

CONFIGURING JOB WIZARDS

Configuring Job Wizards



Source : Guidewire Educational Platform

Lesson objectives

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

- Describe the architecture of job wizards
- Configure existing job wizard
- Create and modify job wizard steps

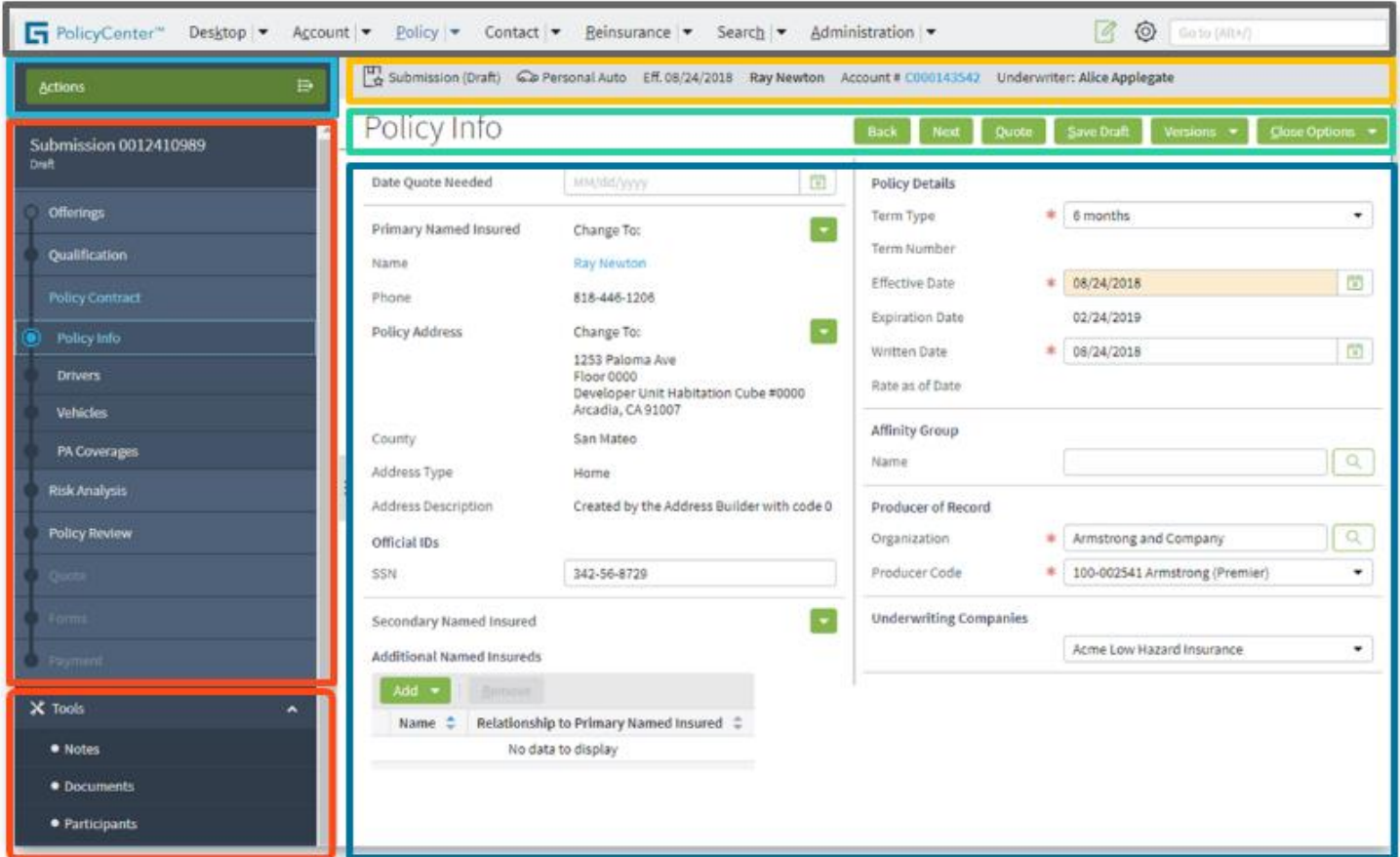




Job wizard basics

Job wizards

A **job wizard** is a location with one or more screens in order, in which only one screen is active at a time



Actions menu

Dependent steps

Screen

Tab bar

Info bar

Tool bar

Independent steps



Comparing job wizards and location groups

- Both are assigned to a single tab
- Both reference multiple screens
- Both can have a set of screens that have no inherent order
- Both have a shared tab bar, info bar, actions menu, and side bar



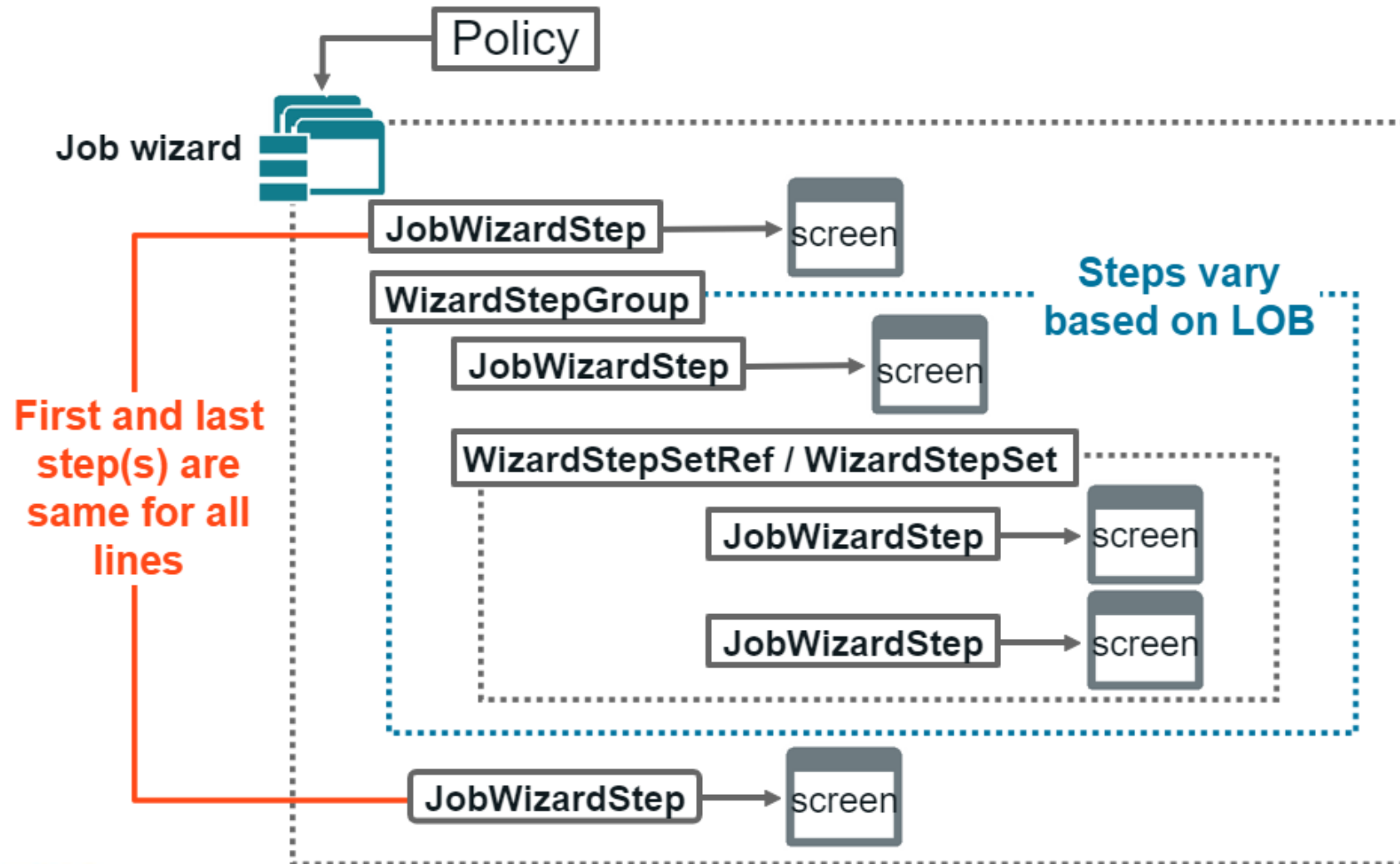
Contrasting job wizards and location groups

- Wizards have a toolbar specifically for navigating through the screens
- Wizards access screens directly (as opposed to using pages)
- Wizards have a set of screens which have an inherent order
- Wizard screen availability can be tied to where you are in the wizard

Job wizards in the base application

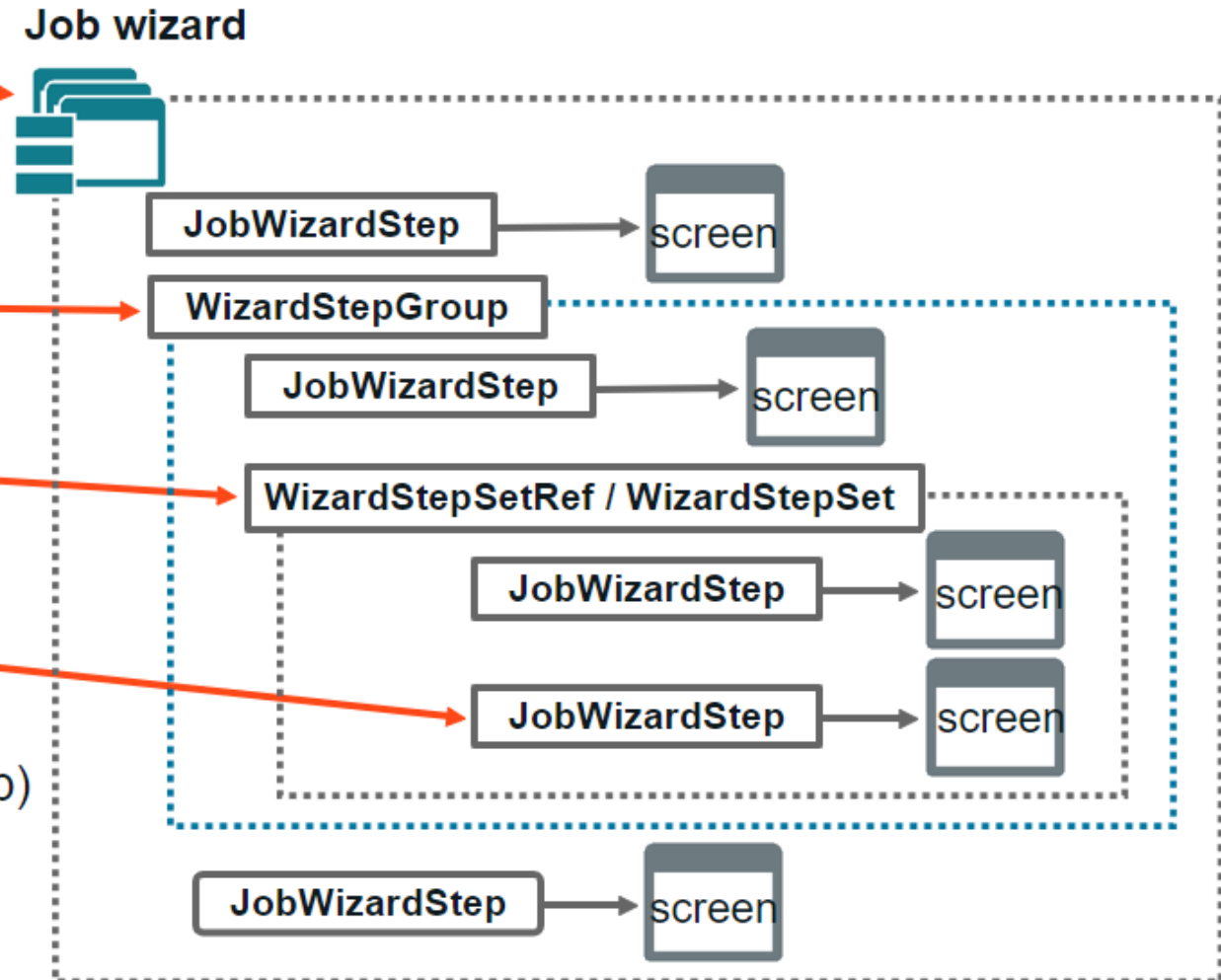
- Submission Wizard
- Renewal Wizard
- Reinstatement Wizard
- Policy Change Wizard
- Audit Wizard
- Cancellation Wizard
- Rewrite Wizard
- Issuance Wizard

Job wizard architecture



Job wizard configuration levels

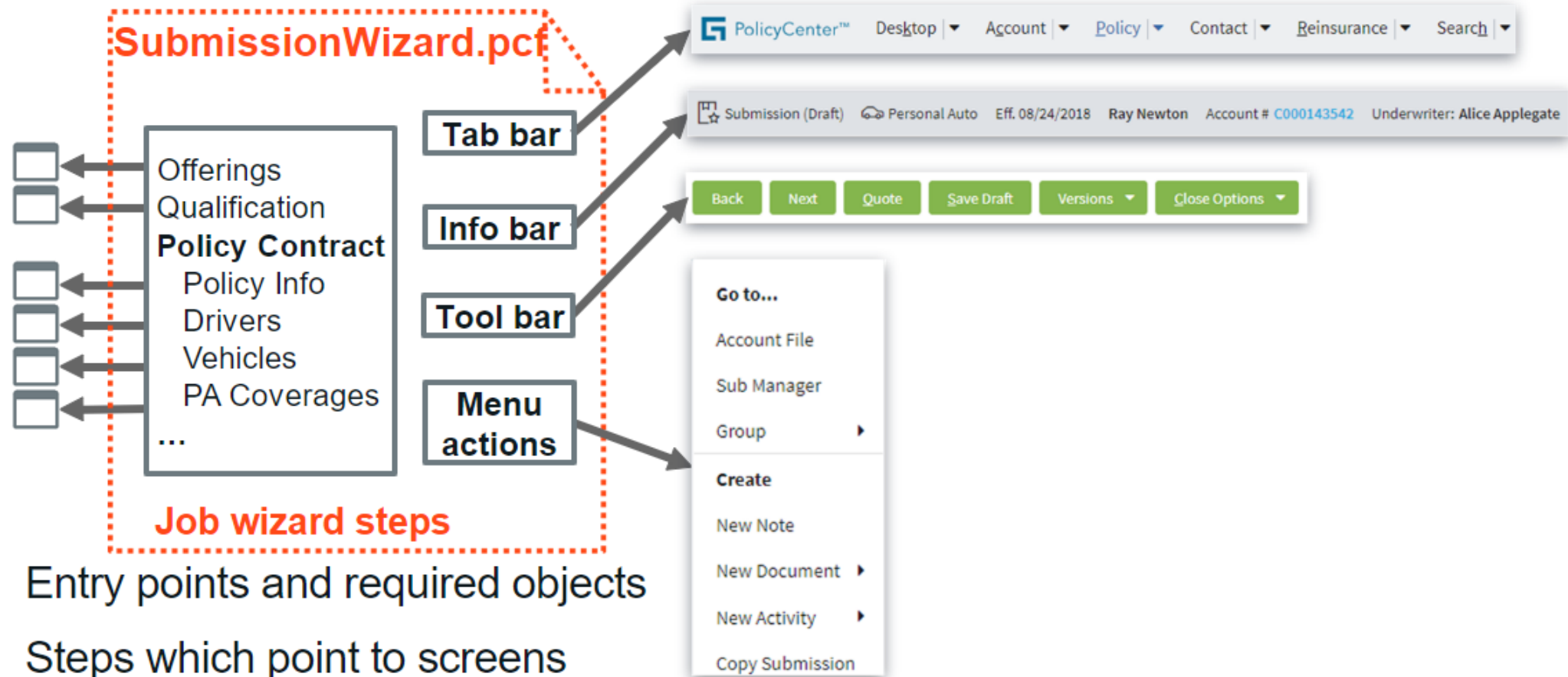
- JobWizard
 - Entry point and navigation to wizard
 - Permissions to visit and edit
- WizardStepGroup
 - Group label if applicable
- WizardStepSet level
 - Visibility and mode for grouping
- JobWizardStep level
 - Screen that a step renders
 - Step logic (visibility, editability, next step)
 - Step order
 - Independent steps





Job wizard configuration

Information in job wizard PCF



- Entry points and required objects
- Steps which point to screens
- Properties that point to separate files for tab bar, info bar, tool bar, and menu actions

Job wizard properties: countsAsWork

- Allows a user to resume working in a wizard after leaving the wizard without saving
- If set to true and user navigates away before finishing a wizard, wizard step is listed as Unsaved Work in the same session

Job wizard properties: **canVisit** and **canEdit**

- If **canEdit** evaluates to true, the job wizard is editable when in edit mode
 - Some conditions include: edit permission, job state
- If **canVisit** evaluates to true, the users can view the job wizard
 - Some conditions include: view permission
- Examples:
 - Users without edit permission cannot edit submissions in draft mode
 - A bound (completed) submission is not editable, but may be viewable

Job wizard entry points and variables tabs

- Entry point definition
 - Syntax: `EntryPointName(objectName1 : ObjectType1, objectName2 : ObjectType2 ...)`
 - Examples:
 - `SubmissionWizard(submission : Submission, policyPeriod : PolicyPeriod)`
 - `SubmissionWizard(submission : Submission, policyPeriod : PolicyPeriod, wizardStep : String)`
- Variables tab: Each object expected in all entry points must be declared here
- Navigating to a job wizard
 - Syntax: `EntryPointName.go(objectsToPass)`
 - Example: `JobForward.pcf → SubmissionWizard.go(job as Submission, policyPeriod, wizardStep)`



JobWizardStep configuration

WizardStepGroup

A WizardStepGroup is a set of wizard steps which:

- are indented
- have a single parent label
- Example:

SubmissionWizard -> Policy Contract group

WizardStepSet and WizardStepSetRef

- A **WizardStepSet** is a set of wizard steps which have shared logic (visible, available, mode) and can be inserted into a wizard directly or into a wizard group
- A **WizardStepSetRef** is a reference to the PCF where the step set is stored

Independent job wizard steps

- To make a step independent, set its independent attribute to true
- The independent steps' title and title icon are set in the job wizard widget
- Example
 - SubmissionWizard -> Tools section

Order of job wizard steps

Is determined by order in which they appear in PCF

- Job wizard displays all visible steps in order declared
- Dependent steps are always in top box
- Independent steps are always in bottom box
- Child steps of a job wizard step group are indented

Screens PCFs

- Screens are referenced by job wizard steps
 - ScreenPropertyOfJobWizardStep = *EntryPointOfScreen(objectsToPass)*
- A screen PCF contains references to all embedded content
- Screen related labels
 - **Title** determines the text displayed in the title bar of a screen
 - **Label** determines the text displayed in the sidebar
- Buttons on screen
 - Wizard button (previous / next) behavior is handled automatically
 - Toolbar buttons are displayed based on job type and status



Lesson objectives review

You are now able to:

- Describe the architecture of job wizards
- Configure existing job wizard
- Create and modify job wizard steps



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