

Introduction

Welcome to the Guidewire PolicyCenter 10 Configuration - **Kickstart** course.

The Student Workbook will lead you through the course labs. The lesson numbers correspond to the lesson numbers in your training. Complete the assigned labs to the best of your ability.

Sample Accounts

If the large sample data is loaded in PolicyCenter, it contains the following sample accounts for you to use to complete the exercises. It is recommended that you follow all the labs to create your own new accounts.

Account No.	Type	First Name	Last Name
C000143542	Person	Ray	Newton
B000457766	Person	Erica	Billings
C000456353	Person	Mary	Taylor
C000148456	Person	Bill	Kinman
A000377766	Person	Dave	Worthington
Account No.	Type	Company Name	
C000212105	Company	Wright Construction	
C000478975	Company	Big Lake Bakery	
C000478567	Company	Calloway Cheese Factory	
A000377655	Company	Dominion Logistics	
B000467655	Company	Earth Tech	

Open navigation pane



Tip

Open navigation pane in a PDF file

If you do not see the left navigation pane, you can turn it on. In a PDF file, click the bookmark icon on the left. Or click the Adobe Acrobat menu item **View → Show/Hide → Navigation Panes → Bookmarks**.

Lesson 1 PolicyCenter Data Model

1.1 Requirements

Configure PolicyCenter to meet the following customer requirement from Enigma Fire & Casualty. During the implementation of PolicyCenter, the implementation team for Enigma Fire & Casualty will be working with imported test data. When viewing any account, developers want to know if the account was created by a user or was imported test data. They also want to know quickly if the account is of type company or person.

Account Summary: Ray Newton

Details

Ray Newton

Account No

C000143542

Account Holder

Ray Newton

Home Address

1253 Paloma Ave
Floor 0000
Developer Unit Habitation Cube #0000
Arcadia, CA 91007

Description

Created by the Address Builder with code 0

Test Data

Account Type

Person



Implementation Notes

The PolicyCenter implementation team has provided additional notes:

- All the test data has an Account Number which starts with the characters “A”, “B”, or “C”. Therefore, to determine if an account is a test account or not, evaluate the first character of the Account Number. You can use the `startsWith` string method available on string fields and it has the following syntax:

```
Object.fieldname.startsWith(stringToCheck)
```

- If a piece of logic is used in multiple places, it is better to declare it as a function. Therefore, you should create an enhancement called `isTestData_Ext()` which evaluates if an account has been created from the loaded test data.
- The account type is determined by the account holder’s type. Therefore, you can check the account holder contact’s subtype.

1.2 Configuration



Activity

1. Add an enhancement function to the `Account` entity to check if the account is test data.
2. Add a label and a field to the `Account Summary` detail view, which is displayed at the top of the `Summary` screen when viewing an account.
 - a) Add a label with the following attributes:
 - The label appears below the account description field.
 - The label is `Test Data`.
 - It appears only if the account is a test data account.
 - b) Add a field with the following attributes:
 - It appears below the `Test Date` label.
 - The field is not editable.
 - The label for the field is `Account Type`.
 - It displays the value of the `Account Holder Contact's` type.
 - It always appears.

1.3 Verification

1. Go to the `PolicyCenter` application.
2. Press `ALT + SHIFT + L` to reload the PCF changes.
3. Log in as Alice Applegate.
4. Navigate to an account loaded from the sample data. Verify that the `Test Data` label and the `Account Type` field are displayed.

These accounts typically start with a letter. Account `C000143542` is a sample data account and is person type, while Account `C000212105` is company type. Refer to the section `Introduction / Sample Accounts` for more details.

Account Summary: Ray Newton

Details

Ray Newton

Account No C000143542

Account Holder Ray Newton

Home Address 1253 Paloma Ave
Floor 0000
Developer Unit Habitation Cube #0000
Arcadia, CA 91007

Description Created by the Address Builder with code 0

Test Data

Account Type Person

Account Summary: Wright Construction

Details

Wright Construction

Account No C000212105

Account Holder Wright Construction

Business Address 846 Yount Ln.
Floor 0000
Developer Unit Habitation Cube #0000
Hollywood, CA 91357

Description Created by the Address Builder with code 0

Test Data

Account Type Company

5. Navigate to an account you created previously. Or create a new account using the new account wizard. Choose producer as Archie Armstrong. Fill in the other details.
6. Once the account is available, verify that the Test Data label does not appear, but the account type field appears.

Account Summary: Renee Wells01	
Details	
Renee Wells01	
Account No	1752860144
Account Holder	Renee Wells01
Home Address	601 Stanyan St San Francisco, CA 94101
Description	
Account Type	Person



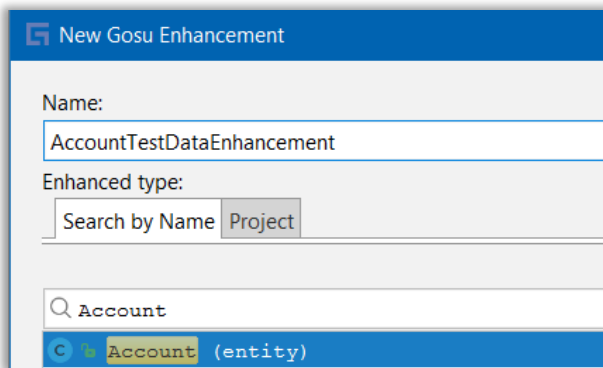
Stop

1.4 Solutions



Solution

1. **Add an enhancement function to the `Account` entity to check if the account is test data.**
 - a) In Studio, go to configuration/gsrc/gw/account.
 - b) Right click on the account package (folder) and select **New → Gosu Enhancement**.
 - c) Create `AccountTestDataEnhancement` that enhances the `Account` entity.



- d) Add a function `isTestData_Ext()` .

```
package gw.account

enhancement AccountTestDataEnhancement : Account {
    function isTestData_Ext(): boolean {
        return this.AccountNumber.startsWith("A") or
               this.AccountNumber.startsWith("B") or
               this.AccountNumber.startsWith("C")
    }
}
```

2. Add a label and a field to the Account Summary detail view.

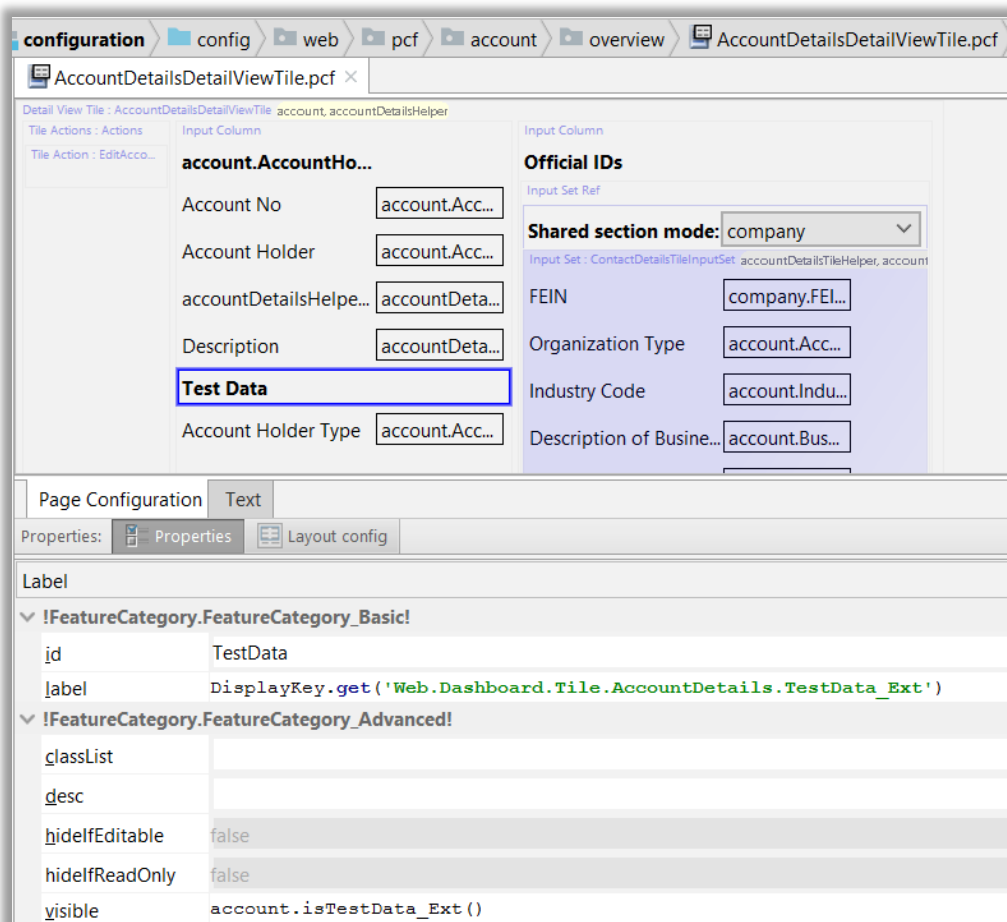
- Press **CTRL + n** to open the file `AccountDetailsDetailViewTile.pcf` under `config/web/pcf/account/overview` .
- Add a new label below the field Description.
- Enter details such as ID, label, visible, etc.

```
Label = DisplayKey.get("Web.Dashboard.Tile.AccountDetails.TestData_Ext")
```

```
Visible = account.isTestData_Ext()
```

- If the display key does not exist, put the mouse cursor on the display key and press **ALT + Enter** to create it.

```
Web.Dashboard.Tile.AccountDetails.TestData_Ext = Test Data
```



- e) Add a Text Input element below the label `Test Data` to display the account holder contact type.

Text Input property:

`value = account.AccountHolderContact.Subtype.DisplayName`

DisplayKey:

`Web.Dashboard.Tile.AccountDetails.AccountType_Ext = Account Type`

configuration > config > web > pcf > account > overview > AccountDetailsDetailViewTile.pcf

AccountDetailsDetailViewTile.pcf x

Detail View Tile : AccountDetailsDetailViewTile account, accountDetailsHelper

Tile Actions : Actions

Tile Action : EditAcco...

Input Column

account.AccountHo...

Account No account.Acc...

Account Holder account.Acc...

accountDetailsHelve... account.Deta...

Description account.Deta...

Test Data

Account Type account.Acc...

Input Column

Official IDs

Input Set Ref

Shared section mode: company

Input Set : ContactDetailsTileInputSet accountDetailsTileHelper, account

FEIN company.FEI...

Organization Type account.Acc...

Industry Code account.Indu...

Description of Busine... account.Bus...

Page Configuration Text

Properties: Properties Layout config Reflection PostOnChange

Text Input

!FeatureCategory.FeatureCategory_Basic!

editable	false
id*	AccountType
label	DisplayKey.get('Web.Dashboard.Tile.AccountDetails.AccountType_Ext')
required	
value*	account.AccountHolderContact.Subtype.DisplayName

3. Go to the PolicyCenter application and press ALT + SHIFT + L to reload the PCF changes.

1.5 References



Review

PolicyCenter Data Model

There are two primary entities in the PolicyCenter data model: *Policy* and *Account*. Including these two entities, there are about 25 major entities in the PolicyCenter data model. These entities can be broken down into five groups. See colored groups below. Each group can be thought of as answering a business question:

- What does each policy period look like? (Charcoal)
- What is covered on the policy? (coverables and coverages) (Burgundy)
- Who holds the policy? (account contacts and locations) (Brown)
- What is the work to be done for the policy? (activities and workflows) (Orange)
- Who is responsible for processing the policy? (the users and groups working for the carrier on the policy) (Blue)