

## 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

Account Wright Construction Account # C000212105

### Policy Terms

Status: All Product: All

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

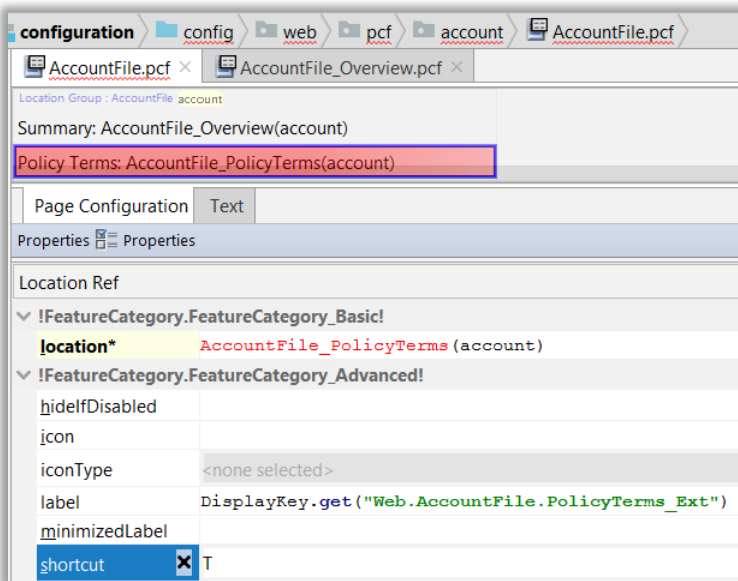


## 2.4 Solutions

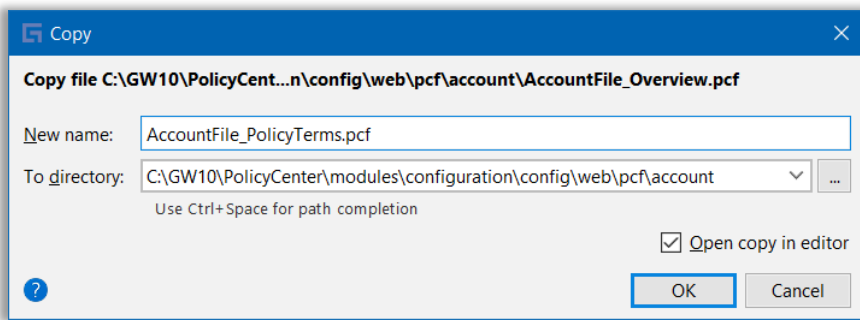


1. Add a location ref for Policy Terms to the location group file `AccountFile.pcf`.

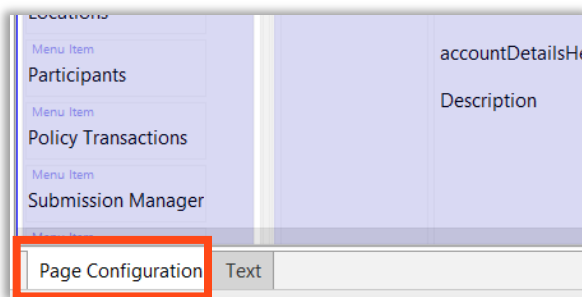
**Note:** The errors (red areas around the new location ref) will be resolved when the following steps are completed.



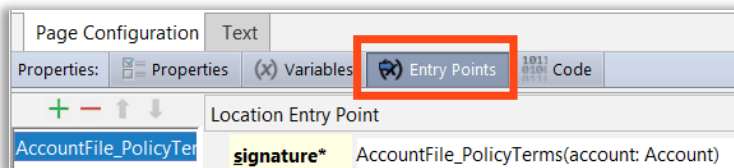
2. Create a new page for Policy Terms.
  - a) Copy `AccountFile_Roles.pcf` and paste it in the same folder. Name it `AccountFile_PolicyTerms.pcf`.



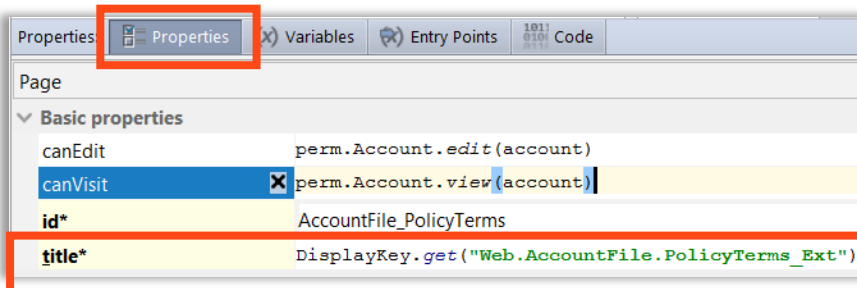
b) Click on Page configuration to open the PCF editor.



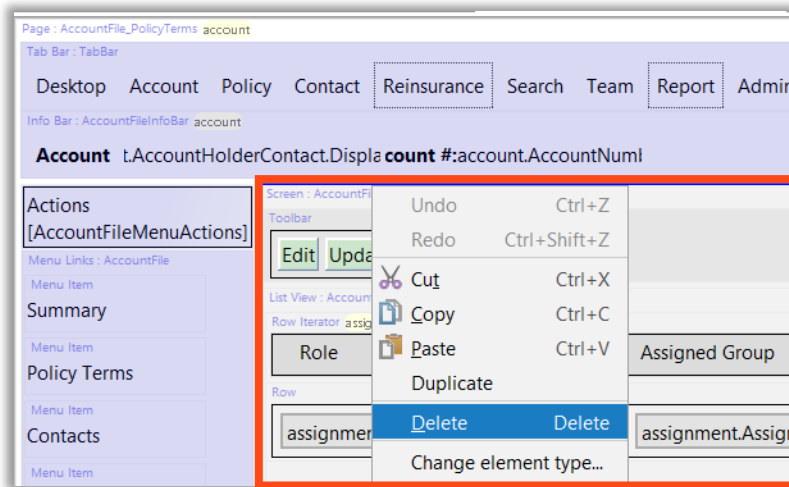
c) Click on the top level Page element and update the Entry Points to be AccountFile\_PolicyTerms(account: Account).



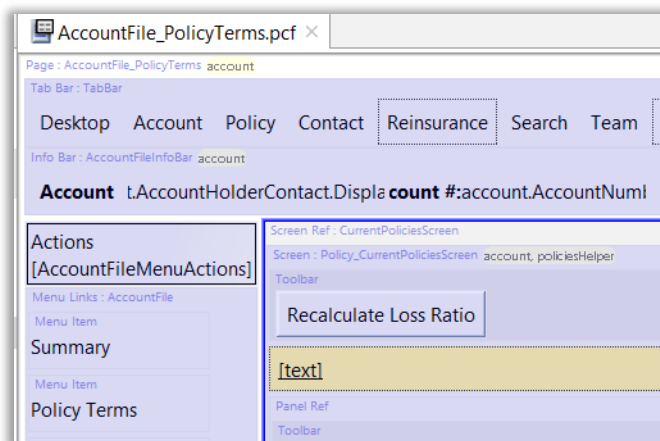
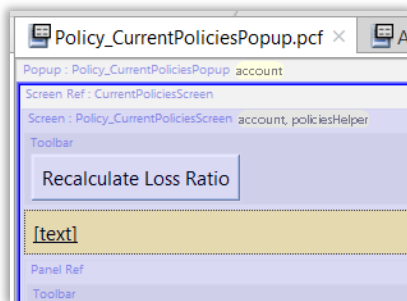
d) Update the page title on the properties tab of the page element.



- 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.