

# 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 this, 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 3 entries, and the 'Notes' section shows 5 entries.

Figure 1 Source

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

Name	Albertson's	Employee Info
Primary Contact	William Andy	Can Have Empl
Address	345 Fir Lane La Canada, CA 91352	Number of Emp
Email Address		<b>Employees</b>
Additional Info		Name
Tax ID	*****	James Anders
Inspection Required?		Samantha And
Preferred Currency		William Andy
		Eric Andy

On the right side, there is a vertical sidebar titled "Contact Insight" containing a list of names: James Anders, Samantha And, William Andy, and Eric Andy.

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". Below the header is a sidebar on the left containing links for "Actions", "Summary", "Details", "Addresses (1)", "Notes (0)", "Social Media", "Analysis", "Interactions", and "History". The main content area is titled "Details" and shows information for a company named "Albertson's". A tab bar at the top of the details section includes "Company Info" (which is selected), "Phone & Addresses", and "Bank Accounts". The "Company Info" section displays fields like 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 fields for Tax ID (\*\*\*\*\*), Inspection Required? (checkbox), and Preferred Currency. To the right of the main content, there is a sidebar titled "Employee Info" which lists "Employees" with names James Anders, Samantha Andy, Eric Andy, and William Andy. There is also a "Contact Insight" section. The overall layout is clean and organized, typical of a CRM application.

Figure 1 Source

The screenshot shows a software interface for managing individual and company information. At the top, there is a header with a logo, the text "TrainingApp", and navigation links "Search" and "Contact". Below the header is a sidebar on the left containing links for "Actions", "Summary", "Details", "Addresses (3)", "Notes (5)", "Social Media", "Analysis", "Interactions", and "History". The main content area is titled "Details" and shows information for a person named "William Andy". A tab bar at the top of the details section includes "Person Info" (which is selected), "Phone & Addresses", and "Bank Accounts". The "Person Info" section displays fields like Name (Full Name: William Andy), Prefix, First Name (William), Middle Name, Last Name (Andy), and Suffix. To the right of the main content, there are three sections: "Employment Info" (Occupation, Employer: Albertson's), "License Info" (Driver's License, State), and "Contact Insights". The overall layout is clean and organized, similar to the company details page.

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 <a href="#">William Andy</a>		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