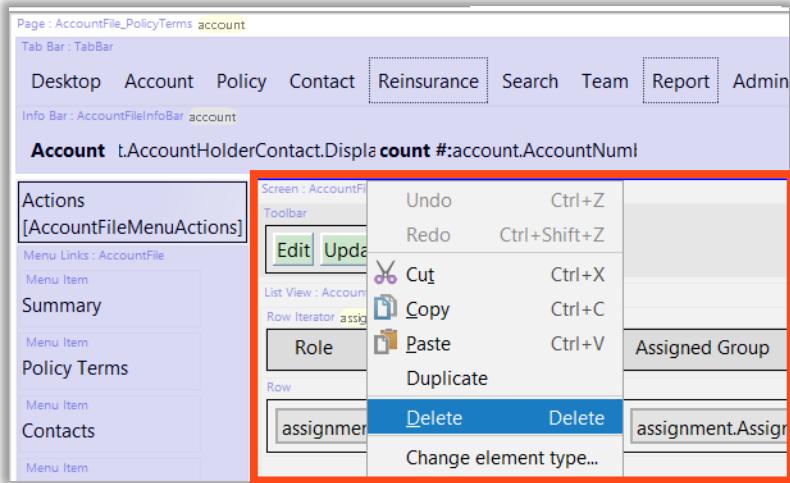
- c) Click on the top level Page element and update the Entry Points to be AccountFile_PolicyTerms (account: Account).



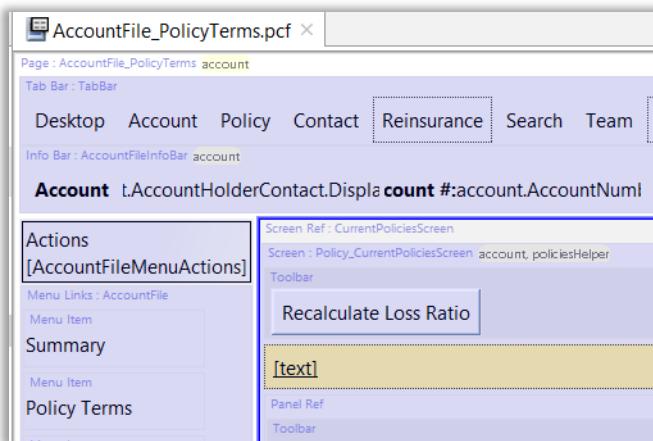
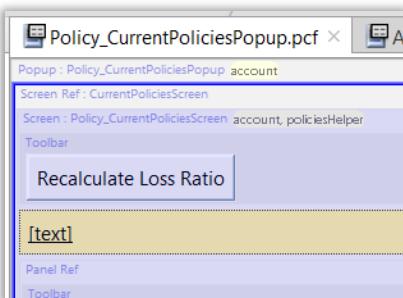
- d) Update the page title on the properties tab of the page element.



- e) Select the Screen element and delete it from the new PCF file.



- f) Click CTRL + N and open the file Policy_CurrentPoliciesPopup.pcf. Copy the ScreenRef element in this file and paste it into AccountFile_PolicyTerms.pcf .



- g) Go to the PolicyCenter application and reload the pages to verify the changes.

2.5 References



Cookbook Recipe

Steps to configure a location group

1. **Create new PCF of type Location Group**
2. **Set essential information:**
 - a) title
 - b) Entry point with matching variable (Entry Points tab)
- Syntax: `EntryPointName (ObjectName : ObjectType)`
- c) A variable for each object in entry point (Variables tab)
3. **Add location references for all included pages and location groups**
4. **Call the new location group in the action property of a navigation widget**

Syntax: `EntryPointName.go(variablesToPass)`

5. **Deploy changes**



Cookbook Recipe

Steps to configure a page

1. **Create new PCF of type Page**
2. **Set essential properties:**
 - a) title
 - b) Entry point with matching variable (Entry Points tab)
 - c) A variable for each object in entry point (Variables tab)
 - d) Add a screen
 - e) Include panels for viewable and/or editable content
3. **For editable pages:**
 - a) Set canEdit property
 - b) Add EditButtons to the page's screen
4. **In the location group that will contain the page, add a locationref widget for navigation to the page**

`LocationPropertyOfLocationRef: EntryPointOfPage (objectsToPass)`

5. **Deploy changes**



Review

Location Groups

A **location group** is a collection of locations used to provide structure and navigation for a group of related pages through menus or other interface elements.

Navigation Hierarchies:

- First level: tab bar
 - Clicking tab bar or menu item results in different location group.
- Second level: menu links (location refs)
 - Clicking menu link stays within the same location group.
 - Only the page that the menu link points to is changed.
 - The menu actions, menu links, info bar and tab bar are unchanged.

Information in a location group include:

- The **Entry points** and **variables** used by navigation widgets.
- The **Location refs** that point to pages or child location groups.
- The **menuActions** property specifies the file to use for contents of the Actions menu. It is optional.
- The **infoBar** property specifies the file to use for contents of the info bar. It is optional.
- The **tabBar** property specifies the file to use for the contents of the tab bar. It is optional.
- Ctrl + Click on the value for the menuActions, infoBar or tabBar opens the file link.
- The **canVisit** attribute determines whether a user can visit the location group. If blank, the canVisit attribute evaluates to true. When the attribute evaluates to false, the tab is not rendered in the user interface.
- Single-screen locations and wizards also have a **canEdit** attribute. Location groups do not have the canEdit property. Editability for location groups is controlled at the level of each page.



Review

Pages

A **page** is a location that contains a single screen in the main frame.

- Used exclusively within location groups.
- Menu link / location ref (in sidebar) pointing to a page.

`LocationPropertyOfLocationRef: EntryPointOfPage (objectsToPass)`

- The rendering of the page in Studio can look as if all the embedded elements are visible in the page.

Information in a page includes:

- Title label of a page in the user interface comes from page's title property.
- The **entry points** and **variables** used by location refs' location property.
- If **canVisit** evaluates to true, the link to a page is visible and clickable.
- A page is either in read-only or edit mode.
- If **canEdit** evaluates to true, the page has Edit/Update buttons.
- If **startInEditMode** is true, then page renders in Edit mode.