

Lesson 7 Introduction to Locations

The business analysts of an insurance company sent the following user stories:

The screenshot shows a web application titled "TrainingApp". At the top, there are navigation links for "Search" and "Contact". Below the header, a sidebar on the left lists various sections: "Actions", "Summary", "Details", "Addresses (3)", "Notes (5)", "Social Media", "Analysis", "Interactions", and "History". The "Details" section is currently selected and expanded. Within the "Details" section, there is a tab bar with "Person Info" (which is active), "Phone & Addresses", and "Bank Accounts". The main content area displays "Person: William Andy" and "Details". Under "Person Info", the following data is shown:

| | | |
|-------------|------------|--------------|
| Name | Full Name | William Andy |
| Prefix | First Name | William |
| Middle Name | Last Name | Andy |
| Suffix | | |

On the right side of the "Details" section, there is a vertical sidebar with sections for "Employment Info", "License Info", and "Contact Insights". Under "Employment Info", it shows "Occupation" and "Employer" (Albertson's). Under "License Info", it shows "Driver's License" and "State". Under "Contact Insights", there is a link labeled "Contact Insights".

Location User Story #1: “Let’s say we look at a person, e.g. William Andy, and we want to know more details about his employer. Currently the only way to navigate to the employer is searching for it based on the company name. We want to make the employer widget clickable on the person’s Person Info card on the Details page. When the user clicks on it, it should navigate to the Company Info card on the Details page of the company.” – Insurance company business analysts

The screenshot shows a web-based application titled "TrainingApp". At the top, there are navigation links for "Search" and "Contact". The main content area has a header "Company: Albertson's" and a title "Details". On the left, a sidebar lists various sections: Actions, Summary, Details (which is selected), Addresses (1), Notes (0), Social Media, Analysis, Interactions, and History. The "Details" section is expanded, showing tabs for "Company Info", "Phone & Addresses", and "Bank Accounts". The "Company Info" tab is active, displaying the following data:

| | | |
|----------------------|-------------------------------------|---------------------|
| Name | Albertson's | Employee Info |
| Primary Contact | William Andy | Can Have Employee |
| Address | 345 Fir Lane La Canada, CA 91352 | Number of Employees |
| Email Address | | Employees |
| Additional Info | | Name |
| Tax ID | ***** | James Anders |
| Inspection Required? | | Samantha Anne |
| Preferred Currency | | Eric Andy |
| | | William Andy |

To the right of the "Employees" section, there is a vertical list of names: James Anders, Samantha Anne, Eric Andy, and William Andy. Below this is a section titled "Contact Insight".

Location User Story #2: “When we look at a company, e.g. Albertson’s, we can see that it has a Primary Contact. However, currently the only way to know more about that contact is searching for him/her based on the name. We want to make the name of the primary contact navigable, so if the user clicks on it the system will display the Person Info card on the Details page of the person.” – Insurance company business analysts

7.1 Prerequisites

For this exercise, use TrainingApp, Guidewire Studio, and a supported web browser. <http://localhost:8880/ab/ContactManager.do> is the default URL for TrainingApp. To view, edit, and delete various contacts, log in to TrainingApp as Alice Applegate. The login/password for Alice Applegate is aapplegate/gw.

7.2 Lab: Location user story #1

“We want to make the employer widget clickable on the person’s Person Info card on the Details page. When the user clicks on it, it should navigate to the Company Info card on the Details page of the company.” – Insurance company business analyst

7.2.1 Write it down

1. Question: What is the name of the destination PCF file? What is the entry point signature?

2. Question: What is the name of the source PCF file?



7.2.2 Configuration

1. Open Guidewire Studio

- a) From the TrainingApp folder, open a command window and start Guidewire Studio for TrainingApp.
- b) Alternatively, use the Start TrainingApp Studio shortcut.

2. Run or Debug the TrainingApp project

- a) Use the main menu, toolbar, or keystroke to run or Debug the server.
- b) Verify that the Run or Debug Console tab shows ***** ContactManager ready *****.

3. Modify the Employer widget to link to the Employer's Details page

The screenshot shows the Guidewire Studio interface for the 'TrainingApp'. The top navigation bar includes the 'TrainingApp' logo, 'Search | ▾', and 'Contact | ▾'. On the left, a sidebar lists 'Actions', 'Summary', 'Details' (which is currently selected), 'Addresses (3)', 'Notes (5)', 'Social Media', and 'Analysis'. The main content area displays a 'Details' page for a person named 'William Andy'. At the top right, it says 'Person: William Andy'. Below that, there are tabs for 'Person Info', 'Phone & Addresses', and 'Bank Accounts', with 'Person Info' being the active tab. Under 'Person Info', there are fields for 'Name' (Full Name: William Andy, Prefix:), 'Employment Info' (Occupation: , Employer: Albertson's), and 'License Info'. The 'Address' section shows three entries, and the 'Notes' section shows five entries.

Figure 1 Source

The screenshot shows a web-based application interface for 'TrainingApp'. At the top, there are navigation links for 'Search' and 'Contact'. Below the header, a sidebar on the left lists various sections: 'Actions', 'Summary', 'Details', 'Addresses (1)', 'Notes (0)', 'Social Media', 'Analysis', 'Interactions', and 'History'. The 'Details' section is currently selected and expanded. On the right, the main content area displays 'Company: Albertson's' and a 'Details' section. This details section contains tabs for 'Company Info' (which is active), 'Phone & Addresses', and 'Bank Accounts'. Under 'Company Info', there are fields for 'Name' (Albertson's), 'Primary Contact' (William Andy), 'Address' (345 Fir Lane, La Canada, CA 91352), and 'Email Address'. Below this, under 'Additional Info', there are fields for 'Tax ID' (*****), 'Inspection Required?' (checkbox), and 'Preferred Currency'. To the right of the main content, there is a vertical sidebar titled 'Employee Info' which lists 'Can Have Employee', 'Number of Employees', and 'Employees'. The 'Employees' section is expanded, showing a table with columns for 'Name' and 'Value'. The table contains four rows: James Anders, Samantha Andy, William Andy, and Eric Andy. At the bottom of this sidebar is a section titled 'Contact Insight'.

Figure 2 Destination



Hint

Troubleshooting “Widget is not clickable after configuration”

If you configured the source widget’s `action` property and reloaded the PCF changes, but the widget is still not clickable: verify that you are passing in the right data to the destination page. For example, if you wrote this:

```
ABCompanyDetailsPage.go(anABContact)
```

in the widget’s `action` property, then use the `ALT + SHIFT + W` shortcut in the browser to verify what is data in the `anABContact` variable. If it is not the employer, then use the Data Dictionary to find out how you can get access to an ABPerson’s Employer.



Guidewire API

The `action` property

Most atomic widgets have the `action` property. This can be set to a Gosu statement. When set, the atomic widget becomes clickable and when clicked, the Gosu statement is executed.

7.2.3 Verification



Activity

Verify the work you have done

1. Reload the PCF changes

- In TrainingApp, reload the changes to the PCF file(s) and display keys.

2. Go to the Details page for William Andy

- Click on edit and select Albertson's as the employer
- Click on update
- Verify that Albertson's is displayed as a link

| Name | Employment Info |
|--------------|-----------------|
| Full Name | William Andy |
| Prefix | |
| First Name | William |
| Employer | Albertson's |
| Occupation | |
| License Info | |

- Verify if you click on the Albertson's link the application displays the Details page of Albertson's

The screenshot shows a CRM application interface. At the top, there is a navigation bar with the logo 'TrainingApp', a search bar, and a contact dropdown. On the left, a sidebar menu lists various sections: Actions, Summary, Details, Addresses (1), Notes (0), Social Media, Analysis, Interactions, and History. The main content area is titled 'Details' and shows a card for 'Company: Albertson's'. The card has tabs for 'Company Info' (which is selected), 'Phone & Addresses', and 'Bank Accounts'. The 'Company Info' tab displays the following data:

| | |
|----------------------|-------------------------------------|
| Name | Albertson's |
| Primary Contact | William Andy |
| Address | 345 Fir Lane La Canada, CA 91352 |
| Email Address | [redacted] |
| Additional Info | |
| Tax ID | ***** |
| Inspection Required? | [redacted] |
| Preferred Currency | [redacted] |

To the right of the card, there is a sidebar titled 'Employee Info' containing the following settings:

- Can Have Employees? Yes
- Number of Employees 4

Below these settings is a section titled 'Employees' with a 'Cascade Email Address' button. It lists four employees:

| Name | Job Title |
|------------------|------------|
| James Andersen | [redacted] |
| Samantha Andrews | [redacted] |
| William Andy | [redacted] |
| Eric Andy | [redacted] |

At the bottom of the sidebar is a 'Contact Insights' section.

7.3 Lab: Location user story #2

7.3.1 Write it down

"We want to make the name of the primary contact navigable, so if the user clicks on it the system will display the Person Info card on the Details page of the person." – Insurance company business analyst

1. Question: What is the name of the destination PCF file? What is the entry point signature?

2. Question: What is the name of the source PCF file?



7.3.2 Configuration

1. Modify the Primary Contact widget so that it links to the person's Details page.

The screenshot shows a software interface for managing company and contact information. At the top, there is a header with a logo, the text "TrainingApp", and navigation links "Search" and "Contact". The main area is titled "Details" for "Company: Albertson's". On the left, a sidebar lists various sections: Actions, Summary, Details, Addresses (1), Notes (0), Social Media, Analysis, Interactions, and History. The "Details" section is currently selected. The main content area displays "Company Info" with fields for Name (Albertson's), Primary Contact (William Andy), Address (345 Fir Lane, La Canada, CA 91352), and Email Address. Below this is an "Additional Info" section with Tax ID (*****), Inspection Required? (checkbox), and Preferred Currency. To the right, there is a sidebar titled "Employee Info" which lists "Employees" with names James Anders, Samantha Andy, Eric Andy, and William Andy. A "Contact Insight" section is also present. The overall layout is clean and organized, typical of a CRM application.

Figure 1 Source

This screenshot shows a similar software interface for managing individual contacts. The top header includes the "TrainingApp" logo and navigation links "Search" and "Contact". The main title is "Person: William Andy". The left sidebar has the same sections as the previous screenshot: Actions, Summary, Details, Addresses (3), Notes (5), Social Media, Analysis, Interactions, and History. The "Details" section is selected. The main content area displays "Person Info" with fields for Name (Full Name: William Andy, Prefix: , First Name: William, Middle Name: , Last Name: Andy, Suffix:), Employment Info (Occupation: , Employer: Albertson's), License Info (Driver's License: , State:), and Contact Insights. The sidebar on the right is identical to the one in the first screenshot, listing employees James Anders, Samantha Andy, Eric Andy, and William Andy under "Employee Info" and "Employees".

Figure 2 Destination



Hint

Troubleshooting “You do not have the permission required to perform this action: ABCCompanyDetailsPage”



Hint

In InsuranceSuite 9 and earlier, if the company does not have a primary contact, there is no visible link, but the widget is still clickable. If you click on the empty link, TrainingApp will throw an error. If you are working in one of these versions, you must configure the `available` property to fix this:

```
(anABContact as ABCCompany).PrimaryContact != null or CurrentLocation.InEditMode
```

7.3.3 Verification



Activity

Verify the work you have done

1. Reload the PCF changes

- In TrainingApp, reload the changes to the PCF file(s) and display keys.

2. Go to the Details page for Alberton's

- If William Andy is not already the primary contact than click on Edit, select William Andy from the drop down list and click on Update.
 - Note#1: You can select a Primary Contact only from the list of employees.
 - Note#2: If the list of employees is empty, then navigate to William Andy's Details Page and set Albertson's as his employer.
- Verify that William Andy is displayed for the Primary Contact as a link

TrainingApp Search | Contact |

Actions

Company: Albertson's

Details

| | Company Info | Phone & Addresses | Bank Accounts |
|---------------|---|-------------------|---------------------|
| Addresses (1) | Name Albertson's | | Employee Info |
| Notes (0) | Primary Contact William Andy | | Can Have Employee |
| Social Media | Address 345 Fir Lane La Canada, CA 91352 | | Number of Employees |
| Analysis | Email Address | | Employees |
| Interactions | Additional Info | | Name |
| History | Tax ID ***** | | James Anders |
| | Inspection Required? | | Samantha Anderson |
| | Preferred Currency | | Eric Andy |
| | | | William Andy |

Contact Insight

- c) Verify if you click the link on the Primary Contact the application displays the Details page of William Andy

TrainingApp Search | Contact |

Actions

Person: William Andy

Details

| | Person Info | Phone & Addresses | Bank Accounts |
|---------------|-----------------------------------|-------------------|-------------------------|
| Addresses (3) | Name Full Name William Andy | | Employment Info |
| Notes (5) | Prefix | | Occupation |
| Social Media | First Name William | | Employer Albertson's |
| Analysis | Middle Name | | License Info |
| Interactions | Last Name Andy | | Driver's License |
| History | Suffix | | State |

Contact Insights



Stop

7.4 Lab Solution: Location user story #1



7.4.1 Write it down

1. Question: What is the name of the destination PCF file? What is the entry point signature?

```
ABCompanyDetailsPage.pcf
```

```
ABCompanyDetailsPage(anABContact : ABContact)
```

2. Question: What is the name of the source PCF file?

```
ABContactDetailsPersonDV.pcf
```

7.4.2 Configuration

1. Modify the Employer widget's action property in ABContactDetailsPersonDV.pcf:

```
ABCompanyDetailsPage.go( (anABContact as ABPerson) .Employer)
```

ABContactDetailsPersonDV.pcf

Detail View : ABContactDetailsPersonDV anABContact

Name

| | | | |
|-------------|--------------------------------------|-----------------------------------|------------------------------------|
| Full Name | (anABContact as ABPerson).FullNa... | Occupation | (anABContact as ABPerson).Occup... |
| Prefix | (anABContact as ABPerson).Pre... | Employer | (anABContact as ABPerson).Em... |
| First Name | (anABContact as ABPerson).FirstNa... | Input Set Ref | |
| Middle Name | (anABContact as ABPerson).Middle... | Shared section mode: ARAIndicator | |

Page Configuration **Text**

Properties: **Properties** **Layout config** **Reflection** **PostOnChange**

Range Input

Basic properties

| | |
|--------------------|--|
| editable | true |
| id* | Employer |
| label | DisplayKey.get("Training.Employer") |
| required | |
| value* | (anABContact as ABPerson).Employer |
| valueRange* | queryForCompaniesWhoCanHaveEmployees() |
| valueType* | ABCompany |

Advanced properties

| | |
|-----------------|--|
| action | ABCompanyDetailsPage.go((anABContact as ABPerson).Employer) |
| actionAvailable | |
| align | <none selected> |
| available | (anABContact as ABPerson).Employer != null or CurrentLocation.InEditMode |

7.5 Lab Solution: Location user story #2



7.5.1 Write it down

1. Question: What is the name of the destination PCF file? What is the entry point signature?

Name: ABPersonDetailsPage.pcf, Entry point: ABPersonDetailsPage(anABContact : ABContact)

2. Question: What is the name of the source PCF file?

ABContactDetailsCompanyDV.pcf

7.5.2 Configuration

1. Modify the Primary Contact widget's action property in ABContactDetailsCompanyDV.pcf:

```
ABPersonDetailsPage.go((anABContact as ABCompany).PrimaryContact)
```

The screenshot shows the configuration interface for the ABContactDetailsCompanyDV.pcf detail view. The main area displays the page layout with various input fields and sections like "Employee Info" and "Employees". Below the layout, the "Properties" tab is selected, showing the configuration for the "Primary Contact" field. The "Basic properties" section includes fields for id*, value*, and valueRange*. The "Advanced properties" section includes the "action" field which is set to the provided JavaScript code.

| Property | Value |
|----------------------------|---|
| editable | true |
| id* | PrimaryContact |
| label | DisplayKey.get("Training.PrimaryContact") |
| required | |
| value* | (anABContact as ABCompany).PrimaryContact |
| valueRange* | (anABContact as ABCompany).Employees |
| valueType* | ABContact |
| Advanced properties | |
| action | ABPersonDetailsPage.go((anABContact as ABCompany).PrimaryContact) |
| actionAvailable | |
| align | <none selected> |
| available | (anABContact as ABCompany).PrimaryContact != null or CurrentLocation.InEditMode |