

Axis — Step-by-step Walkthrough

Find an existing business screen, change its title/help and one control label through review, then create a small source-bound screen with explicit IAM access mappings.

Use the current tenant, profile and permitted actions. Screenshots illustrate the application; example records and date fields may differ in your environment.

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Demonstration story, prepared data and participants

Find an existing business screen, change its title/help and one control label through review, then create a small source-bound screen with explicit IAM access mappings.

Worked example and preparation

Use a training screen bound to the approved IAM Domains source, if that source is offered to your profile. Prepare existing page/control permissions and a distinct reviewer. A source choice identifies readable business data; it does not grant access.

Responsibilities

Role	Responsibility
Screen author	Maintains screen details, fields and control presentation.
Mapping owner	Confirms ownership where the mapping workflow requires it.
Independent reviewer	Decides the exact submitted screen/control/mapping revision.
IAM administrator	Maintains menu/page/control grants separately.

Terms used in this module

Term	Meaning
Screen	The owning definition for title, help, layout and child controls.
Control	A stable field, column, action or other element belonging to one screen.
Business source	An approved catalog entry exposing typed business fields.
Navigation section / menu group	The sidebar section and optional subgroup used to organize the screen.

The procedures below explain operation. Application captures use illustrative records. Record actual demonstration and UAT outcomes separately; a written expected result is not a recorded pass.

Demonstration sequence and visible outcomes

Business journey	Open the detailed steps
Existing screen and field presentation	<u>Open the owning screen and inspect its controls</u> <u>Maintain the screen title and header help</u> <u>Edit a control label, help and display format in context</u>

Business journey	Open the detailed steps
Source-bound screen to reviewed publication	<u>Create a source-bound screen and explain every setup field</u> <u>Add fields and map existing IAM permissions</u> <u>Preview, review, publish and revise without losing authority</u>

CHAPTER 3

Demonstration · Open the owning screen and inspect its controls

Open	Who acts
System Access → Experience Administration → Screens	Screen reader or author

Keep the screen definition and its fields together. A controls directory entry is a route to its owning screen, not a second unrelated definition.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Screen name / code search	A business title or stable code	Use the owning record to avoid editing a same-named control on another screen.
Controls count	The number of child controls shown for the screen	A count does not prove those controls are granted to the selected profile.
Review	Current or pending presentation state	Pending changes must be distinguished from effective presentation.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Search Screens for the intended business screen.	The result identifies its owning record.
2	Select Open screen and inspect Screen details.	The screen title, help and identity share one record context.
3	Select Fields / Controls.	Only controls belonging to that screen are listed.
4	Open a field or action and compare its stable identity and type.	The selected label belongs to the intended control.
5	Refresh, return to Screen details and use Back.	Ownership and return context remain intact.

Evidence to show before continuing

Show one owning screen, its details and its child controls through refresh and Back.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The screen list loads but Create options fail	Retain the failing request/correlation and retry after the service correction; a partial list is not proof all editor dependencies loaded.
The tab is unavailable	Check the separate control permission; screen read alone does not authorize control maintenance.

Next part of the demonstration

Edit the selected screen presentation or one of its controls.

CHAPTER 4

Demonstration · Maintain the screen title and header help

Open	Who acts
Screens → selected screen → Screen details	Screen author and eligible reviewer

Maintain the title and header tooltip in screen metadata so the rendered help follows the approved definition.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Screen title / name	Use a clear business title	Changing the name does not change the stable code or permissions.
Screen help / header help	Explain purpose, prerequisites and the next action	This text supplies screen-level guidance, rather than a field label.
Change reason	Describe the user problem and proposed correction	The reviewer needs a meaningful comparison.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Open Screen details and read the current title/help.	The current approved wording is known.
2	Enter a precise replacement title or help text with a business reason.	The proposal changes presentation on this screen only.
3	Save/submit the supported presentation change.	The pending wording remains separate from current values.
4	The eligible reviewer compares before/after and decides on the same screen.	The exact revision has a recorded decision.
5	Reopen the rendered business screen and its question-mark help.	The approved title/help is displayed.
6	Inspect the owning record's history.	The requester, reason, reviewer and outcome are retained.

Evidence to show before continuing

Show current/pending comparison, decision and the actual rendered tooltip.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The rendered wording remains old	Check approved/effective state, correct screen identity and refresh after publication.
The proposal was rejected	Read its reason; the previous approved wording should remain current.

Next part of the demonstration

Maintain field-specific guidance on the relevant control rather than putting all field help into the screen tooltip.

Demonstration · Edit a control label, help and display format in context

Open	Who acts
Screens → selected screen → Fields / Controls → selected control	Control author and eligible reviewer

A field’s visible label, help and display format belong to its control definition. They must not be edited as disconnected label records.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Control identity / kind	Inspect the selected field, action or column	Keep the stable identity fixed when changing presentation.
Label	A clear business-facing name	Use the visible meaning; avoid technical IDs as user text.
Help text	Explain what to enter or what an action does	Field help is separate from the screen-level tooltip.
Display format	An offered compatible format	Formatting does not alter the underlying value or grant write access.
Change reason	The reason for the presentation change	Retain enough detail for an independent decision.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Open the control under its owning screen and inspect current presentation.	The control kind and field binding can be checked.
2	Edit label/help/format and enter the reason.	The proposed wording remains tied to the same control.
3	Submit the change and inspect Changes & Approvals on that record.	Pending values are visible for comparison.
4	The reviewer approves or rejects the exact revision.	The decision applies only to that proposed presentation.
5	Reopen the consuming screen under the intended functional profile.	Approved wording appears where that control is rendered.
6	Repeat with a profile lacking update permission.	A new label has not granted new business authority.

Evidence to show before continuing

Show the label in its owner workspace and rendered business context, plus one permission-restricted action.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A control has no suitable stable identity	Resolve its registration with the screen owner before proposing a misleading match.
The business action is denied after a label change	Inspect IAM control/action authority; presentation review does not add permissions.

Next part of the demonstration

Inspect the control history or continue to source-bound screen authoring.

CHAPTER 6

Demonstration · Create a source-bound screen and explain every setup field

Open	Who acts
Screens → Create Screen → Screen Details	Screen author

Define a new business screen using an approved source, an intentional layout and a clear place in navigation.

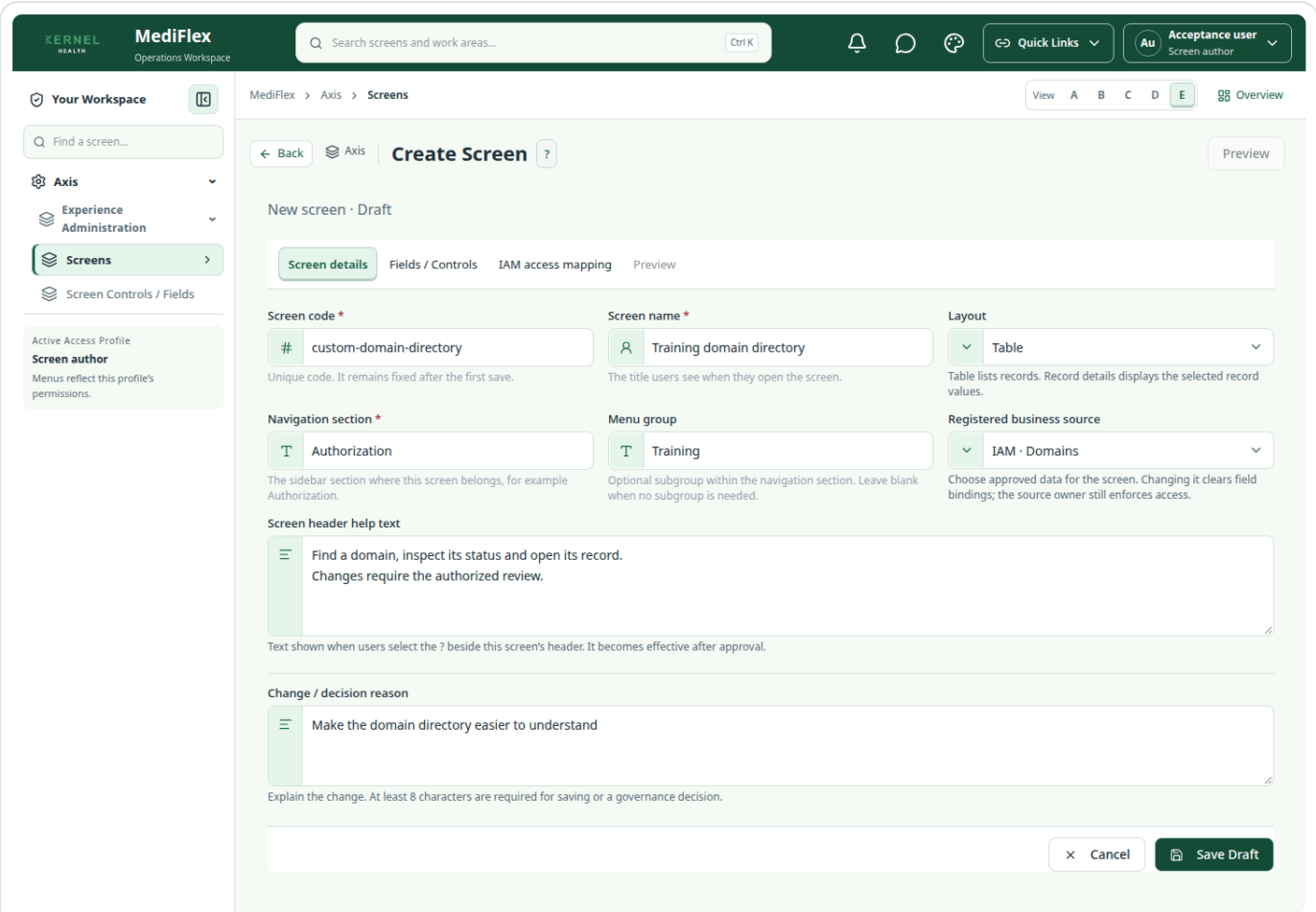
Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Screen code	A unique code such as custom-domain-directory	The code must start custom- and remains fixed after the first save; it is not the display title.
Screen name	Training Domain Directory	The user-facing screen title.
Screen header help text	Explain purpose, scope and how to use the screen	This multiline field supplies the question-mark tooltip. It saves through the existing screen description metadata and becomes effective after approval.

Input shown on screen	Enter or select	Explain its significance
Layout	Table or Record details	Table presents multiple rows; Record details presents one selected record. This does not create arbitrary drag-and-drop layouts.
Navigation section	Enter the intended sidebar section, for example Authorization	Use the existing section wording deliberately; spelling variants can fragment navigation.
Menu group	An optional subordinate grouping	Use only when related screens need a subgroup under the section; otherwise leave blank.
Registered business source	Choose the approved IAM Domains source if offered	Supplies typed readable fields; its owner continues to enforce access.
Change / decision reason	Explain why the new screen is needed	At least 8 characters are required for the governed save/submission path.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Open Create Screen and enter unique code, name and purpose.	The new definition is identifiable without affecting an existing screen.
2	Choose Table for a directory or Record details for a selected-record view.	The layout matches the intended user task.
3	Set the navigation section and optional menu group deliberately.	The proposed navigation location can be explained.
4	Select an eligible registered business source.	Its typed fields become available for binding.
5	Save Draft and reopen it before continuing.	The same screen reference and saved source are retained.
6	Open Fields / Controls and then IAM Access Mapping.	Composition and access are configured explicitly before preview/publication.



Create Screen: the dedicated header-help textarea, shared fields and Cancel/Save footer · application capture with illustrative records; select to enlarge.

Evidence to show before continuing

Show the saved source, layout and sidebar location and explain their separate meanings.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
No sources are offered	Check the source catalog, selected profile and source-owner read permission.
The source is changed after field selection	Recheck all field bindings; source changes clear incompatible bindings.

Next part of the demonstration

Configure child fields and explicit page/control mappings, then preview the saved draft.

Demonstration · Add fields and map existing IAM permissions

Open	Who acts
Selected authored screen → Fields / Controls; IAM Access Mapping	Screen author and IAM administrator

Bind controls to source fields and existing permissions so publication does not accidentally expose data or create grants.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Source field / control label	Choose the typed field and readable label	The source field identifies data; the label identifies presentation.
Control order / format	An offered position and compatible format	Reordering does not change the stable binding.
Page / control permission	Select the intended existing IAM references	An Axis mapping links the check; the role must separately hold the grant.
Menu mapping	The intended screen/menu bridge	Navigation visibility and backend read authority must both pass.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Add the needed source fields to the saved screen.	Each control has a single owner and compatible source binding.
2	Order the controls and provide labels/help.	The preview can be understood without technical field keys.
3	Select the existing page/control permission references.	Every required access boundary is explicit.
4	Inspect the proposed menu/screen bridge and selected permissions.	No role grants are inferred from publication.
5	Save and preview as the intended author, then verify using the functional profile after publication.	The source owner still filters accessible data.

Evidence to show before continuing

Show control/source binding, permission reference and the separate effective role grant.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A permission is unavailable	Create/review it through IAM or select an eligible existing reference; do not invent a string.
The menu exists but read is denied	Check page permission, role/profile relationships and current ABAC context.

Next part of the demonstration

Submit and decide the exact saved screen revision on its owning record.

CHAPTER 8

Demonstration · Preview, review, publish and revise without losing authority

Open	Who acts
Selected screen → Preview; Changes & Approvals; mapping context	Author, responsible owner where required, independent reviewer

A preview proves a saved configuration can be read; independent review and publication control which revision becomes effective.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Saved revision / preview	The exact draft being submitted	A preview of older unsaved values is not current evidence.
Responsible role	The eligible owner for a mapping workflow	Does not grant that role new APIs.
Decision reason	What the reviewer accepted or rejected	A stale revision must be reloaded before decision.
Published version	The resulting effective screen/experience	Keep this reference for consumer readback and supported restoration.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Save the draft and preview its source-bound presentation.	The fields, labels and layout match the saved revision.

Evidence to show before continuing

Show preview, on-record decision, effective rendering and a rejected/stale case.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
Inventory changed during review	Refresh the source/mapping and resubmit the current revision.
An ordinary maker switches to checker in the same account	Subject independence still applies; use the explicitly supported administrator exception only where that flow recognizes it.

Next part of the demonstration

Verify the actual business screen with its functional profile and retain the published reference.

CHAPTER 9

Additional demonstration · Access, prerequisites and example values

Select a non-production screen already in trusted inventory, its current source version and an eligible owner role. Use author, owner-confirming and independent-review identities as required. Prefer a small label/format change for a walkthrough; retain the current published version so that comparison and supported restoration are possible.

Input / choice	Example or selection	Meaning / check
Screen / source version	Existing authorized screen and current inventory version	Choose the exact source. A copied name does not connect a new draft to trusted inventory.
Responsible Role	A role eligible to own the selected mapping	Choosing a role does not grant its members new API permissions.
Component / permission reference	Existing stable control identity and registered IAM permission	A catalog match identifies a reference; it does not certify the complete behavior.
Locale / label value	An eligible locale and clear business-facing wording	Keep a label change separate from semantic meaning or security identity.
Change reason	Inspect the user problem and expected presentation	The owner/reviewer needs enough detail to compare the source and proposed mapping.
Experience / delivery	Returned version, handoff and output references	Approval, generation and activation each have their own evidence.

Use assigned profiles for the stated responsibilities. If a menu is absent, inspect the selected domain/profile and ask the access administrator to check its mappings. Do not substitute a broad administrator profile. If an action is unavailable, check state, current revision and reviewer eligibility.

CHAPTER 10

Additional demonstration · Configure and publish a screen experience

Use this route when you need to configure and publish a screen experience.

- 1. Inspect a screen and its linked records
- 2. Create or revise a mapping
- 3. Change labels and publish an experience
- 4. Generate and activate a delivery

CHAPTER 11

Additional demonstration · Step 1 · Inspect a screen and its linked records

Before you act	Required context
Screen / entry	Screens → selected screen and linked records
Who acts	Screen administrator
You need	Select a non-production screen already in trusted inventory, its current source version and an eligible owner role. Use author, owner-confirming and independent-review identities as required. Prefer a small label/format change for a walkthrough; retain the current published version so that comparison and supported restoration are possible.

Steps and field guidance

Before you start: Select a profile with screen inventory access.

- 1. Open Screens, search for the required screen and expand its row.
- 2. Inspect component and permission-reference counts, the screen mapping and owner/independent reviews.
- 3. Open the specific mapping or review you intend to inspect; read the record title and status.
- 4. Use Back to return to the parent. Do not keep opening the same related-record link expecting it to advance the workflow.

You understand which record is the screen, which is its mapping and which is the decision record.

SCREEN 1

Experience version history

Retained application capture · illustrative records · earlier UI may differ · select image to enlarge

KERNEL HEALTH

MediFlex

Operations Workspace

Search screens and work areas...

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A

AXIS_UX_TEST_9fed4fc7b4b...

AXIS acceptance author

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Users

Domains

Sign-In History

Failed Sign-In Attempts

Active Sessions

Session History

Account Settings

SSO Providers

SSO Identities

Credential Recovery

RBAC Administration

Profiles

Roles

Menu Access

User Assignments

User Access Hierarchy

Screens

MediFlex > Applications > Experience Versions

Axis · Experience Versions

Refresh

Search all matching records...

Screen	Profile	Locale	Version	Status
Security Officer Dashboard	All Profiles	en-IN	2	Invalidated by Change
Security Officer Dashboard	Security Officer — Client Demo	en-IN	1	Retired
Security Officer Dashboard	All Profiles	en-IN	1	Invalidated by Change
Locale	Axis Acceptance author	en-IN	2	Retired
Locale	Axis Acceptance author	en-IN	1	Retired
Locale	All Profiles	en-IN	31	Retired
Locale	All Profiles	en-IN	30	Retired
Locale	All Profiles	en-IN	29	Retired
Locale	All Profiles	en-IN	28	Retired
Locale	All Profiles	en-IN	27	Retired

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▶ How It Works

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 12

Additional demonstration · Step 2 · Create or revise a mapping

Before you act	Required context
Screen / entry	Screen Mapping Drafts → Mapping Reviews
Who acts	Mapping author, responsible owner and independent reviewer
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Before you start: The current screen inventory exists and has a designated owner.

- 1. Open Screen Mapping Drafts or the screen's mapping action.
- 2. Select Screen, source version and Responsible Role; enter the change reason.
- 3. Inspect components and permission references for the actual screen behavior.
- 4. Save and submit the mapping, then complete the owner-confirmation step.
- 5. A different eligible reviewer opens Mapping Reviews and records the independent decision.

The mapping has attributable owner and independent review against its exact source inventory.

SCREEN 2

Mapping Reviews: submitted revision, responsible role and approved/withdrawn history

Retained application capture · illustrative records · earlier UI may differ · select image to enlarge

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MediFlex
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Search screens and work areas...

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🔔

💬

🔗 Quick Links

👤 Switch Profile

NS

Native security checker

Axis independent review

Your Workspace

Mapping Reviews

Dashboard

Core

Axis 1

Mapping Reviews

ACTIVE ACCESS PROFILE

Axis independent review

Menus reflect this profile's permissions.

MediFlex > Applications > Mapping Reviews

Axis · Mapping Reviews

Refresh

All statuses

Filters 1 active

Clear All

4 records

Screen: Label Change History

Search...

Screen	Review Status	Responsible Role	Submitted By	Mapping Revision
Label Change History	Approved for Publication	Axis ownership review	Native platform regression	4
Label Change History	Withdrawn	Axis ownership review	Native platform regression	4
Label Change History	Withdrawn	Axis ownership review	Native platform regression	4
Label Change History	Withdrawn	Axis ownership review	Native platform regression	4

▶ How It Works

Kernel · Demo walkthrough

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Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 13

Additional demonstration · Step 3 · Change labels and publish an experience

Current screen model: open a screen record first, then use **Screen details** and **Fields / Controls** within that record. The Controls entry lists owning screens before showing their controls. Existing registered screens and newly authored screens are managed through the same screen workspace.

1. **Open the owning screen.** Go to System Access → Experience Administration → Screens. Search for an approved example such as Country. Select Open screen on that row. Confirm the title and Screen code before changing anything.
2. **Inspect screen presentation.** In Screen details read Screen title and Help text. Select Edit Presentation, enter the proposed values and a clear Change / decision reason, then submit for review. Pending values must not immediately replace the approved title or help.
3. **Inspect its controls.** Select Fields / Controls. Only this screen's fields and actions should appear. Open the intended row with Edit presentation; inspect its stable code, kind and current presentation.
4. **Propose the control change.** Edit Control label, Help text and the offered display format. Enter the reason and submit. Remain in the same screen context; its row shows the pending control change.
5. **Review on this record.** The eligible checker opens this screen and the pending control row, inspects before/after and the exact revision, enters the decision reason and selects Approve or Reject. Standard contributors cannot approve their own proposal.
6. **Verify the result.** Refresh the original screen. Confirm the approved label/help and retained history. Refresh or reopen the original business screen to verify the resulting presentation. Back returns to the owning screen list; refresh preserves the selected screen.

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Q

Search screens and work areas...

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Acceptance user

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Find a screen...

Axis

Experience Administration

Screens

Screen Controls / Fields

Active Access Profile

Screen author

Menus reflect this profile's permissions.

MediFlex > Axis > Screens

View

A

B

C

D

E

Overview

← Back

Axis

Country — Country name

Country · field:country:name

Control label *

T Country display name

Help text

≡ Configured control help

Display format

▼ TEXT

Change / decision reason

T Make the country field wording clear

Submit For Review

Control label change on the owning screen · application rendered with illustrative test records; select to enlarge.

CHAPTER 14

Additional demonstration · Step 4 · Generate and activate a delivery

Before you act	Required context
Screen / entry	Experience versions → generation / delivery
Who acts	Authorized publisher and delivery operator
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Before you start: The exact input version is approved and the generation operator has access.

1. Open Generation Handoffs and choose the eligible approved version.
2. Submit generation and retain the handoff reference.

Kernel · Demo walkthrough

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- 3. Inspect Dynamic Screen Deliveries for status, output identity and errors.
- 4. Use the offered activation action only when current approval and artifact checks pass.
- 5. Open the resulting screen using an intended business profile and verify its menu, fields and actions.

The delivery is tied to approved source authority; generation does not create extra IAM grants.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 15

Additional demonstration · Resolve an invalidated mapping review

Use this route when you need to resolve an invalidated mapping review.

- 1. Recover an invalidated review

CHAPTER 16

Additional demonstration · Step 1 · Recover an invalidated review

Before you act	Required context
Screen / entry	Mapping Reviews → source revision / history
Who acts	Mapping author and independent reviewer
You need	Select a non-production screen already in trusted inventory, its current source version and an eligible owner role. Use author, owner-confirming and independent-review identities as required. Prefer a small label/format change for a walkthrough; retain the current published version so that comparison and supported restoration are possible.

Steps and field guidance

Before you start: The page reports source/inventory drift.

- 1. Open the affected mapping and read the invalidation reason.
- 2. Refresh or revise the draft from current screen inventory.
- 3. Compare changed components, labels and permission references.

4. Resubmit and repeat the required owner and independent decisions.

The current mapping is reviewed without reusing a stale approval.

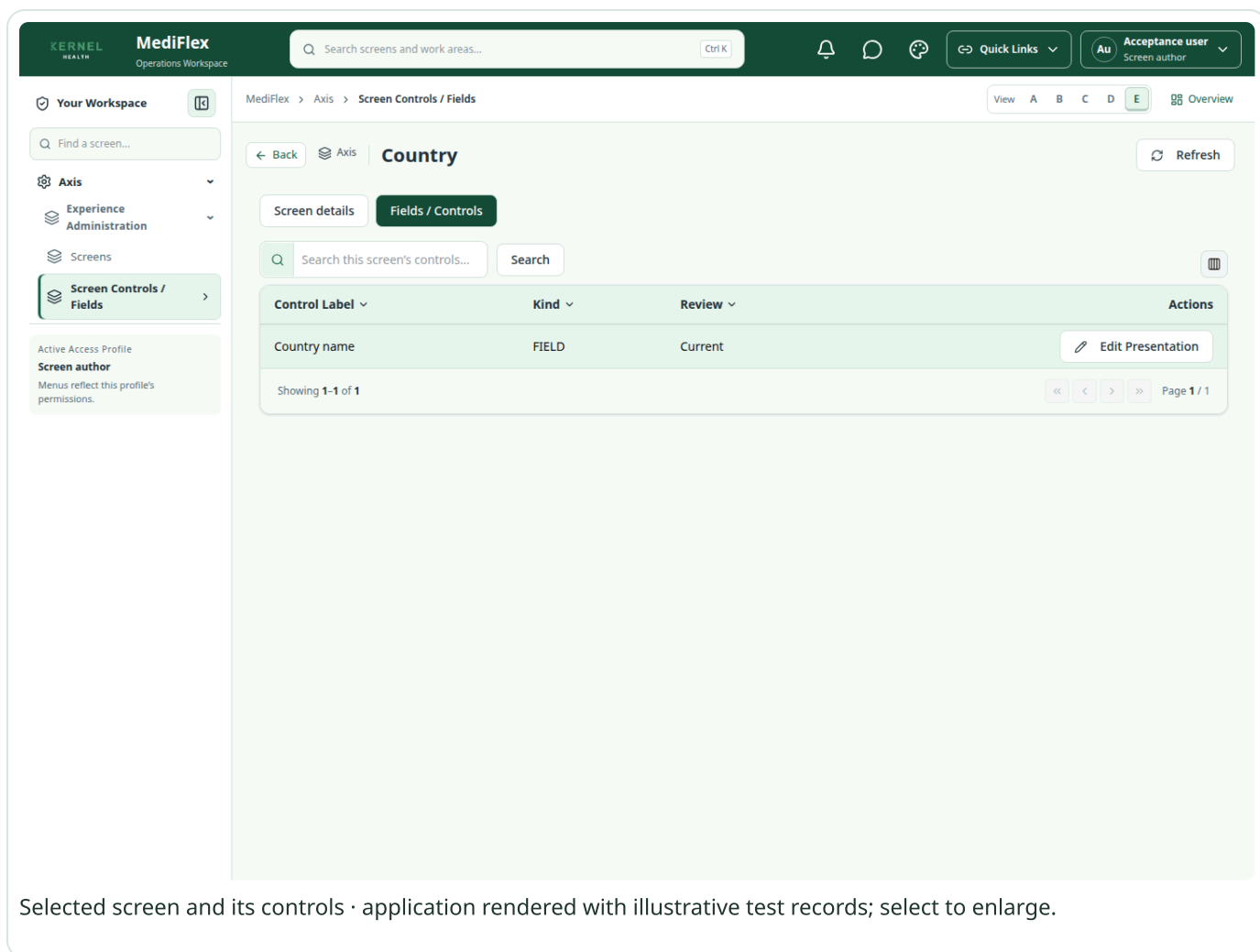
Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 17

Additional demonstration · Demonstration · Screen details and field labels

Prepare: an authorized screen author, a separate eligible reviewer and an approved screen with at least one control. Use example records. Expected result: an approved presentation change with the same stable screen/control identity.

1. **Open the owning screen.** Go to System Access → Experience Administration → Screens. Search for an approved example such as Country. Select Open screen on that row. Confirm the title and Screen code before changing anything.
2. **Inspect screen presentation.** In Screen details read Screen title and Help text. Select Edit Presentation, enter the proposed values and a clear Change / decision reason, then submit for review. Pending values must not immediately replace the approved title or help.
3. **Inspect its controls.** Select Fields / Controls. Only this screen's fields and actions should appear. Open the intended row with Edit presentation; inspect its stable code, kind and current presentation.
4. **Propose the control change.** Edit Control label, Help text and the offered display format. Enter the reason and submit. Remain in the same screen context; its row shows the pending control change.
5. **Review on this record.** The eligible checker opens this screen and the pending control row, inspects before/after and the exact revision, enters the decision reason and selects Approve or Reject. Standard contributors cannot approve their own proposal.
6. **Verify the result.** Refresh the original screen. Confirm the approved label/help and retained history. Refresh or reopen the original business screen to verify the resulting presentation. Back returns to the owning screen list; refresh preserves the selected screen.



Negative checks: reject a second label proposal; confirm the approved label remains. Attempt a stale review after another revision; reload rather than approving the old values. Use a profile lacking control permission and confirm the tab/action is unavailable.

CHAPTER 18

Additional demonstration · Demonstration · Create a governed screen

Prepare: one approved business source and existing eligible navigation/page/control permissions. Use a unique example screen code and synthetic records.

1. Open Screens → Create Screen using a profile with authoring permission. Enter a unique Screen code and business-facing Screen name.
2. Enter Description, choose Table or Record details, enter the agreed Navigation section and optional Menu group. Use the field reference below to distinguish the fields.
3. Choose a Registered business source. In Fields / Controls add the declared fields, labels and offered formats in the desired order. Changing the source requires rechecking every field binding.
4. In IAM Access Mapping choose valid existing navigation, page and control permission references. Confirm the intended role/profile already has, or separately receives, approved grants.

5. Enter Change / decision reason, Save Draft and reopen the saved revision. Preview the current authorized records and field layout.
6. Submit the exact draft for review. The eligible reviewer decides the pending change on its owning screen record. After approval/publication, verify the permission-based menu and open the new screen.
7. Test a profile without the required permission. It must not gain menu or page access merely because the screen was published.

Field	What to enter / expected behavior
Screen code	Unique technical code for a newly authored screen. It becomes fixed after the first save. Existing screen codes identify the published owner; do not rename them to change a title.
Screen name / Screen title	The business-facing heading. For an existing screen, change Screen title through Edit Presentation and submit a reason.
Screen header help text	Multiline screen-level guidance shown behind the question mark beside the header. It saves through the existing screen description metadata and becomes effective after approval. A control's Help text belongs to that control.
Layout	Table displays the configured fields as columns; Record details displays them as a record. This selects a renderer for an authored screen; it does not change the entire application theme.
Navigation section	The parent sidebar section for the authored screen, for example Operations. Use the agreed business section consistently.
Menu group	Optional subgroup beneath the section, for example Reference data. Leave empty when no subgroup is needed. It does not grant access.
Registered business source	An approved server operation supplying records and its declared fields. Choose a source appropriate to the task. This is not a connection string or a place to enter SQL. The source's owner still enforces access.
Source field	Declared field from the selected business source. Changing the source clears incompatible field bindings.
Control label / Help text / Display format	Presentation values for the selected owning screen's control. Use its stable identity; a renamed label does not create a new permission.
Change / decision reason	Explain the business reason for saving, submitting or deciding the exact revision.
IAM Access Mapping	Select existing authorized navigation, page and field/control permission references. Defining a screen does not create role grants.
Active / Include inactive	Inactive configuration remains available for permitted historical inspection. Approval state and active state are separate.

Next: return to IAM Menu Access to inspect the menu bridge and role grants, then verify the screen using the intended functional profile.

CHAPTER 19

Cross-module handoffs and the record references to retain

Next module	What to carry across	Open the related demonstration
IAM	Map existing menu/page/control permissions; grant them to roles separately.	<u>IAM</u>
Vista	Use governed data modeling for reporting; a screen source is its own registered contract.	<u>Vista</u>
Regulix	Follow required owner/independent review with the exact submitted revision.	<u>Regulix</u>

CHAPTER 20

Problem → responsible action → safe continuation

Procedure	Observed problem	Recovery
Open the owning screen and inspect its controls	The screen list loads but Create options fail	Retain the failing request/correlation and retry after the service correction; a partial list is not proof all editor dependencies loaded.
Open the owning screen and inspect its controls	The tab is unavailable	Check the separate control permission; screen read alone does not authorize control maintenance.
Maintain the screen title and header help	The rendered wording remains old	Check approved/effective state, correct screen identity and refresh after publication.
Maintain the screen title and header help	The proposal was rejected	Read its reason; the previous approved wording should remain current.
Edit a control label, help and display format in context	A control has no suitable stable identity	Resolve its registration with the screen owner before proposing a misleading match.
Edit a control label, help and display format in context	The business action is denied after a label change	Inspect IAM control/action authority; presentation review does not add permissions.
Create a source-bound screen and explain every setup field	No sources are offered	Check the source catalog, selected profile and source-owner read permission.

Procedure	Observed problem	Recovery
Create a source-bound screen and explain every setup field	The source is changed after field selection	Recheck all field bindings; source changes clear incompatible bindings.
Add fields and map existing IAM permissions	A permission is unavailable	Create/review it through IAM or select an eligible existing reference; do not invent a string.
Add fields and map existing IAM permissions	The menu exists but read is denied	Check page permission, role/profile relationships and current ABAC context.
Preview, review, publish and revise without losing authority	Inventory changed during review	Refresh the source/mapping and resubmit the current revision.
Preview, review, publish and revise without losing authority	An ordinary maker switches to checker in the same account	Subject independence still applies; use the explicitly supported administrator exception only where that flow recognizes it.

CHAPTER 21

Close the demonstration and hand over the operating guide

Return to the final owning record and show its actual result. Retain the exact references for creation, decision, publication, execution and output that this module produced. Explain any unresolved dependency as a specific blocker; do not convert a source-level example into a claim of a completed hosted journey.

Procedure	Evidence the audience should have seen
Open the owning screen and inspect its controls	Show one owning screen, its details and its child controls through refresh and Back.
Maintain the screen title and header help	Show current/pending comparison, decision and the actual rendered tooltip.
Edit a control label, help and display format in context	Show the label in its owner workspace and rendered business context, plus one permission-restricted action.
Create a source-bound screen and explain every setup field	Show the saved source, layout and sidebar location and explain their separate meanings.
Add fields and map existing IAM permissions	Show control/source binding, permission reference and the separate effective role grant.
Preview, review, publish and revise without losing authority	Show preview, on-record decision, effective rendering and a rejected/stale case.

Keep the training data and audit trail until the agreed review is complete. Use only supported inactivation/retirement actions when authorized; do not erase evidence to reset the demonstration. Hand over the separate user manual for daily operation and record actual results in the UAT pack.