Editable Detail Views

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Guidewire

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Lesson objectives

- By the end of this lesson, you should be able to:
    - Describe how to make a detail view panel editable
    - Create a toolbar with edit buttons

This lesson uses the notes section for additional explanation and information.
To view the notes in PowerPoint, select View → Normal or View → Notes Page.
When printing notes, select Note Pages and Print hidden slides.

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G U I D E W I R E

Lesson outline

- Discover editability

- Configure the editability of a detail view panel

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G U I D E W I R E

Read-only and edit modes

Read-only	Edit
• Input widgets displays root object data and related data	• Input widgets allow for editing of root object data and related data

Details

Edit

Person Info	Phone & Addresses

Name

Full Name	Robert Smith
Prefix	
First Name	Robert
Middle Name	
Last Name	Smith
Suffix	

Details

Update | Cancel

Person Info	Phone & Addresses

Name

Full Name	Robert Smith
Prefix	<none>
First Name	Robert
Middle Name	
Last Name *	Smith
Suffix	<none>

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G U I D E W I R E

A Page location has two properties that influence if the root object is editable: canEdit and startInEditMode. By default, canEdit is not defined and startInEditMode=false.

A root objects entity definition overrides a PCF element attribute configuration. Some entities are defined as readOnly=true. Read-only entities are not editable using the user interface and page configuration files.

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Editable hierarchy

- By default, all containers are:
  - Editable and visible
  - For widgets to be editable, parent container must also be editable
- Editable hierarchy starts with Location
  - Editable property is undefined

Screen

List Detail Panel

Card View Panel

Detail View Panel

Addresses

Update Cancel

Add Remove Delete Secondary Addresses

	Primary	Address Type	
☐	●	Home	435 Duarte Ave, Arcadia, CA 91006, United
☐	○	Business	345 Fir Lane, La Canada, CA 91352, United

Address Detail

Address Type	Home
Description	Home
Country	United States
Address 1	435 Duarte Ave
Address 2	
Address 3	
City	Arcadia
County	
State	California
ZIP Code	91006

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In the slide example, the Page location is ABContactAddressesPage. The Page PCF element contains an attribute that defines if the page is editable (canEdit=true).

ABContactAddressesPage declares the Screen container and in addition, declares a Panel Ref that references ABContactADdressesLDV, a List Detail Panel. The List Detail Panel declares a reference to the ABContactAddressCV, a Card View Panel. The Card View Panel defines an inline Detail View Panel.

By default, editability of containers is undefined. The hierarchy of containers inherits the editability of the location.

Editable properties of containers
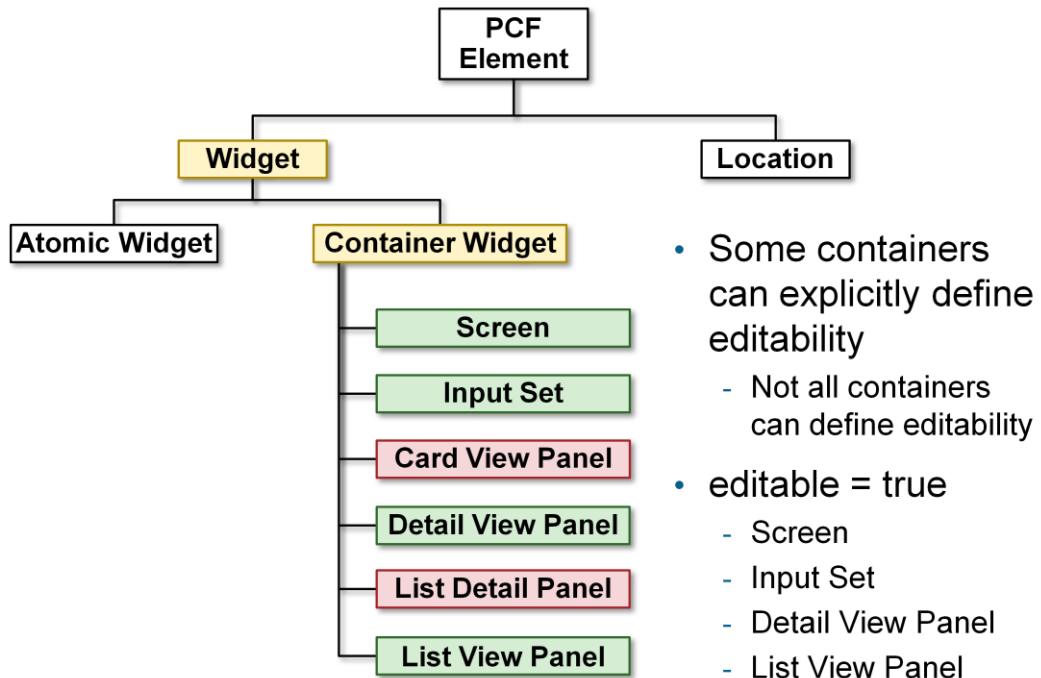
```
                         PCF
                        Element
              ┌───────────────────────┐
            Widget                  Location
    ┌───────────────┐
 Atomic Widget   Container Widget
                    ├── Screen
                    ├── Input Set
                    ├── Card View Panel
                    ├── Detail View Panel
                    ├── List Detail Panel
                    └── List View Panel
```

- Some containers can explicitly define editability
  - Not all containers can define editability
- editable = true
  - Screen
  - Input Set
  - Detail View Panel
  - List View Panel

G U I D E W I R E

Container widgets hold other widgets. Each one can be defined either in its own file or as a child container within some other PCF element file.

Some containers have a configurable "editable" property which is a boolean expression which, if false, makes the container widget and all its children read-only. Screen, Input Set, Detail View Panel and List View Panel have an explicit editable property.

List Detail Panel does not have an explicit property to define editability. A List Detail Panel displays a List View Panel followed by a Card View Panel. A selection in the List View Panel can define the object for the Card View Panel.

A Card View Panel does not have an explicit property to define editability. A Card View Panel is a collection of "Cards", or sub-panels, of which only one card at a time is visible. A set of tabs are shown for switching between cards. Often, a card contains or references a detail view panel.

In most cases, containers inherit editability from a location, such as Page (canEdit = true).

Toolbars

- A **toolbar** is row of data action buttons and other widgets associated with a specific container widget

- Direct placement
    - Screen
    - Panel Ref
    - List View Input

- Referenced containers
    - Card View Panel
    - Detail View Panel
    - List Detail Panel
    - List View Panel

- Input Set not applicable

Summary

| Update | Cancel | Suggest Least Busy User |

Basic Information

Name	William Andy
Public ID	ab:5
Created On	01/13/2014
Assigned User	Edward Lee

History

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Date	Event Type	Description ↑
01/29/2014	Assigned	Assigned user changed from ...
01/30/2014	Assigned	Assigned user changed from ...
01/23/2014	Assigned	Assigned user changed from ...
01/29/2014	Assigned	Assigned user changed from ...
01/29/2014	Assigned	Assigned user changed from S...

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G U I D E W I R E

A toolbar is a row of widgets associated with a container widget that lets the user take action on the data in the container widget.

A toolbar can be directly add to a Screen, Panel Ref, or List View Input. Toolbars can also be associated with Detail View Panels, Card View Panels, List Detail Panels, and List View Panels. However, there is no direct placement or reference with an Input Set. Typically, an Input Set is referenced or placed in an Input Column in a Detail View Panel.

A toolbar has usually has button widgets such as Edit Buttons. When a toolbar is associated with a list view panel, the toolbar may not have any button widgets. In this specific case, the toolbar association may be required to provide button paging controls. Paging button controls allow users to view the list view rows in sizable chunks and "page" through the results. A user can move to the first, last, previous and next page. A user can also specify a specific page number to view.

Toolbar placement: Screen

- A **Screen** is the top-level user interface container for the visible content of a page
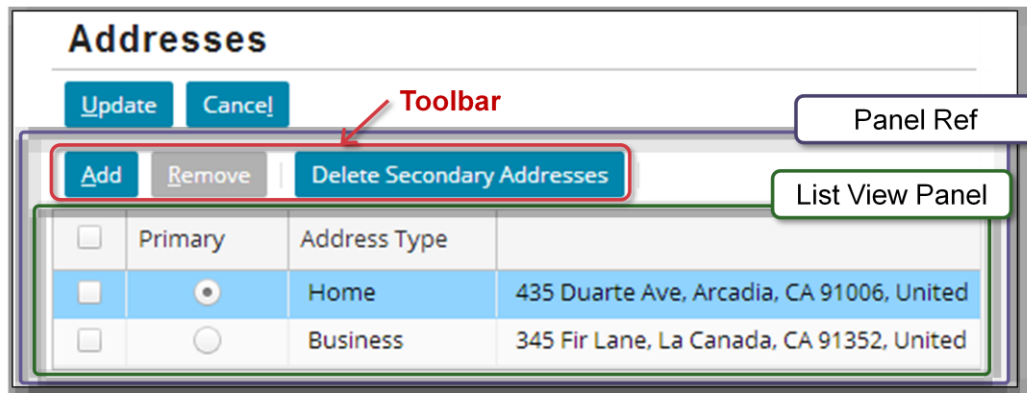- By placing a toolbar in a screen, you can add Edit Buttons

There are three places that you can place a toolbar: Screen, Panel Ref, and List View Input.

A Screen is the top-level container widget for the visible content of a page. By placing a toolbar in a screen, you can add edit buttons. When in edit mode, all the input widgets contained within a Screen become editable unless otherwise specified (in a parent container or widget itself) to not be editable.

Toolbar placement: Panel Ref

Addresses

[Update] [Cancel]   **Toolbar**

Panel Ref

[Add] [Remove] **Delete Secondary Addresses**

List View Panel

	Primary	Address Type	
☐	⦿	Home	435 Duarte Ave, Arcadia, CA 91006, United
☐	◯	Business	345 Fir Lane, La Canada, CA 91352, United

- A **Panel Ref** includes a reference to a panel container
  - Card View Panel, Detail View Panel, List Detail Panel, List View Panel, or Panel Set
- Optionally supplies referenced panel with
  - Title, Toolbar, Instructional text

G U I D E W I R E

There are three places that you can place a toolbar: Screen, Panel Ref, and List View Input.

A Panel Ref requires a reference to a panel such as a Detail View Panel, List View Panel, Panel Set or Card View Panel. A Panel Ref supplies the referenced panel with title, toolbar or instructional text.

Toolbar placement: List View Input

Employee Info

Can Have Employees?   Yes
Number of Employees   8
Employees

List View Input

« ‹ | Page 1 of 2 | › »   ← **Toolbar**

List View Panel

Name	Job Title	Email Address
William Dan	Accountant	William.Dan@albertsons
Adam Hinds	Cashier	Adam.Hinds@albertsons
Mary Leflore	General Manager	Mary.Leflore@albertsons

- A **List View Input** references a List View Panel and supplies it with an optional toolbar
- If applicable, a toolbar automatically applies paging

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There are three places that you can place a toolbar: Screen, Panel Ref, and List View Input.

A ListViewInput element references a List View Panel and supplies it with an optional toolbar. Configuring List View Panels is covered later in this course. In the slide example, the page is in read-only mode. The toolbar automatically adds paging of the list in both read-only and edit modes.

Edit Buttons

- The **Edit Buttons** widget is a pre-defined set of editing controls for a toolbar

- Read-only shows Edit

- Edit mode shows Update | Cancel

G U I D E W I R E

Edit, Update, Cancel

Edit	Update	Cancel
Edit	**Update**	**Cancel**
• Enter edit mode	• Commit changes	• Discard changes
• Add entry to unsaved menu	• Return to read-only	• Return to read-only mode
	• Remove entry from unsaved menu	• Remove entry from unsaved menu

G U I D E W I R E

Edit buttons and the unsaved work menu

- Click Edit to automatically add object to unsaved work menu

- Update or Cancel removes entry
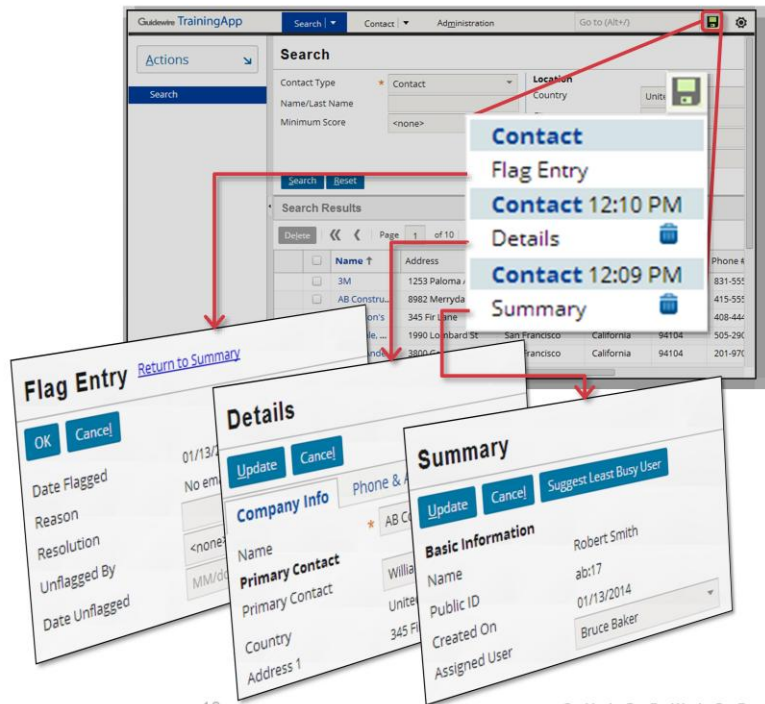
Whenever you start editing a data backed object (entity), the Guidewire application automatically adds an entry to the Unsaved Work menu. The entry remains in the Unsaved Work menu until the data is committed (click update) or you log off.

Users can use the Unsaved Work menu to return to unsaved work, even after they navigate away from the current screen.

Lesson outline

- Discover editability

- Configure the editability of a detail view panel

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Anatomy of an editable detail view panel

- Screen
- Toolbar
- Edit Buttons
- Panel Ref
- Referenced detail view panel
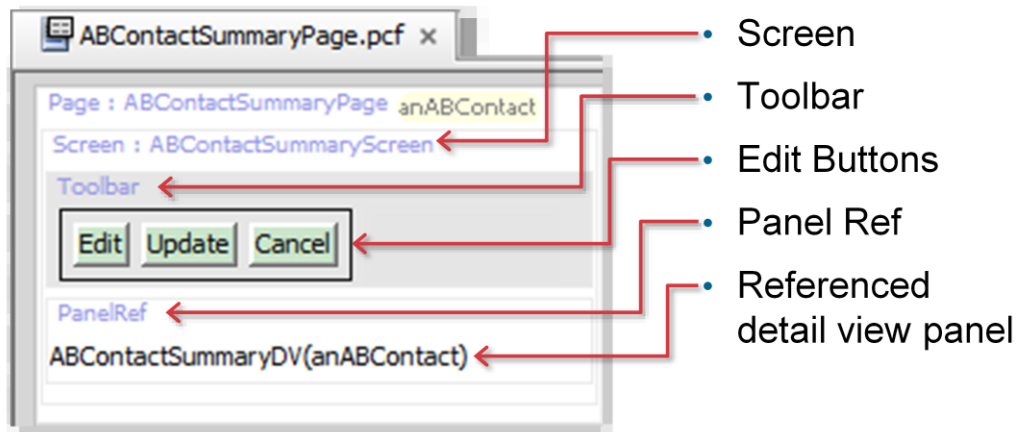
- Screen is top level container with Toolbar and Edit Buttons
- Panel Ref is a child of Screen and references a Detail View Panel
 - Possible to use inline Detail View Panel instead of Panel Ref

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G U I D E W I R E

In the slide example, editability is set on the Page location in the canEdit property. The ABContactSummaryPage uses a PanelRef element to reference the ABContactSummaryDV detail view panel.

Steps to add edit buttons

1. Locate top-level screen container

2. Add toolbar to screen

3. Add edit buttons to toolbar

4. Deploy PCFs

G U I D E W I R E

Step 1: Locate top-level screen container
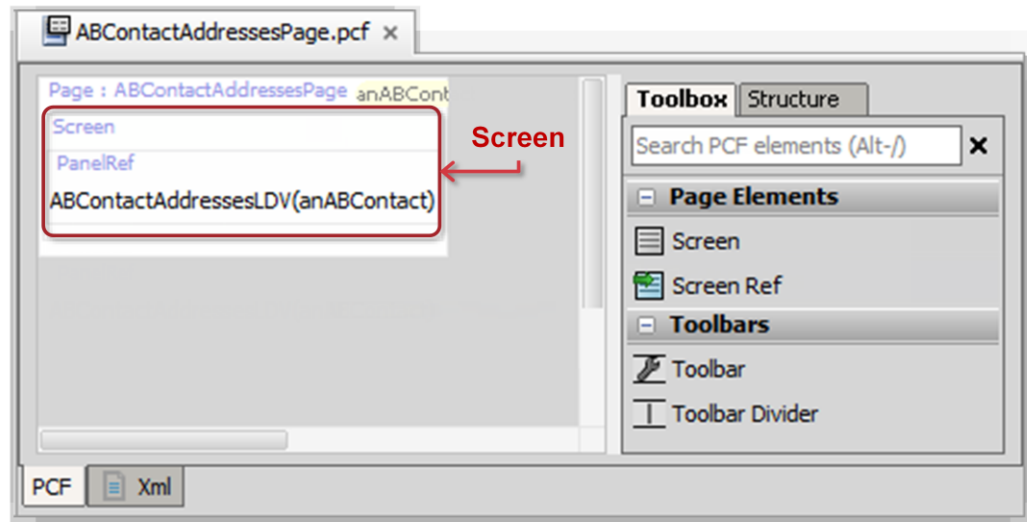
- Screen is a top-level container and is found in a location

G U I D E W I R E

Step 2: Add toolbar to screen
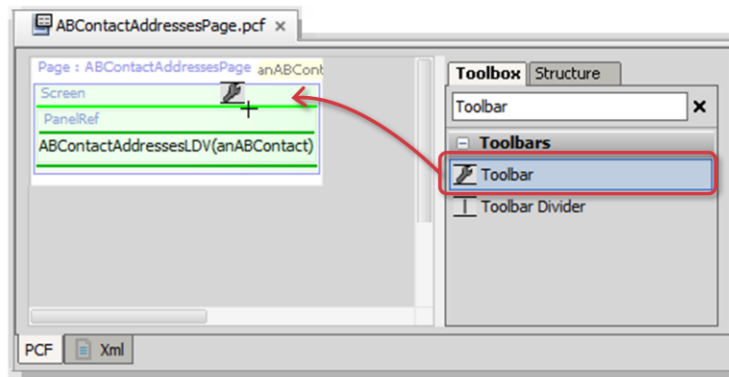
- Light green line - current place where new widget will go

- Dark green line - places where new widget can go

- Add a Toolbar to the top-level Screen element

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Step 3: Add edit buttons to toolbar

ABContactAddressesPage.pcf ×

Page : ABContactAddressesPage anABContact

Screen

Toolbar

PanelRef
ABContactAddressesLDV(anABContact)

PCF | Xml

Toolbox | Structure

Edit Buttons ☒

⊟ **Toolbars**
  ⊟ **Toolbar Buttons**
    Edit Buttons

• Add the Edit Buttons to the toolbar

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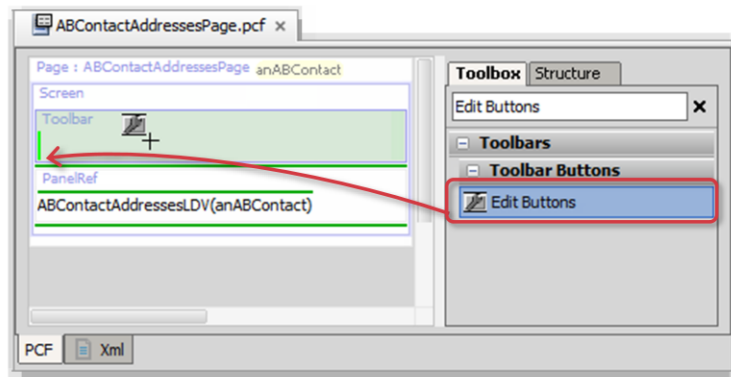
For edit buttons, it is ideal to add the toolbar to the top-level container and then add the edit buttons to the toolbar.

Toolbar with edit buttons
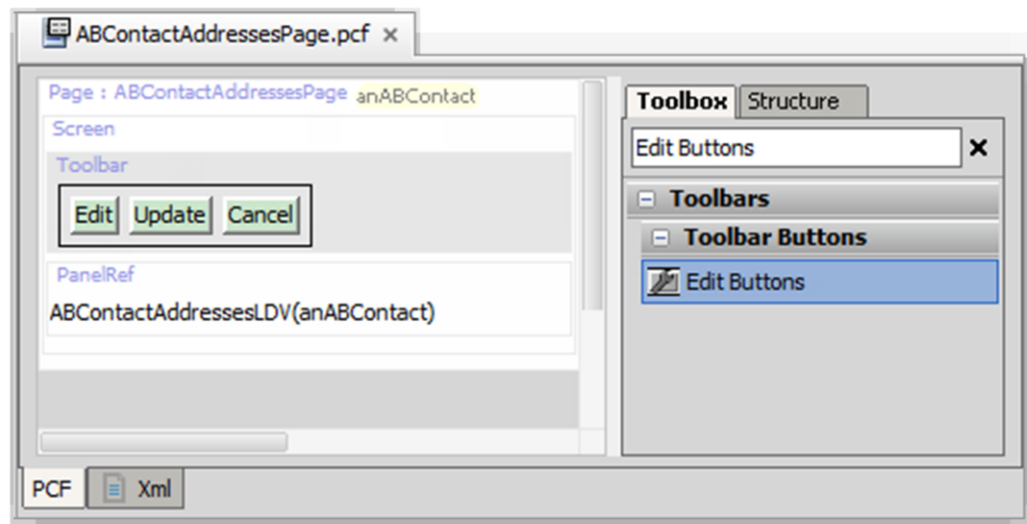
- EditButtons widget includes Edit|Update|Cancel buttons
  - Edit shows in read-only mode
  - Update and Cancel show in edit mode

G U I D E W I R E

Step 4: Deploy PCFs

Restart Server

- PCFs read at server startup

Page PCF
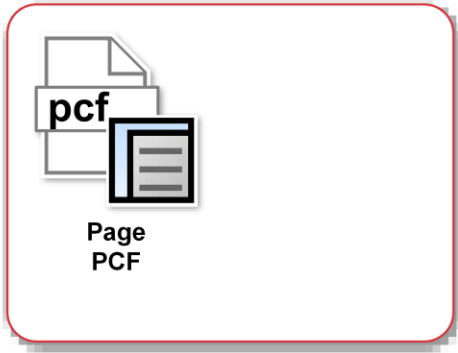
Reload PCFs

- ALT+SHIFT+L
  - Internal debug tools enabled
- Internal Tools
  - Reload → Reload PCF Files
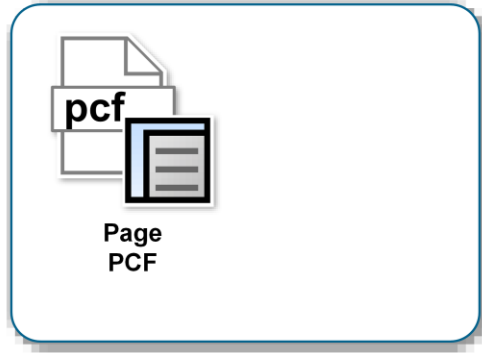
Page PCF

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It is also possible to reload PCF files using the Guidewire API and/or internal server tools. The Reload PCF command can be found on the Reload page in Internal Tools. To access Internal Tools, you must log in as an administrator user, e.g., su/gw. Then, use ALT+SHIFT+T. In the tab bar, select Internal Tools → Reload. On the Reload page, click the Reload PCF Files button. The Reload PCF Files button calls the static method gw.api.tools.InternalToolsUtil.reloadPCFs().

Lesson objectives review

- You should now be able to:
    - Describe how to make a detail view panel editable
    - Create a toolbar with edit buttons

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Review questions

1. A screen with card view panel references a detail view panel. The detail view panel contains a text input widget. To allow the user to edit the text input value, what must be set to editable?

2. In Studio, can you add Edit Buttons directly to
   a) An inline DetailViewPanel widget?
   b) A detail view panel PCF file?

3. Where do you typically add a toolbar with edit buttons?

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Answers

1) The input widget and all of the containers that directly or indirectly contain it must be editable. The editable hierarchy begins with a location PCF Element. Assuming that the Screen declared in a Page location, then the Page location must be editable.

2a) No, you cannot add Edit Buttons directly to a DetailViewPanel widget. Typically, you add a Toolbar to a Screen. Then you add Edit Buttons to the Toolbar. A DetailViewPanel widget can be declared on a Screen.

2b) No, you cannot add Edit Buttons directly to a Detail View Panel PCF file. Typically, you add a Toolbar to a Screen. Then you add Edit Buttons to the Toolbar. A Panel Ref can reference the Detail View Panel PCF file.

3) You add a toolbar with edit buttons typically to the Screen container element.

Notices

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