



# CONFIGURING JOB WIZARDS



## Configuring Job Wizards



# 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

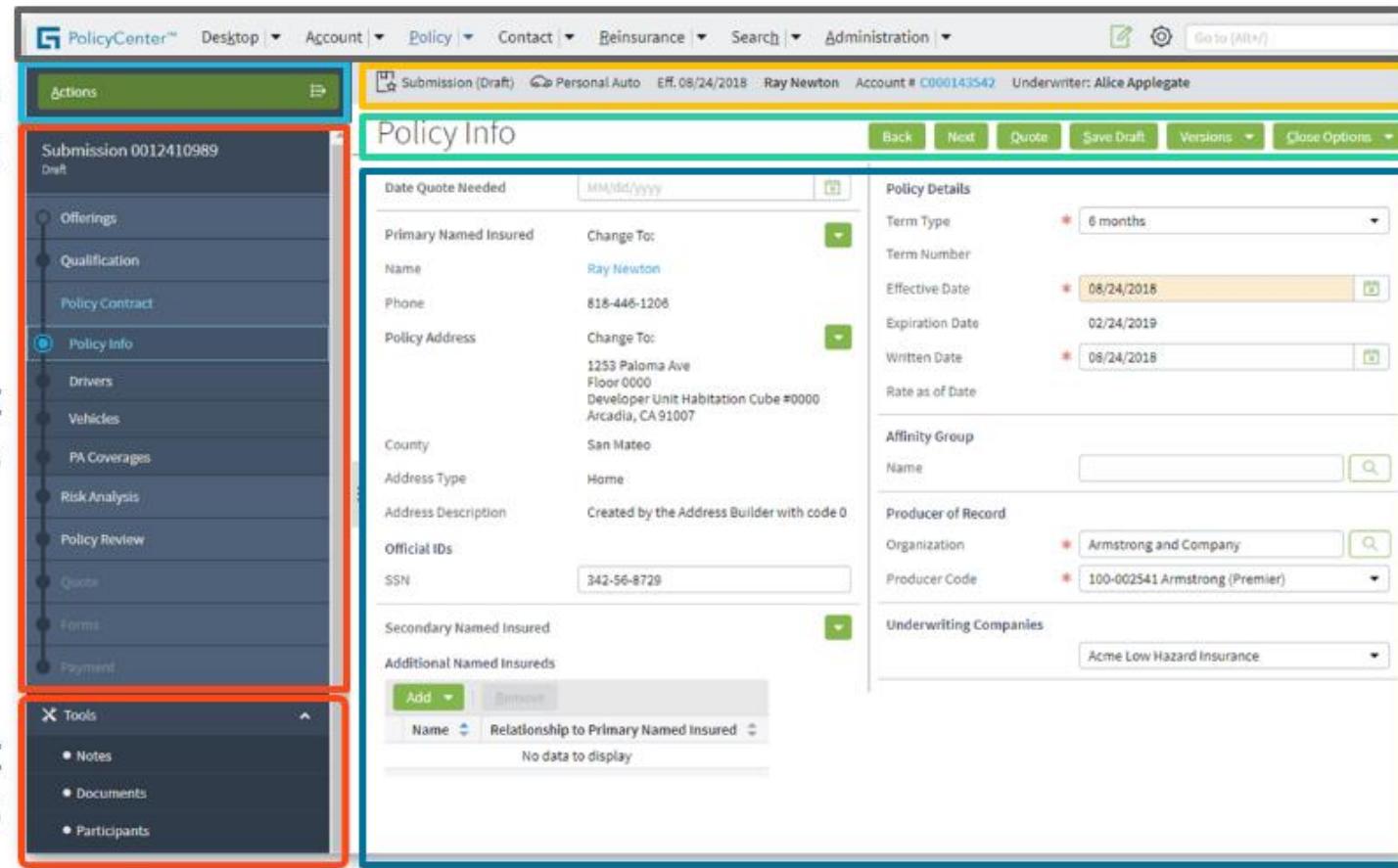
# Job wizards

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**

**Independent steps**



**Tab bar**  
**Info bar**  
**Tool bar**

**Screen**

# 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

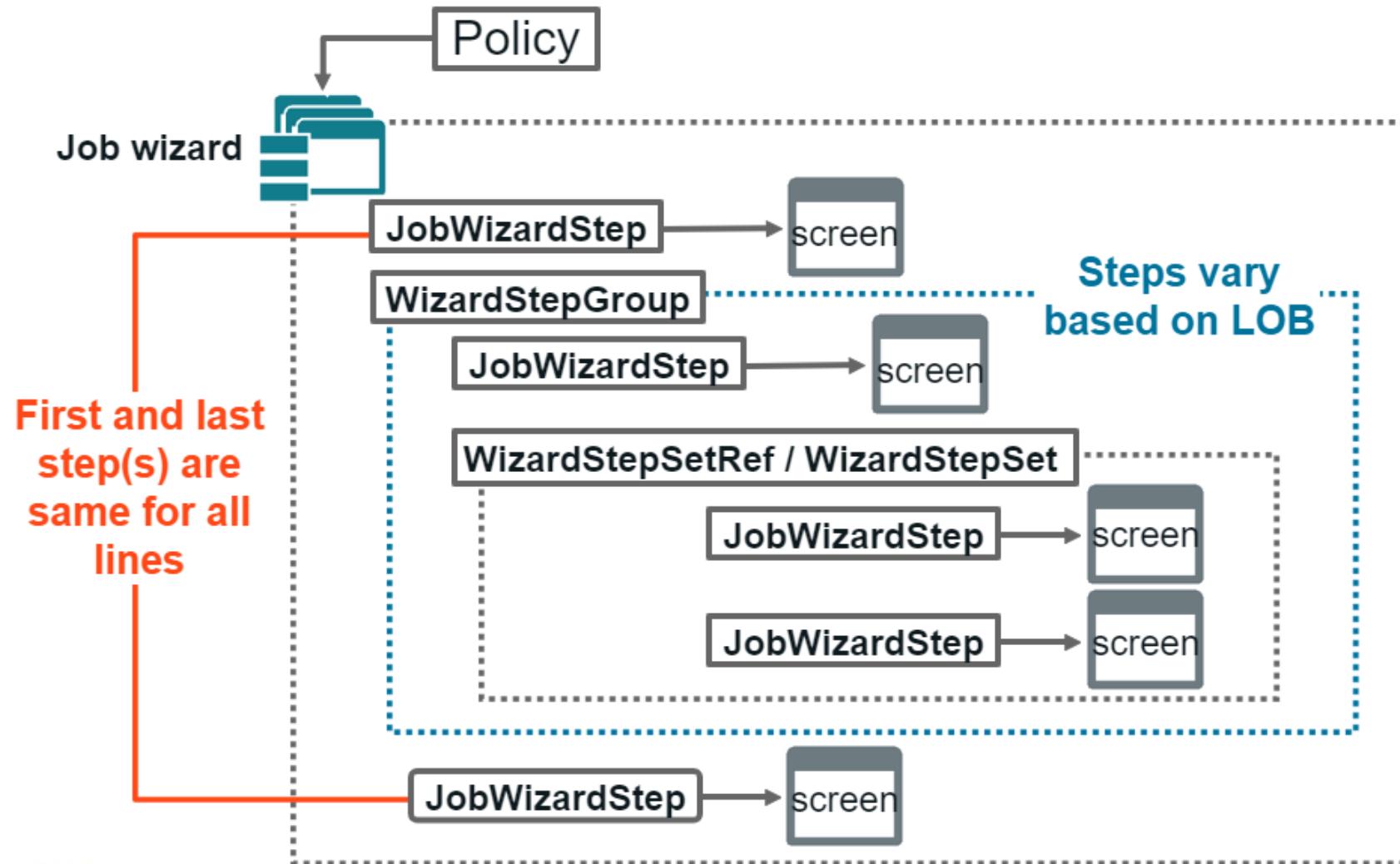
# Contrasting job wizards and location groups

- 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

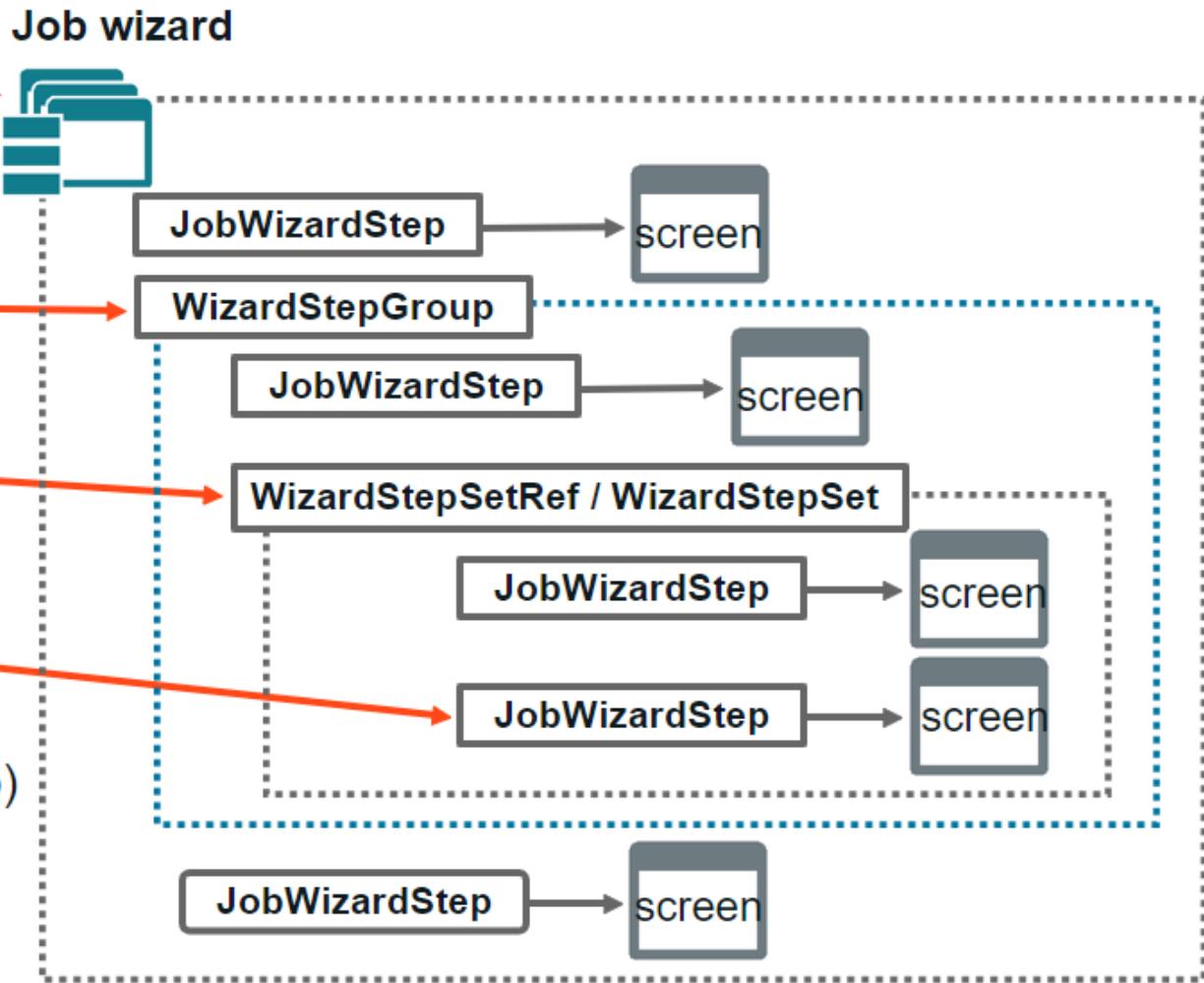
- Submission Wizard
- Renewal Wizard
- Reinstatement Wizard
- Policy Change Wizard
- Audit Wizard
- Cancellation Wizard
- Rewrite Wizard
- Issuance Wizard

# Job wizard architecture



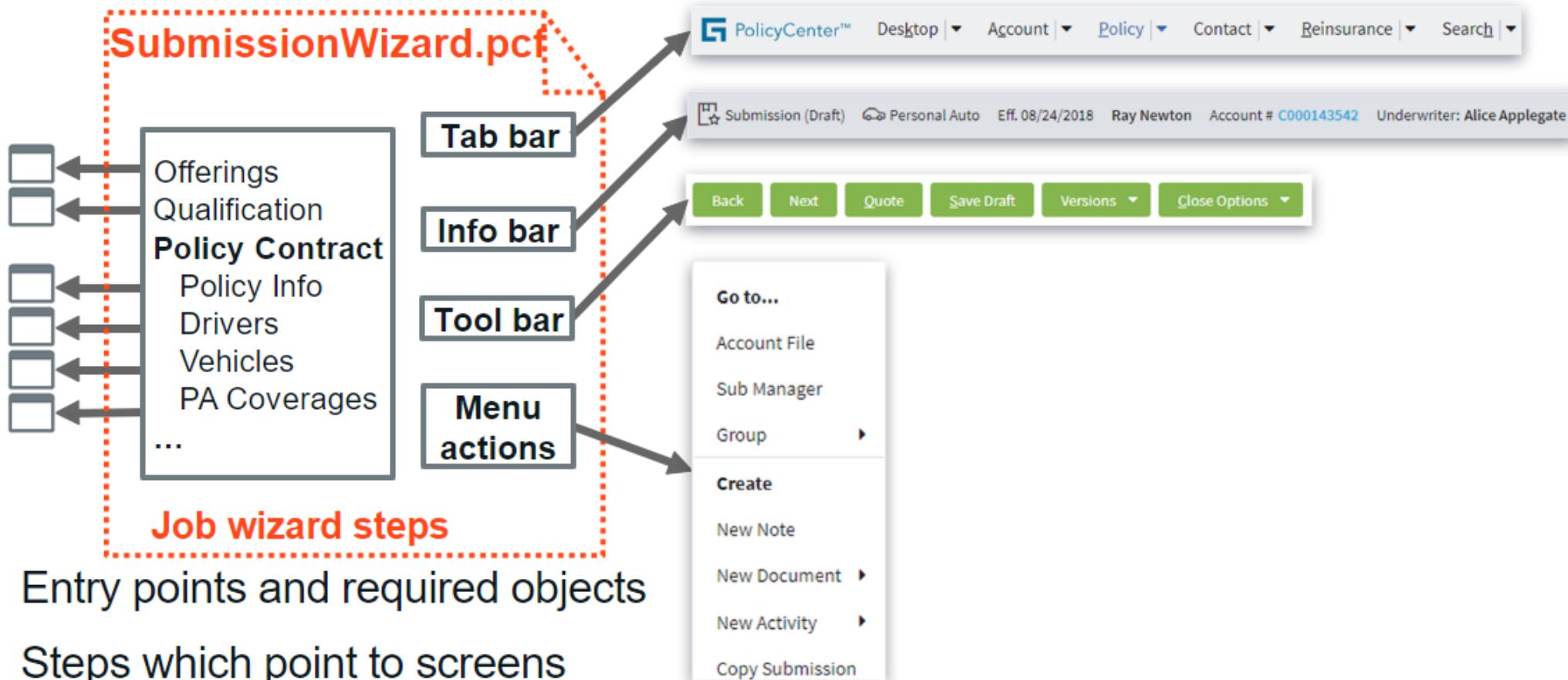
# Job wizard configuration levels

- JobWizard
  - Entry point and navigation to wizard
  - Permissions to visit and edit
- WizardStepGroup
- WizardStepSet level
- 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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