

CONFIGURING LOCATION GROUPS & PAGES



----- Lesson objectives

By the end of this lesson, you will be able to:

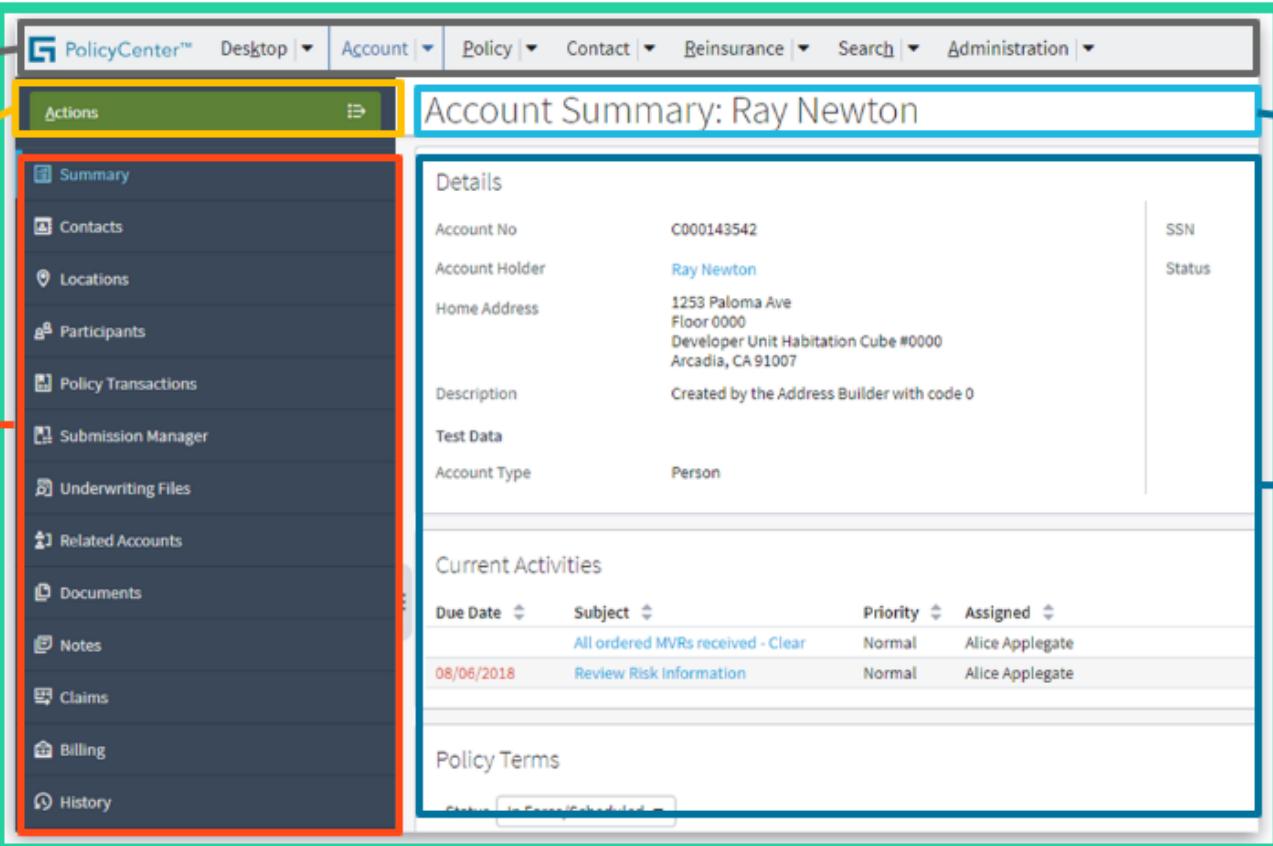
- Describe the architecture of a location group
- Configure existing location groups
- Create and modify pages



Location group and page basics

Location groups

A **location group** is a collection of locations used to provide structure and navigation for a group of related pages through menus or other interface elements



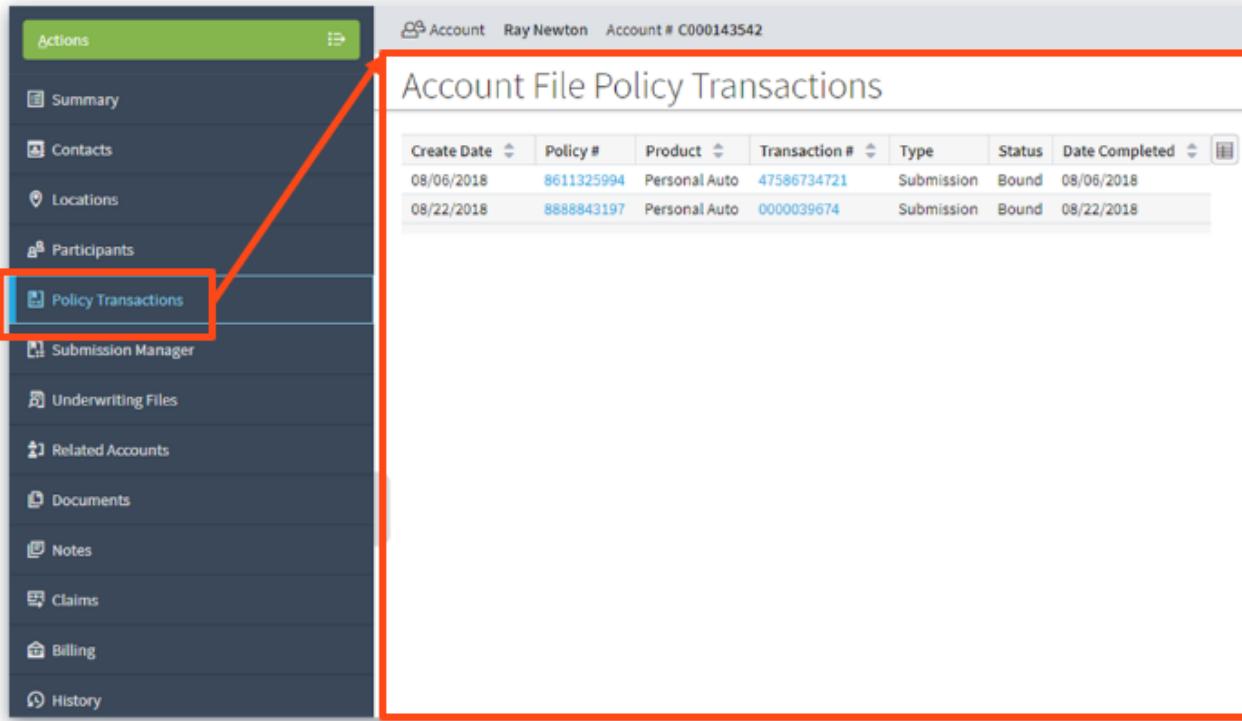
The screenshot shows the PolicyCenter interface with various UI elements highlighted:

- Tab bar:** Located at the top, showing tabs for Desktop, Account, Policy, Contact, Reinsurance, Search, and Administration.
- Menu actions:** A yellow box highlights the "Actions" menu on the left sidebar.
- Menu links:** A red box highlights the "Locations" link in the "Actions" menu.
- Location group:** A green box highlights the main content area, which displays an "Account Summary" for "Ray Newton".
- Info bar:** A blue box highlights the top header of the main content area, which includes the account name and summary.
- Page:** A blue box highlights the bottom section of the main content area, which displays "Current Activities" and "Policy Terms".

Pages

A **page** is a location that contains a single screen in the main frame

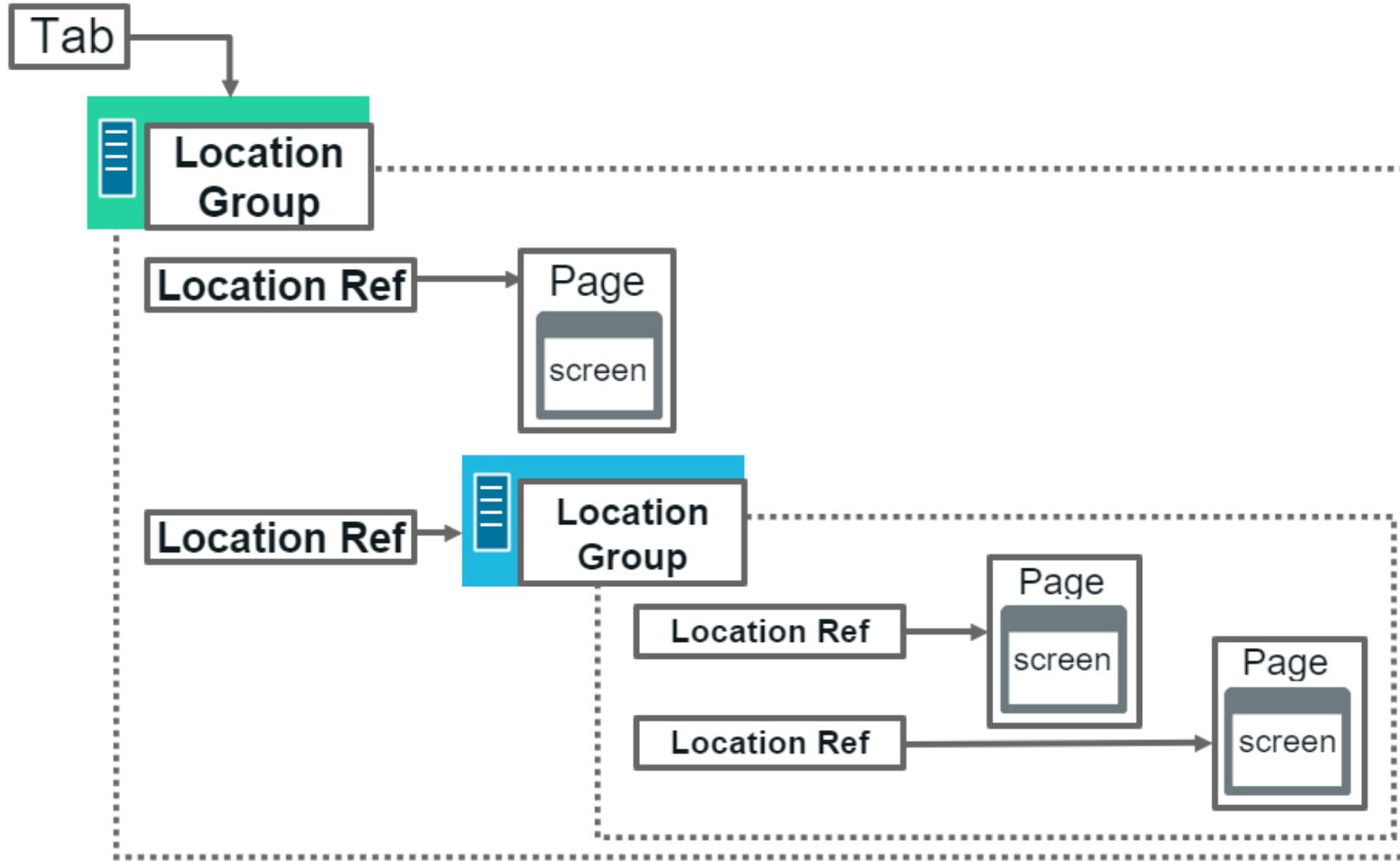
- Used exclusively within location groups
- Menu link / location ref (in sidebar) pointing to a page



The screenshot shows a user interface for managing account file policy transactions. On the left, there is a dark sidebar menu with various options: Summary, Contacts, Locations, Participants, Policy Transactions (which is highlighted with a red box), Submission Manager, Underwriting Files, Related Accounts, Documents, Notes, Claims, Billing, and History. At the top of the main content area, it displays the account information: Account Ray Newton Account # C000143542. Below this, the title 'Account File Policy Transactions' is shown, followed by a table listing two transactions:

Create Date	Policy #	Product	Transaction #	Type	Status	Date Completed
08/06/2018	8611325994	Personal Auto	47586734721	Submission	Bound	08/06/2018
08/22/2018	8888843197	Personal Auto	0000039674	Submission	Bound	08/22/2018

Architecture of a location group





Location group and page configuration

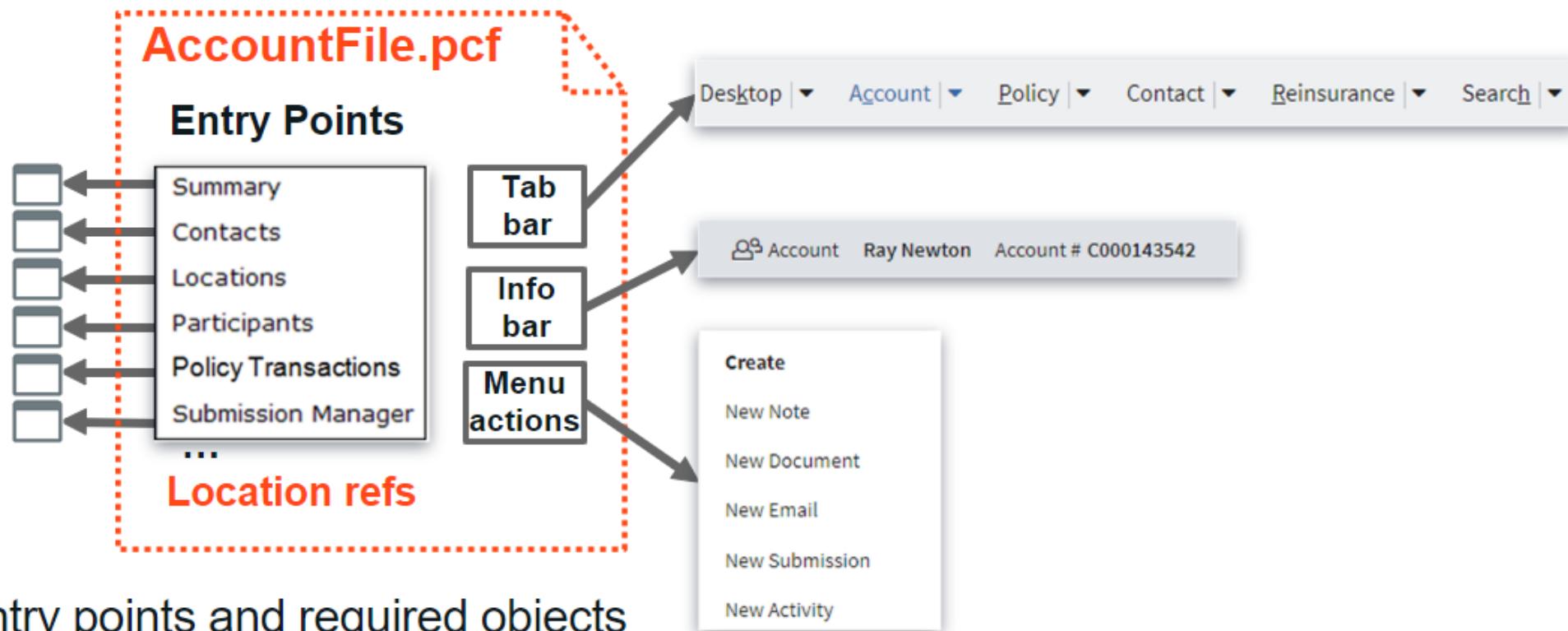
Two levels of configuration

- LocationGroup-level
 - Entry point and navigation to location group
 - MenuActions, TabBar, InfoBar
 - Permissions to visit
 - Location refs
- Page-level
 - Screen that a page renders
 - Page logic (visibility, editability)
 - Page labels



Location group configuration

Information in location group PCF



- Entry points and required objects
- Location refs point to pages or child location groups
- Attributes that point to separate files for tab bar, info bar and menu actions



Entry points for location group

1. Define the entry point
 - *EntryPointName(ObjectName: ObjectType)*
 - Example: AccountFile(account:Account)
2. Define each object used in entry point as a variable on Variables tab
3. Navigate from a widget to a location group
 - Syntax for an action attribute in the navigation widget
EntryPointOfLocation.go(objectsToPass)



Location group property: canVisit

- If **canVisit** evaluates to true, the tab or link to a location group is visible and clickable
- Editability for location group is controlled at the level of each page



Steps for creating a location group

1. Create new PCF of type **Location Group**
2. Set essential information:
 - **title**
 - Entry point with matching variable (**Entry Points** tab)
 - A variable for each object in entry point (**Variables** tab)
 - MenuActions, InfoBar and TabBar
3. Add location references for all included pages and location groups
4. Call the new location group in the **action** property of a navigation widget
5. Deploy changes



Page configuration



Page PCFs

- Page PCF file shows references to all embedded content in Studio
 - Page content: Screens, Toolbars, PanelRefs, DetailsViews, ListViews and others
 - Menu links, Tab bars are also visible in the Page in Studio, but not part of physical page PCF
- Pages are referenced by location refs in location groups
 - LocationPropertyOfLocationRef: *EntryPointOfPage(objectsToPass)*



Page properties

- Title label of a page in the user interface comes from page's **title** property
- If **canVisit** evaluates to true, the link to a page is visible and clickable
- A page is either in read-only or edit mode
 - If **canEdit** evaluates to true, the page has Edit/Update buttons
 - If **startInEditMode** is true, then page renders in Edit mode



Steps for creating a page

1. Create new PCF of type **Page**
2. Set essential properties:
 - **title**
 - Entry point with matching variable (**Entry Points** tab)
 - A variable for each object in entry point (**Variables** tab)
3. Add a screen
4. Include panels for viewable and/or editable content



Steps for creating a page - continued

5. For editable pages:
 - Set **canEdit** property
 - Add **Edit Buttons** to the page's screen
6. In the location group that will contain the page, add a **locationref** widget for navigation to the page



Lesson objectives review

You are now able to:

- Describe the architecture of a location group
- Configure existing location groups
- Create and modify pages



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