Guidewire PolicyCenter®

PolicyCenter Product Designer Guide

RELEASE 8.0.4

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Product Name: Guidewire PolicyCenter
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About PolicyCenter Documentation

The following table lists the documents in PolicyCenter documentation.

Document	Purpose
InsuranceSuite Guide	If you are new to Guidewire InsuranceSuite applications, read the *InsuranceSuite Guide* for information on the architecture of Guidewire InsuranceSuite and application integrations. The intended readers are everyone who works with Guidewire applications.
Application Guide	If you are new to PolicyCenter or want to understand a feature, read the *Application Guide*. This guide describes features from a business perspective and provides links to other books as needed. The intended readers are everyone who works with PolicyCenter.
Upgrade Guide	Describes how to upgrade PolicyCenter from a previous major version. The intended readers are system administrators and implementation engineers who must merge base application changes into existing PolicyCenter application extensions and integrations.
New and Changed Guide	Describes new features and changes from prior PolicyCenter versions. Intended readers are business users and system administrators who want an overview of new features and changes to features. Consult the “Release Notes Archive” part of this document for changes in prior maintenance releases.
Installation Guide	Describes how to install PolicyCenter. The intended readers are everyone who installs the application for development or for production.
System Administration Guide	Describes how to manage a PolicyCenter system. The intended readers are system administrators responsible for managing security, backups, logging, importing user data, or application monitoring.
Configuration Guide	The primary reference for configuring initial implementation, data model extensions, and user interface (PCF) files. The intended readers are all IT staff and configuration engineers.
Globalization Guide	Describes how to configure PolicyCenter for a global environment. Covers globalization topics such as global regions, languages, date and number formats, names, currencies, addresses, and phone numbers. The intended readers are configuration engineers who localize PolicyCenter.
Rules Guide	Describes business rule methodology and the rule sets in PolicyCenter Studio. The intended readers are business analysts who define business processes, as well as programmers who write business rules in Gosu.
Contact Management Guide	Describes how to configure Guidewire InsuranceSuite applications to integrate with ContactManager and how to manage client and vendor contacts in a single system of record. The intended readers are PolicyCenter implementation engineers and ContactManager administrators.
Best Practices Guide	A reference of recommended design patterns for data model extensions, user interface, business rules, and Gosu programming. The intended readers are configuration engineers.
Integration Guide	Describes the integration architecture, concepts, and procedures for integrating PolicyCenter with external systems and extending application behavior with custom programming code. The intended readers are system architects and the integration programmers who write web services code or plugin code in Gosu or Java.
Gosu Reference Guide	Describes the Gosu programming language. The intended readers are anyone who uses the Gosu language, including for rules and PCF configuration.
Glossary	Defines industry terminology and technical terms in Guidewire documentation. The intended readers are everyone who works with Guidewire applications.

Document	Purpose
Product Model Guide	Describes the PolicyCenter product model. The intended readers are business analysts and implementation engineers who use PolicyCenter or Product Designer. To customize the product model, see the *Product Designer Guide*.
Product Designer Guide	Describes how to use Product Designer to configure lines of business. The intended readers are business analysts and implementation engineers who customize the product model and design new lines of business.

Conventions in This Document

Text style	Meaning	Examples
italic	Emphasis, special terminology, or a book title.	A *destination* sends messages to an external system.
bold	Strong emphasis within standard text or table text.	You **must** define this property.
narrow bold	The name of a user interface element, such as a button name, a menu item name, or a tab name.	Next, click **Submit**.
`monospaced`	Literal text that you can type into code, computer output, class names, URLs, code examples, parameter names, string literals, and other objects that might appear in programming code. In code blocks, bold formatting highlights relevant sections to notice or to configure.	Get the field from the `Address` object.
`monospaced italic`	Parameter names or other variable placeholder text within URLs or other code snippets.	Use `getName(`*`first`*`, `*`last`*`)`. `http://`*`SERVERNAME`*`/a.html`.

Support

For assistance, visit the Guidewire Resource Portal – `http://guidewire.custhelp.com`

chapter 1

Introduction to Product Designer

Product Designer is a web-based tool for examining and editing the PolicyCenter product model. You use Product Designer from your web browser to edit PolicyCenter configuration files belonging to a development instance of PolicyCenter.

Introduction to the Product Model

The PolicyCenter product model is central to configuring a line of business. The product model defines the products that carriers offer through PolicyCenter. PolicyCenter stores product definitions as patterns and then uses the patterns during the submission process to generate instances of policies or the subcomponents of policies.

Think of the product model as a product configurator. It provides you with the means to create insurance products that meet the precise needs of your organization, your market, and your customers. The product model enables you to define a product, select a policy line, and offer specific coverages each with specific coverage terms. The product model defines the coverables that each product can cover. For example, an auto policy provides collision and uninsured motorist property damage coverages. A property policy provides fire, contents, and liability coverages.

Lines of Business in the Base Application

The PolicyCenter base application contains reference implementations of several lines of business that you can use to accelerate your own implementation. Each line of business includes reference implementations for jobs, policy file screens, and rating rules, and in some cases, forms and forms inference logic. Some lines also include rules to determine eligibility.

PolicyCenter includes reference implementations of the following lines of business:

- Businessowners
- Commercial Auto
- Commercial Package
- Commercial Property
- General Liability

- Inland Marine
- Personal Auto
- Workers' Compensation

Note: As supplied, the reference implementations of these lines do not constitute compliance systems. Guidewire designed the product model so that you can enhance and expand your implementation through configuration as needed. PolicyCenter can accommodate multiple classifications and many coverages and exclusions per jurisdiction. The reference implementations contain a sample set of these classifications, coverages, and exclusions.

In PolicyCenter, each policy line is a member of at least one product. A *product* is a collection of one or more policy lines. PolicyCenter includes products corresponding to each policy line, plus a Commercial Package Policy product that includes commercial property, inland marine, and general liability.

Product Designer Overview

Product Designer enables you to edit those parts of the product model that do not require creating complex data objects or complex programming. The backing data model, code, and PCF pages required to support a line of business must be created by a developer using Guidewire Studio.

Using Product Designer, you can:

- Add new products based on product types that have been defined in Studio.
- Add new policy line patterns based on policy line types that have been defined in Studio.
- Define new coverage categories and coverages, exclusions, and conditions within a policy line, including coverage terms, reinsurance coverage groups, and availability.
- Configure modifiers, including rate factors, state minimums and maximums, and availability.
- Define question sets and questions to assess risk and gather applicant information.
- Define offerings that include or exclude policy lines, coverages, coverage terms, coverage term packages, conditions, exclusions, modifiers, and question sets.
- Configure audit schedules for policy lines that support pre-configured and customer-configured audit types. The pre-configured audit types are Checking Audit, Final Audit and Premium Report.
- Examine and edit system tables that support the business logic of your lines of business.

chapter 2

Installing Product Designer

Product Designer can run in two distinct ways:

- As a single-user, standalone instance, typically on the same computer as the PolicyCenter development server.
- As a multi-user, shared instance, typically on a dedicated computer.

In both cases, Product Designer runs in an application server that enables users to perform all operations within a web browser.

Running Product Designer over SSL

It is possible to run Product Designer over SSL in both a single-user instance and a multiple-user instance. See “Using SSL with PolicyCenter” on page 91 in the *System Administration Guide*. We also recommend that you configure your operating system’s firewall to prevent external access to the local Product Designer server.

Running a Single-user Instance of Product Designer

Developers and integration architects typically run Product Designer and Guidewire Studio side-by-side on a single computer that also has a development instance of PolicyCenter. In this scenario, you can simultaneously run both Studio and Product Designer to perform all of the tasks needed to define a line of business.

To run a single-user instance of Product Designer on the same computer as your PolicyCenter development instance, no installation is needed. Product Designer is packaged with the PolicyCenter distribution image and can be run immediately after installing PolicyCenter.

To run a single-user instance of Product Designer with default settings

1. Navigate to the `productdesigner/bin` directory of your PolicyCenter development instance.
2. Run `launchPD.bat`.

3. Wait while the built-in application server starts in a command window. You must keep this command window open while using Product Designer. Closing the window stops the application server. After the startup script starts the built-in application server, Product Designer opens in your default web browser and displays the **Login** page.
4. Enter your user name and password, and then click **Log In** to display the Product Designer home page. Guidewire provides a default administrative user named `su` with the default password `gwgw`. Use this account initially to access Product Designer.

   Guidewire recommends for security reasons that you create a new administrative user and delete the default user. To add and remove users, and designate users as administrators, see “Managing Users” on page 28.

   Note: Your Product Designer session automatically terminates after 120 minutes of inactivity. This timeout is not configurable when Product Designer is running as a single-user standalone instance. However, because Product Designer continually maintains all of your changes in the active change list until you commit them, after logging in again, none of your work is lost.

Startup Options

When running in single-user mode, the following parameters can be used in the startup script, `launchPD` or `launchPD.bat`:

Parameter	Description
`-port=`*`nnnn`*	TCP port number to assign to the built-in application server. Default: `8780`.
`-openPageInWebBrowser`	Automatically starts your default web browser and opens the Log In page of Product Designer after startup completes. Remove this parameter if you do not want your web browser to start up automatically.

Installing a Multi-user Instance of Product Designer

In organizations where business analysts work side-by-side with developers, Product Designer can be deployed on a separate application server and used by multiple people at the same time. Each user makes changes in a private change list, and then submits all changes in the change list at one time. Product Designer warns of conflicts in cases where different users make changes to the same items at the same time.

IMPORTANT For security reasons we recommend using HTTPS for multi-user Product Designer installations.

To install a multi-user instance of Product Designer

1. From an instance of PolicyCenter, obtain the `productdesigner.war` file from the `productdesigner/war` directory.
2. Deploy `productdesigner.war` to your production web server. Configure the port on which it runs as needed.
3. Start the Product Designer web application.
4. Start a web browser and navigate to the Product Designer web address. The web address is configured when you deploy `productdesigner.war`.
5. Enter an administrative user name and password, then click **Log In** to display the Product Designer home page. Guidewire provides a default administrative user named `su` with the default password `gwgw`. Use this account to initially access Product Designer.

6. Define one or more workspaces. A *workspace* is a name reference to the root folder of a PolicyCenter instance. Users select a workspace when creating a change list to identify the PolicyCenter instance to which their changes are to be committed.
7. Create administrative and non-administrative users as needed.
8. Configure version control integration as needed.

See also

- "Managing Workspaces" on page 25 for information about adding new workspaces and specifying workspace settings, including version control integration.
- "Managing Users" on page 28 for information about adding users, setting user names and passwords, and assigning change lists to users.
- "Managing Change Lists" on page 30 for information about adding new change lists and assigning them to users.

chapter 3

Using Product Designer

The following topics explain the basics of how to use Product Designer.

This topic includes:

These topics provide general usage information only—they do not explain how to use Product Designer to perform specific tasks such as editing the PolicyCenter product model.

Starting Product Designer

You can run Product Designer on your own computer in a single-user configuration, or your administrator can deploy it on a server in a multiuser configuration.

Starting Product Designer in a Single-user Configuration

If you are running Product Designer on your own computer in a single-user configuration, you must start it before accessing it from a web browser.

To run a single-user instance of Product Designer with default settings

1. Navigate to the `productdesigner/bin` directory of your PolicyCenter development instance.
2. Run `launchPD.bat`.

3. Wait while the built-in application server starts in a command window. You must keep this command window open while using Product Designer. Closing the window stops the application server. After the startup script starts the built-in application server, Product Designer opens in your default web browser and displays the **Login** page.
4. Enter your user name and password, and then click **Log In** to display the Product Designer home page. Guidewire provides a default administrative user named `su` with the default password `gwgw`. Use this account initially to access Product Designer.

   Guidewire recommends for security reasons that you create a new administrative user and delete the default user. To add and remove users, and designate users as administrators, see “Managing Users” on page 28.

   Note: Your Product Designer session automatically terminates after 120 minutes of inactivity. This timeout is not configurable when Product Designer is running as a single-user standalone instance. However, because Product Designer continually maintains all of your changes in the active change list until you commit them, after logging in again, none of your work is lost.

Starting Product Designer in a Multiuser Configuration

If you are accessing a shared, multiuser installation of Product Designer, your administrator starts Product Designer and generally keeps it running at all times.

To use Product Designer in a Multiuser configuration

1. Open your web browser and go to the Product Designer URL (web address).
2. Enter your user name and password, and then click **Log In** to display the Product Designer home page.

Contact your system administrator for the URL of your Product Designer server and to obtain a user name and password. Consider creating a shortcut or bookmark in your web browser to simplify access Product Designer.

Note: You can change your user name and password at any time. For instructions, see “User Settings” on page 17.

Account Lockout in Product Designer

If you enter the incorrect user name or password three times in succession, your account is locked for three minutes. You must wait until the lockout period has elapsed before you attempt to log in again.

Multiple Sessions in Product Designer

If you have an existing session in Product Designer and then attempt to log in with the same user name in a different browser instance, your existing session is disconnected.

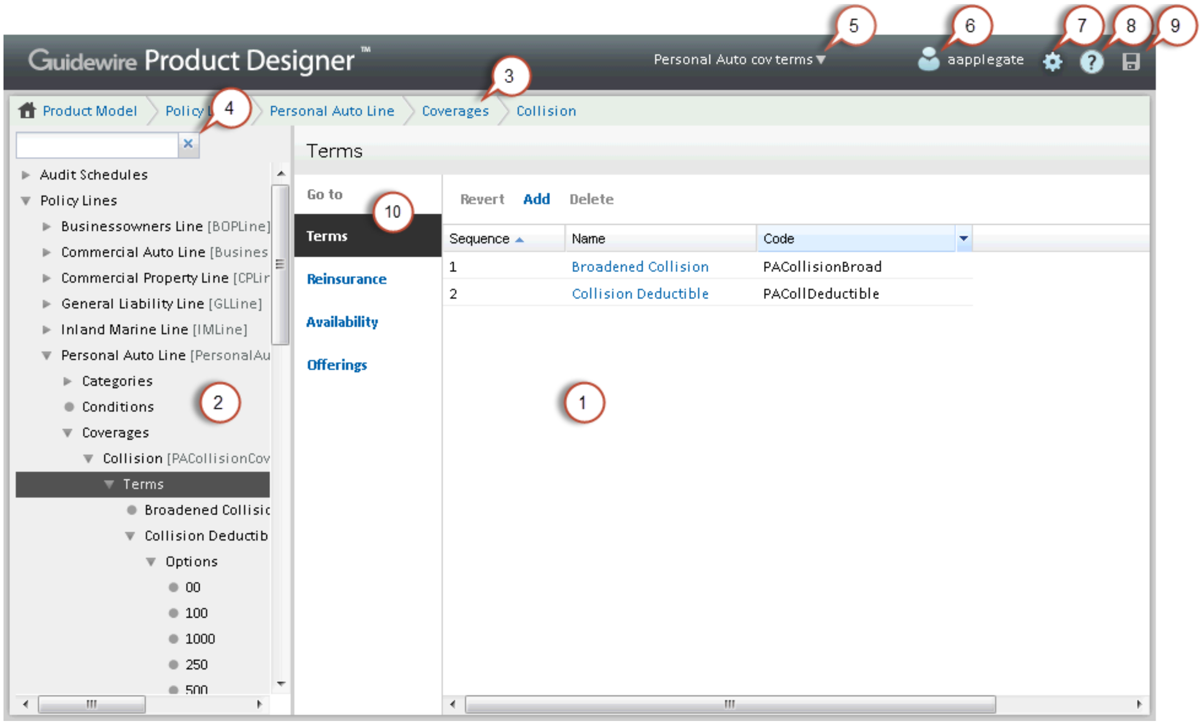
It is possible to maintain multiple Product Designer sessions in the same browser instance. However in this case conflicts could occur if you commit changes in multiple browser tabs. We recommend that you use only one of the tabs for committing changes (edit-only), and use the other tabs for viewing changes (read-only).

Navigating in Product Designer

The following topics explain basic navigation in Product Designer.

Basic Navigation

Every Product Designer page has a common set of navigation elements. Some pages have additional controls that are described elsewhere.



Key	Description
1	Typical Product Designer page, in this case, the **Terms** page.
2	Navigation panel showing expanded section of navigation tree with the **Terms** branch selected. Use the up and down arrow keys on the keyboard to scroll through the nodes in the Product Model. The corresponding page appears as you press the up and down arrow keys. Node with hidden descendants. Press the right arrow key on the keyboard to expand the node and reveal its descendants. Press the right arrow key again to reveal the page of the first descendant node. Expanded node. Press the up or down arrow key on the keyboard to scroll through the list of descendants. The corresponding page appears as you scroll through the list. Press the left arrow on the keyboard to collapse the node and hide its descendants. Node with no descendants. Press the left arrow key on the keyboard to move up to the closest expanded node. Product Designer remembers the collapsed or expanded state for each subsection on a page. For example, if you expand the **Advanced** subsection on a policy lines page, then that subsection appears expanded on any other page on which it appears. These settings are stored per user, and are retained even if you log out of Product Designer.
3	Breadcrumbs showing hierarchy of objects leading to the current page. Click the rightmost breadcrumb link to view the parent page. Click any breadcrumb link to jump directly to the indicated page.
4	Filter box. Type the first characters of a node name. As you type, the filter hides every node in the tree except the nodes whose names or codes begin with the characters you typed. The code is the portion at the end of the label enclosed in square brackets. Note that the filtered tree also shows the parent nodes of each matching item, to help identify its location in the product model. Click the adjacent **X** to clear the filter and restore all nodes to the tree. **Note**: If you filter the tree and then add or duplicate a Product Model item, the filter text is removed and the new item is highlighted in the product model.

Key	Description
5	Active change list and change list menu. Displays the name of the active change list. An adjacent down arrow ▼ indicates that multiple change lists are available. Click the drop-down list to select a different change list. The selected change list becomes the active change list. If no arrow appears, the active change list is the only change list assigned to you.
6	**User Tools**. Click to display the User menu, described in "User Menu" on page 16.
7	**Options**. Click to display the Options menu, described in "Options Menu" on page 16. Contents depend on whether the user is an administrator.
8	**Help**. Click to open the help panel, which contains information about the current page.
9	**Changes**. Indicates whether changes have been made to any objects and whether those changes have validation errors by changing as follows: – You have not made any changes. – You have made changes. Click the icon to open the **Changes** panel to view your changes. Expand the **Changes** panel to view the **Changes** page where you can commit or revert your changes. – You have made changes but there are validation errors. Click the icon to open the **Changes** panel to view the changes and the errors.
10	**Go to** links. For convenience, click to navigate directly to the associated page. Some of the links under **Go to** are also available in the navigation tree.

User Menu

User Settings	Displays the **User Settings** page where you can change your user name, password, full name, user interface language, and regional formats.
My Changelists	Displays the **My Changelists** page where you can add and delete change lists, see which of your change lists is active, and reassign change lists to other users.
Log Out	Logs you out of Product Designer and displays the login screen.

Options Menu

Users	Available only to administrators. Displays the **Users** page where you can add, edit, and delete users and designate users as administrators.
Changelists	Available only to administrators. Displays the **Changelists** page where you can add and delete changelists and assign changelists to users.
Workspaces	Available only to administrators. Displays the **Workspaces** page where you can add and delete workspaces.
Synchronize Product Model	Behavior depends on system configuration. • Administrator has configured a PolicyCenter user name and password – Immediately deploys all committed product model changes • Administrator has not configured a PolicyCenter user name and password – Opens the **Synchronize Product Model** dialog box. Enter the user name and password of a PolicyCenter user who belongs to a role with `soapadmin` permissions, and then click **OK**. Product Designer then deploys all committed product model changes. Product Designer deploys to the Test Server all committed product model changes from all users that correspond to the workspace associated with your active change list. **Note** The Test Server is configured by an administrator when the workspace is defined, and can be different from the PolicyCenter instance to which you commit your change lists.

Synchronize System Tables	Behavior depends on system configuration. • Administrator has configured a PolicyCenter user name and password – Immediately deploys all committed system table changes • Administrator has not configured a PolicyCenter user name and password – Opens the **Synchronize Product Model** dialog box. Enter the user name and password of a PolicyCenter user who belongs to a role with `soapadmin` permissions, and then click **OK**. Product Designer then deploys all committed system table changes. Product Designer deploys to the Test Server all committed system table changes from all users that correspond to the workspace associated with your active change list. **Note** The Test Server is configured by an administrator when the workspace is defined, and can be different from the PolicyCenter instance to which you commit your change lists.
About Product Designer	Displays the **About Product Designer** dialog box, which includes the Product Designer version number.

Avoid Synchronizing the Product Model While a Submission is in Progress

PolicyCenter throws a `ClassCastException` and stops responding if you synchronize the product model from Product Designer while a submission policy transaction is in progress. To recover from this state, you must restart the PolicyCenter server.

To avoid this exception, do not synchronize the product model while a submission is in progress. Instead, navigate to a screen outside any policy transaction, such as the **Account Summary** screen, before synchronizing the product model.

Alternatively, enable internal debug tools by setting `EnableInternalDebugTools` to `true` in `config.xml`. Then after synchronizing the product model and prior to performing any operation in PolicyCenter, press `Alt+Shift+L` to reload PCF files.

User Settings

In the User menu, click **User Settings** to display the **User Settings** page.

User Settings Page

Manage your user settings using the following fields:

User Name	Name to use when logging in to Product Designer. You can change your own user name at any time.
Full Name	Your full name appears when managing change lists and in certain administrative tasks.
Language	User interface language and locate to use.
Regional Formats	Regional formats to apply to numbers, dates, and currency values.

Other operations

- **Close the page** – Click **Close**. All changes are saved as you make them, so there is no save command.

To change your password

1. Click **Change Password**.
2. In the **Change Password** dialog box, enter your current password, then enter a new password. Pay attention to the password requirements stated in the dialog box.
3. Re-enter the new password, then click **OK**.

Working with Change Lists

Before you can make any changes in Product Designer, you must create a *change list*. A change list is a named collection of changes that are held in Product Designer until you decide either to commit or revert the changes. Committing your changes means copying them to the application's configuration files on the PolicyCenter server. Because your changes are in a change list, you can safely make changes and then later choose to commit or not commit some or all of those changes.

You can create multiple change lists, and then select the active change list from among them. The active change list is the one you are using now. All changes you make become part of the active change list. Using multiple change lists enables you to group your changes into separate sets and independently commit each change list at the appropriate time. Unless you assign it to another user, each change list and the changes it contains belong to you. Other users have their own change lists. A change list remains under your control unless you reassign it to another Product Designer user.

> **Note:** If you have multiple change lists, the changes in each of your change lists are completely separate from one another. Until you commit them, the changes you make in one change list do not appear in your other change lists. Therefore, if you create a new change list, its state matches the state of the PolicyCenter instance as of the previous commit operation.

Assigning a change list to another user enables them to review your changes and perhaps make additional changes. They could then assign the change list back to you, enabling you to review their changes. When everyone is satisfied with the changes, you can commit them.

The name of the active change list appears in the toolbar to the left of the User menu. If you have multiple change lists, click the adjacent selector to make a different change list active.

Click **Changes** to open the **Changes** panel and see your the changes in the active change list. The appearance of the **Changes** icon changes to indicate status, as follows:

	You have not made any changes.
	You have made changes. Use the **Changes** page to update or revert your changes.
	You have made changes, but there are errors. Use the **Changes** panel to locate the errors.

Validating Your Changes

Product Designer validates changes as you move from one page to another. It indicates whether there are validation errors by displaying a red on the **Changes** icon in the toolbar.

Additionally, when you are viewing any page that enables you to make changes to the product model or system tables, you can click **Validate** to manually validate your changes. Validation errors appear at the top of the page on a red background. The errors are marked with and appear on a red background. When no validation errors exist, clicking **Validate** displays the message **No validation errors** marked with ✓ on a green background.

> **Note:** When you click **Validate**, Product Designer reloads the entire product model from the workspace. Therefore, Product Designer can display unexpected values after validation if other users have committed changes to the same workspace.

Finally, when you select **Commit**, Product Designer performs validation of all changes in your active change list and proceeds only if it does not detect any validation errors. Your commit operation is blocked until you resolve all errors in the change list.

Committing Your Changes

When you use Product Designer to make changes to the product model, those changes reside only in your change list. You must commit your changes before they become part of the associated PolicyCenter configuration.

If another user has committed changes to the same field from a different change list, then Product Designer detects the conflict when you attempt to commit your changes. You can then decide how you want to handle the conflict.

To view the changes page

1. Click **Changes** to open the **Changes** panel.
2. Click **Show Full Panel** to expand the **Changes** page

Column	Description
Location	Location of the changed object. Click this name to jump to the object so that you can examine the change.
Context	Description or type of changed object.
Change	Type of change, for example, **edited**, **added**, **duplicated**, or **deleted**.
When	Date and time of the change.
Revert	Click **Revert** to revert the single change described in this row. Reverting a change removes it from the change list. **Note:** When you click **Revert**, Product Designer reloads the entire product model from the workspace. Therefore, Product Designer can display unexpected values after reverting if other users have committed changes to the same workspace.

To commit all changes

Click **Commit All**. If Product Designer detects validation errors, it displays them at the top of the page. All validation errors must be corrected before you can commit your changes. If there are no validation errors, Product Designer attempts to commit your changes.

If another user has committed changes to the same field or fields from a different change list, Product Designer detects the conflict and displays error messages. Click the location in the error message to view the conflict. Product Designer displays a conflict icon beside each affected field. Click the icon to view the **Resolve Conflicts** dialog box.

To use your own value for a field, click **Use** beside the **Your Value** field.

To use the other user's value for a field, click **Use** beside the **Other User's Value** field.

Repeat this process for the other affected fields. Note that if another user has deleted an object then your only option is to accept the deletion.

Once you resolve the conflicts you can click **Commit All** again to write your changes to the configuration of the application instance associated with the change list.

> **Note:** Product Designer commits changes in a logical order determined by the software. It does not commit changes in the order they appear in the change list, nor is it possible to influence the commit order of a single change list. If you need to control the order of changes, make your changes in separate change lists and commit the change lists in the required order. You can also use the same change list but commit more frequently.

To revert all changes

Click **Revert All**. Product Designer removes all changes from your change list, effectively restoring the product model to its previous state. Any changes you have made are permanently lost.

> **Note:** When you click **Revert**, Product Designer reloads the entire product model from the workspace. Therefore, Product Designer can display new or updated values after reverting if other users have committed changes to the same workspace.

To validate all changes

Click **Validate Only**. Product Designer performs the same validation that it performs during a **Commit All** operation, but does not commit any of your changes.

> **Note:** When you click **Validate**, Product Designer reloads the entire product model from the workspace. Therefore, Product Designer can display new or updated values after validation if other users have committed changes to the same workspace.

Managing Your Change Lists

In the User menu, click **My Change Lists** to display the **My Change Lists** page.

My Change Lists Page

Examine the details of each of your change lists using the following fields:

Column	Description
Name	Name of the change list. Click the name to open the **Change List** home page. **Note** The name of the active change list appears to the left of the **User** menu in the toolbar.
Active	Displays a check mark ✓ if the change list is active. Only one change list at a time can be active. You can make a change list active by displaying the **Change List** home page and clicking **Make Active**. For more information, see “Change List Home Page” on page 22.
Changes	Number of pending changes in the change list.
Created	Date and time the change list was created.
Created By	Full name of the person who created the change list. Other users can create a change list and then assign it to you.
Comments	Comments about the change list. To add or edit comments, edit the change list. To edit a change list, click the change list name.

Other operations

- **Sort** – Click any column header to sort by that column. Click again to reverse the sort order.
- **Edit** – Click the name to open a page where you can edit the item.
- **Close the page** – Click **Close**. All changes are saved as you make them, so there is no save command.

To add a change list

You can add any number of change lists. The changes in each change list are independent from one another.

> **Note:** If you have multiple change lists, the changes in each of your change lists are completely separate from one another. Until you commit them, the changes you make in one change list do not appear in your other change lists. Therefore, if you create a new change list, its state matches the state of the PolicyCenter instance as of the previous commit operation.

1. Click **Add**.
2. In the **Add a Change List** dialog box:

Change List Name	Name for the new change list. The name can contain any characters, including spaces. To avoid confusion, do not use the same name as any of your other change lists.
Workspace	Workspace with which to associate this change list. A *workspace* is a named association with a set of PolicyCenter configuration files. Your administrator can define multiple workspaces representing multiple PolicyCenter instances. If more than one workspace is listed, contact your administrator to identify the correct workspace to select.
Make this the active change list	Whether to make this the active change list. The active change list is the one that stores the changes you are currently making. Select this check box if you plan to start using this change list right away.

3. Click **OK** to add the new change list.

To delete change lists

Deleting a change list discards all of the changes it contains.

1. Select the change list to delete by clicking anywhere in its row except the change list name. To delete multiple change lists at once, use standard keyboard and mouse key combinations to select multiple rows. The selected rows are highlighted.
2. Click **Delete**.
3. In the **Delete Change Lists** dialog box, review the change lists you are about to delete, and then click **Yes** to delete them.

> **Note:** If you delete or reassign the active change list and more than one change list remains, you must select a new active change list. If only one change list remains, Product Designer automatically makes it the active change list. If you have no other change lists, Product Designer prompts you to create a new change list before allowing you to make any changes.

To assign change lists to another user

You can assign your change list to any other Product Designer user. Examples of when you might want to reassign a change list include:

- You are sharing the project with another user, and now want the other user to review your changes or make additional changes.
- You need a user with different skills or knowledge to complete the work you started.
- You are busy and need to allow other users to do some of the work you started.
- You have been reassigned and need to assign your work to other users.

1. Select the change list to reassign by clicking anywhere in its row except the change list name. To reassign multiple change lists at once, use standard keyboard and mouse key combinations to select multiple rows. The selected rows are highlighted.
2. Click **Reassign**, and then select the user from the **Reassign** menu.

3. In the **Reassign Change Lists** dialog box, confirm that the change lists you intend to reassign are listed, and then click **Yes** to reassign them.

   Note: If you delete or reassign the active change list and more than one change list remains, you must select a new active change list. If only one change list remains, Product Designer automatically makes it the active change list. If you have no other change lists, Product Designer prompts you to create a new change list before allowing you to make any changes.

Change List Home Page

Examine and change the selected change list using the following fields:

Name	Name of the change list. Rename the change list by typing a new name in this text box. The name appears to the left of the **User** menu in the toolbar when the change list is active.
Workspace	Name of the workspace with which this change list is associated. Established when you add a new change list and thereafter cannot be changed.
Created	Date and time the change list was created. You cannot change this value
Created By	Full name of the person who created the change list. You cannot change this value.
Assigned To	Full name of the person to whom the change list is currently assigned. You can reassign the change list to another user by using clicking **Reassign**, as explained in the following procedure.
Changes	Number of pending changes in the change list.
Comments	Comments about the change list. Use this text box to add or edit comments.

Other operations

- **Close the page** – Click **Close** . Alternatively, click the breadcrumb link to return to the **My Change Lists** page. All changes are saved as you make them, so there is no save command.

To assign the change list to another user

You can assign a change list to any other Product Designer user. Examples of when you might want to reassign a change list include:

- You are sharing the project with another user, and now want the other user to review your changes or make additional changes.
- You need a user with different skills or knowledge to complete the work you started.
- You are busy and need to allow other users to do some of the work you started.
- You have been reassigned and need to assign your work to other users.

1. While editing a change list, click **Reassign** and then select the user from the **Reassign** menu.
2. In the **Reassign Change Lists** dialog box, confirm that the change list you intend to reassign is listed, and then click **Yes** to reassign it.

   Note: If you delete or reassign the active change list and more than one change list remains, you must select a new active change list. If only one change list remains, Product Designer automatically makes it the active change list. If you have no other change lists, Product Designer prompts you to create a new change list before allowing you to make any changes.

To make the change list active

- Click **Make Active**.

This command is unavailable if the change list you are editing is already the active change list.

To delete the Change List

Deleting the change list discards all of the changes it contains.

1. Click **Delete**.
2. In the **Delete Change Lists** dialog box, confirm the change list you are about to delete, and then click **Yes** to delete it.

   Note: If you delete or reassign the active change list and more than one change list remains, you must select a new active change list. If only one change list remains, Product Designer automatically makes it the active change list. If you have no other change lists, Product Designer prompts you to create a new change list before allowing you to make any changes.

chapter 4

Product Designer Administration

The following topics explain the how to perform tasks that are available only to Product Designer administrative users.

Administrative tasks include:

- Adding and removing users
- Resetting forgotten passwords
- Granting Administrator rights to other users
- Managing Product Designer localization
- Reassigning change lists from one user to another
- Adding and removing workspaces
- Performing other application-specific tasks

Note: To perform administrative tasks in Product Designer, you must be granted Administrator rights by another user who is already an administrator.

This topic includes:

- "Managing Workspaces" on page 25
- "Editing a Workspace" on page 27
- "Managing Users" on page 28
- "Editing a User" on page 29
- "Managing Change Lists" on page 30
- "Product Designer Localization" on page 32

Managing Workspaces

In the **Options** menu, click **Workspaces** to display the **Workspaces** page.

A *workspace* is a named reference to the root folder of a PolicyCenter instance. Users select a workspace when creating a change list to identify the PolicyCenter instance to which their changes are to be committed. Product Designer must have at least one workspace defined.

- When running as single-user instance, Product Designer has a preconfigured workspace named **Default workspace** that uses the PolicyCenter instance in which it resides. If needed, you can define additional workspaces that point to other PolicyCenter instances.
- When installed as a multi-user instance, you must define at least one workspace before anyone can use Product Designer. You define this initial workspace by running Product Designer. You are prompted to define a workspace as soon as you log in. As with a single-user instance, you also can define additional workspaces as needed.

Workspaces Page

The **Workspaces** table shows information about each workspace that has been defined:

Column	Description
Name	Workspace name, as specified in the **Add a Workspace** dialog box.
Folder	Local or network path name to the root configuration folder, as specified in the **Add a Workspace** dialog box.
Version Control System	Name of version control system, one of: **None** – No version control system is configured. **Perforce** – Perforce version control is configured. **Note** Product Designer interacts directly with Perforce version management software to check out product configuration files, which you then must check in manually. You can use a different version control system by manually checking out files as needed prior to changing them.
Change_Lists	Number of change lists in this workspace.
Changes	Total number of changes in all of the change lists in this workspace.
Created	Date and time the workspace was created.
Created By	Full name of the user who created the workspace.

Other operations

- **Sort** – Click any column header to sort by that column. Click again to reverse the sort order.
- **Edit** – Click the name to open a page where you can edit the item.
- **Close the page** – Click **Close**. All changes are saved as you make them, so there is no save command.

To add a workspace

1. On the **Workspaces** page, click **Add**.
2. In the **Add a Workspace** dialog box, fill in the following fields:

Field	Description
Name	Name of the workspace. Can contain any characters.
Configuration Root Folder	Local or network path name to the root folder of the workspace. For example, a PolicyCenter instance is deployed as follows: • Server – Server1 • Path name – Guidewire/PolicyCenter In this case, the configuration root folder is **//Server1/Guidewire/PolicyCenter**. For a single-user local instance of Product Designer, you can click on the search icon to locate the configuration root folder. **Note:** Product Designer checks the specified path for the presence of valid configuration files.

3. Click **OK** to add the new workspace.

To delete workspaces

1. Select a workspace to delete by clicking anywhere in its row except the name or folder. To delete multiple workspaces at once, use standard keyboard and mouse key combinations to select multiple rows. The selected rows are highlighted.

   IMPORTANT Deleting a workspace causes all users who have change lists within the workspace to lose all of their work. Exercise caution before deleting a workspace.

2. Click **Delete**.
3. In the **Delete Workspaces** dialog box, you can view the number of change lists and changes that are present in the workspaces you have elected to delete. If needed, click **No** to cancel this operation and handle any issues with uncommitted changes.
4. Click **Yes** to delete the workspaces.

   Note: Users who have no change lists in workspaces other than the one you delete must add a new change list before they can make changes within Product Designer.

   Note: If you delete all workspaces, users cannot make any changes to the product model until you define a new workspace. When no workspaces exist, Product Designer prompts you to define a workspace when you log in.

Editing a Workspace

Workspace Home Page

Examine and edit the details of the selected workspace.

Field	Description
Basic settings section	
Name	Workspace name, as specified in the **Add a Workspace** dialog box. You can change the name at any time without affecting associated change lists.
Configuration Root Folder	Local or network path name to the root configuration folder, as specified in the **Add a Workspace** dialog box. Established when you add a new workspace and thereafter cannot be changed.
Created	Date and time the workspace was created. You cannot change this value.
Created By	Full name of the user who created the workspace. You cannot change this value.
Change Lists section	
Change Lists	Number of change lists associated with this workspace. Click the adjacent **Expand** ▶ icon to expand the **Change Lists** section.
Name column	Name of the change list associated with this workspace.
Assigned To column	Name of the user to whom the change list is currently assigned.
Changes column	Number of uncommitted changes in the change list.
Changes	Total number of uncommitted changes in all change lists associated with this workspace.
Version Control section	

Field	Description
Version Control System	Version control system, one of: **None** – No version control system is used. **Perforce** – Perforce version control is used. Selecting this option expands the Perforce Configuration section. **Note** Product Designer interacts directly with Perforce version management software to check out product configuration files, which you then must check in manually. You can use a different version control system by manually checking out files as needed prior to changing them.
Perforce Configuration section	
Server Name:Port	Name and port of Perforce server. For example: `perforce:1666`.
Client	Name of Perforce client specification that maps a to a Perforce workspace that includes a root configuration folder.
User Name	Perforce user name.
Password	Perforce password
Test Server section	
Test Server URL	URL of the PolicyCenter development instance to which to synchronize files when users select **Synchronize Product Model** or **Synchronize System Tables** from the **Options** menu.
User Name	User name of a user who has admin role in PolicyCenter.
Password	Password for the specified user name. **Important:** Providing the user name and password of a PolicyCenter user in this page suppresses the **Synchronize Product Model** and **Synchronize System Tables** dialog boxes. Users then do not see the informational message that explains the potential impact of synchronize operations.

Managing Users

In the **Options** menu, click **Users** to display the **Users** page.

Users Page

The **Users** table shows information about each Product Designer user:

Column	Description
Name	Full name of the user. The full name appears when managing change lists and in certain administrative tasks.
User Name	Name the user types when logging in to Product Designer. Users can change their own user names at any time.
Administrator	Select the check box to grant administrative rights to the user.

Other operations

- **Sort** – Click any column header to sort by that column. Click again to reverse the sort order.
- **Edit** – Click the name to open a page where you can edit the item.
- **Close the page** – Click **Close**. All changes are saved as you make them, so there is no save command.

To add a user

1. On the **Users** page, click **Add**.

2. In the **Add User** dialog box, fill in the following fields:

Field	Description
User Name	Name the user enters to log into Product Designer. Can contain any characters except spaces, and must be unique.
Full Name	Full name of the user. Appears when managing change lists and in certain administrative tasks.
Default Password	Initially contains an automatically-generated password that you can overwrite if needed. Pay attention to the stated password requirements. Make a record of the password so that you can later provide it to the user.
Administrator	Whether this user has administrative rights. Select this check box to add an administrative user. Administrative users can manage users, workspaces, and change lists for all users. Clear this check box when adding an ordinary user. Ordinary users can manage their own user settings and change lists only. **Note:** This setting affects Product Designer administration only. It has no effect on PolicyCenter administration.

3. Click **OK** to add the new user.

To delete a user

1. Select a user to delete by clicking anywhere in its row except the name or user name.
2. Click **Delete**.
3. In the **Delete a User** dialog box, choose an option for handling the user's change lists. The number of change lists assigned to the user appears in parentheses. You can choose:
   - **Delete** – Delete the user's change lists.
   - **Assign to Me** – Assign the user's change lists to yourself. If you are concerned about uncommitted changes any of this user's change lists, choose this option so that you can review the changes.
4. Click **Yes** to delete the user.

Editing a User

User Home Page

Examine and edit the details of the selected user. The page title includes the user's full name followed by the user's user name in brackets. For example:

Alice Applegate [aapplegate]

User Name	Name the user enters to log into Product Designer. Can contain any characters except spaces, and must be unique. **Note:** User names are case-sensitive.
Full Name	Full name of the user. Appears when managing change lists and in certain administrative tasks.
Language	User interface language for Product Designer. Select a language from the drop-down list.
Regional Formats	Regional formatting for numbers, dates, and monetary values. Select a format from the drop-down list.
Administrator	Whether this user has administrative rights. Select this check box to designate the user as an administrator. Administrative users can manage users, workspaces, and change lists for all users. Clear this check box when designate the user as an ordinary user. Ordinary users can manage their own user settings and change lists only. **Note** This setting affects Product Designer administration only. It has no effect on PolicyCenter administration.

To reset a user's password

1. From the **User** home page, click **Reset Password.**
2. In the **Reset Password** dialog box, make a note of the automatically-generated password. Alternatively, replace it with a password of your choice. Pay attention to the stated password requirements.
3. Click **OK**.
4. Provide the new password to the user.

To delete a user

1. From the **User** home page, click **Delete**.
2. In the **Delete a User** dialog box, choose an option for handling the user's change lists. The number of change lists assigned to the user appears in parentheses. You can choose:
   - **Delete** – Delete the user's change lists.
   - **Assign to Me** – Assign the user's change lists to yourself. If you are concerned about uncommitted changes any of this user's change lists, choose this option so that you can review the changes.
3. Click **Yes** to delete the user.

Managing Change Lists

As you work in Product Designer and make changes to the PolicyCenter configuration, Product Designer stores a record of those changes in a *change list*. When you are ready to save your changes to the PolicyCenter configuration, you use Product Designer to commit the change list. Then, all changes in the change list are written to the PolicyCenter instance associated with the workspace to which the change list belongs. If needed, you can discard any or all changes in the change list by reverting individual changes or reverting all changes.

All users can:

- Create their own change lists.
- Commit or revert the changes in their active change list.
- Change their active change list.
- Assign their change lists to other users.
- Delete their own change lists.

Administrative users can do any of these tasks, plus:

- Reassign any user's change list to another user.
- Delete any user's change list.

In the **Options** menu, click **Change Lists** to display the **Change Lists** page.

Change Lists Page

The **Change Lists** table shows information about each change list:

Column	Description
Name	Change list name, as specified in the **Add Change List** dialog box.
Active	Whether the change list is the active change list of the user indicated in the **Assigned To** column.
Changes	Number of uncommitted changes in the change list.
Assigned To	Full name of the user to whom the change list is currently assigned.
Created	Date and time on which the change list was created.
Created By	Full name of the user who created the change list.
Comments	Comments that have been added in the **Change List** home page.

Other operations

- **Sort** – Click any column header to sort by that column. Click again to reverse the sort order.
- **Edit** – Click the name to open a page where you can edit the item.
- **Close the page** – Click **Close**. All changes are saved as you make them, so there is no save command.

To add a change list

1. On the **Change Lists** page, click **Add**.
2. In the **Add a Change List** dialog box, fill in the following fields:

Field	Description
Change List Name	Name of the change list. Can contain any characters.
Workspace	Workspace with which this change list is associated. Select a workspace from the list. Typically, each workspace designates a different PolicyCenter instance. Many Product Designer instances need only a single workspace because they are associated with a single PolicyCenter instance. But if your configuration includes multiple PolicyCenter instances, be sure to select the intended workspace.
Make this the active change list	Whether the new change list becomes your active change list. **Note:** When you add a new change list, it is initially assigned to you. If you want to assign it to another user, use the **Reassign** command.

3. Click **OK** to add the new change list.

To delete change lists

1. Select a change list to delete by clicking anywhere in its row except the name. To delete multiple change lists at once, use standard keyboard and mouse key combinations to select multiple rows. The selected rows are highlighted.
2. Click **Delete**.
3. In the **Delete Change Lists** dialog box, warnings alert you to any issues related to deleting active change lists or leaving users with no active change list assigned. If needed, click **No** to cancel this operation and handle these issues.
4. Click **Yes** to delete the change lists.

To reassign change lists

1. Select a change list to reassign by clicking anywhere in its row except the name. To reassign multiple change lists at once, use standard keyboard and mouse key combinations to select multiple rows. The selected rows are highlighted.
2. Click **Reassign** and select a user from the drop-down menu.
3. In the **Reassign Change Lists** dialog box, warnings alert you to any issues related to reassigning active change lists or leaving users with no active change list assigned. If needed, click **No** to cancel this operation and handle these issues.
4. Click **Yes** to reassign the change lists.

Product Designer Localization

Product Designer can now be localized by installing a Guidewire language pack or by custom configuration. Localization of Product Designer display strings and online help requires that you unpack the `productdesigner.war` file, add translated resource files, and then create a new `.war` file. The unpack and repack operations are automated by new scripts located in the `productdesigner/language-config` directory. A new `language.properties` file enables you to configure available and default languages. The process is documented in a `readme.html` in the same location.

Product Designer supports the concept of language hierarchies when displaying read-only product model fields. If you are working with a product model that has fields derived from both a locale-specific language and a generic language, Product Designer displays read-only values from both locations. For example, if your product model contains both Japanese (`ja`) and Japanese (Japan) (`ja_JP`) fields, Product Designer displays fields from both locations. It first checks for a locale-specific field. If a locale-specific field exists, Product Designer displays it. If no locale-specific field exists, Product Designer displays the equivalent field from the appropriate generic language. Note that the concept of language hierarchies also applies to Product Designer display keys.