

**Allowable Values Management**

**User Guide**

**24.1**



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## About this Manual

**Purpose** The user guide introduces you to Allowable Values Management application and its environment. It includes an overview of the system and its components. It also describes navigation to various pages of the application.

**Target Audience** The user guide is aimed for business and technical users.

**Contents of this Guide** This guide consists of the following sections:

Section	Description
Log on to AVM System	Describes the steps to log on to the AVM application
Page Elements	Describes the various page elements of the AVM application
Navigation	Illustrates the steps to navigate to various pages of the AVM application
Setting Application Information	Illustrates the steps to create a new application and maintain existing applications
Setting Environment Information	Explains the steps to create a new environment and maintain existing environments
Application Environment Association	Describes the steps to associate an application and an environment
Maintaining Allowable Values	Explains the steps to create and maintain fields and their allowable values
Maintaining Application Pages	Describes the steps to create a new page and maintain existing pages
Maintaining Application Projects	Illustrates the steps to create a new project and maintain existing projects

## Introduction

### Overview

Allowable Values Management (AVM) is a web-based application supporting entry and maintenance of allowable values for fields defined for multiple applications and environments.

Allowable values are the valid values processed by fields of an application. These values are displayed in a dropdown list in the applications. The applications contain numerous variables that are user-defined and stored as codes in the database. AVM allows these values to be with their associated description.

AVM can be accessed in a stand-alone mode or through a link from each application that is defined within AVM. These application access the allowable values stored in the AVM database through the AVM API in real-time mode.

For each application, AVM supports a base environment of allowable values. Base environment cannot be changed. To maintain allowable values, a new environment must be created. All new environments have the base environment data which can be modified. You can also add new fields in these environments.

AVM also allows you to promote or export allowable values from one environment to another.

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### Features

AVM provides the following features:

- easy integration with any product
- easy accessibility and maintenance
- role based access
- audit trail
- import/export environment settings

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### Components

AVM consists of the following components:

#### Applications

The application to which the allowable values apply. The following applications are predefined with AVM:

- PerformancePlus
- Product Wizard
- Wealth Management Accelerator

You can also add new applications.

### **Environment**

An environment allows you to maintain different versions of the AVM database. You can define multiple environments for an application. All applications have a base environment associated. The allowable values in base environment cannot be changed. To change allowable values, you can create a new environment and clone/update the values.

You can also promote changes from one environment to another.

### **Pages**

Allowable values are accessed through pages in applications. You can define these pages and vary the allowable values by pages.

### **Projects**

It is a collection of related changes to the AVM database. Projects synchronize the AVM database across multiple environments through promotion. It is recommended that same changes are not made under multiple projects.

# Log On to AVM System


## Logging on to AVM

The Login page is used to sign in to the AVM application. You require a valid user name and password. If you enter a valid user name and password, the home page is displayed otherwise the following message is displayed:

*Invalid User Name and/or Password*

If you select the Allowable Values option from within an application that supports AVM, the Login page is not displayed; you navigate to the home page directly.

## Login page



ALLOWABLE  
VALUES **MANAGEMENT**

AV-23.1 FEBRUARY 28 2023 @ 0859

Please enter your User Name and password.

User Name:

Password:


Log In

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Use the following steps to log on to AVM:

Step	Action
1	Open the AVM web application
2	Enter the User Name and Password
3	Click <i>Log In</i>
Result	
The AVM home page is displayed	

## Logging Off

To log off from the AVM application, click .

## Page Elements

### Overview

The AVM pages include the following elements:

- title
- menu bar
- filter criteria panel
- list area
- action buttons

### *Title*

The title area is a quick reference to the general function associated with the current page.

### *Menu Bar*

The menu bar lets you navigate to various functions of AVM. Refer to the section [Menu Bar Options](#) for more details.

### *Filter Criteria Panel*

The filter panel allows you to search records based on a search criteria.

### *List Area*

The list area displays a list of available records. You can select a record from the list and perform the required function.

### *Action Buttons*

Action buttons on each page lets you select options that are appropriate for the current page.

Button	Description
Process	When you click <b>Process</b> , the changes made on the page are saved in the database
Add	When you click <b>Add</b> , the system navigates you to the add record page. The fields of the add page are empty
Maintain	When you click <b>Maintain</b> , the system navigates you to the record maintenance page. The fields are displayed with current values from the database
Cancel	When you click <b>Cancel</b> , the system does not save changes made to the fields and navigates back to the index page or the previous page
Reset	When you click <b>Reset</b> , the page is returned to its initial condition (before you entered data). In case of an Add function, all fields are initialized. For a Maintenance function, all fields are refreshed with data from the database
Delete	When you click <b>Delete</b> , the system deletes the current record



## Navigation

### Overview

The AVM application comprises of different pages. You can navigate to these pages from the menu bar. You can access multiple pages from these pages.

### Menu Bar Options

The menu bar includes the following options:

Menu	Description
Allowable Values	<ul style="list-style-type: none"> <li>• navigates you to the Application Environment Selection page, and then to Allowable Field Index page</li> <li>• allows you to view, add, and edit existing fields and their allowable values</li> </ul>
Application/Environment	<ul style="list-style-type: none"> <li>• navigates you to the Application Environment Index page</li> <li>• displays a list of existing applications and environments</li> <li>• allows you to view, add, and maintain existing application environment associations</li> </ul>
Application	<ul style="list-style-type: none"> <li>• navigates you to the Application Index page.</li> <li>• allows you to view, add, and maintain existing applications</li> </ul>
Environment	<ul style="list-style-type: none"> <li>• navigates you to the Environment Index page.</li> <li>• allows you to view, add, and maintain existing environments</li> </ul>
Page	<ul style="list-style-type: none"> <li>• navigates you to the Page Index page.</li> <li>• allows you to view, add, and maintain existing pages</li> </ul>
Project	<ul style="list-style-type: none"> <li>• navigates you to the Project Index page.</li> <li>• allows you to view, add, and maintain existing projects</li> </ul>

## Setting Application Information

### Overview

The Application in AVM is the application to which the allowable values apply. AVM is delivered with the following pre-defined applications:

- Product Wizard - PW
- PerformancePlus - PPLUS
- Wealth Management Accelerator - wmA

The Application Index page is used to display and maintain applications in AVM. All applications have an associated base environment. When an application is successfully defined, AVM creates a base environment and associates it with the application.

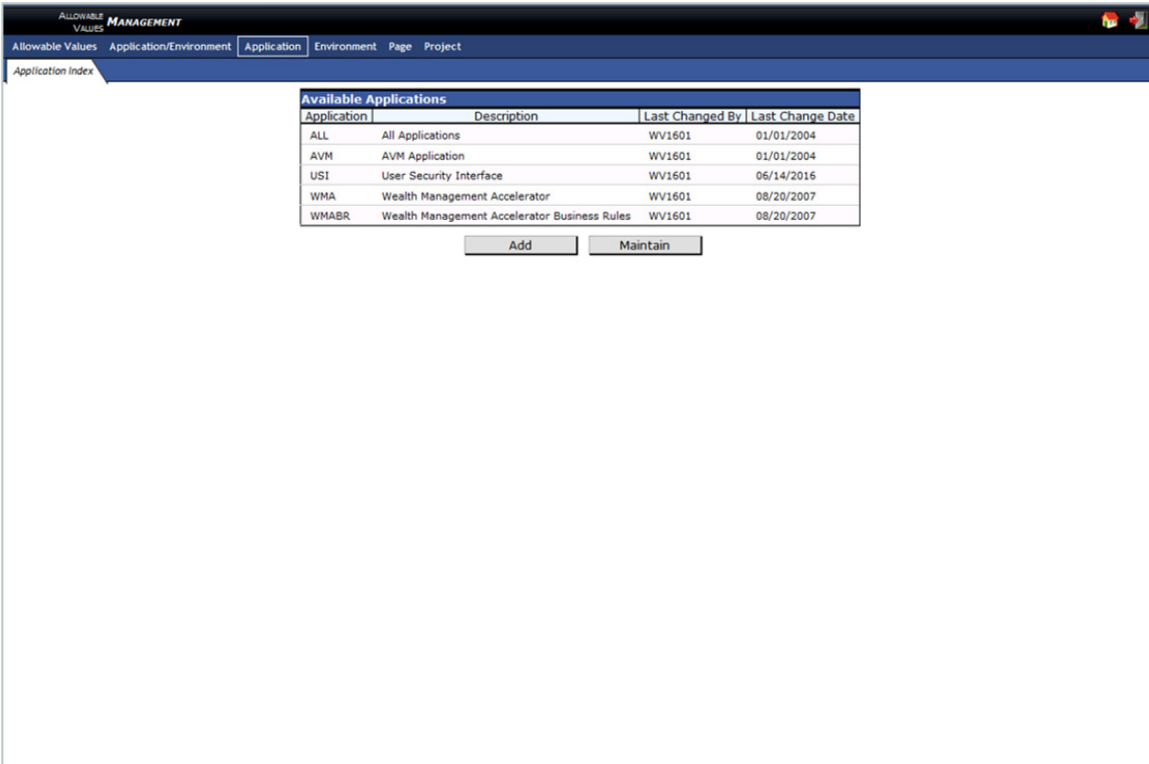
This section describes how to:

- add a new application
- maintain existing applications

### Navigation

On the menu bar click Application to access the Application Index page.

### Application Index page



The screenshot displays the 'Application Index' page within the 'ALLOWABLE VALUES MANAGEMENT' application. The page features a menu bar with options: Allowable Values, Application/Environment, Application, Environment, Page, and Project. The 'Application' menu is currently selected. Below the menu bar, the 'Application Index' tab is active. The main content area contains a table titled 'Available Applications' with the following data:

Application	Description	Last Changed By	Last Change Date
ALL	All Applications	WV1601	01/01/2004
AVM	AVM Application	WV1601	01/01/2004
USI	User Security Interface	WV1601	06/14/2016
WMA	Wealth Management Accelerator	WV1601	08/20/2007
WMABR	Wealth Management Accelerator Business Rules	WV1601	08/20/2007

Below the table, there are two buttons: 'Add' and 'Maintain'.

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## Field Description

Available Applications (list)  
Lists all application defined within AVM  
The list displays the following information:

- Application
- Description
- Last Changed By
- Last Change Date

---

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Add	Navigates you to the Application Information page (add mode)  <b>Note:</b> This button gets enabled only if you have access rights to add an application.
Maintain	Navigates you to the Application Information page (maintain mode)

## Adding Application Information

### Overview

The add process allows you to create a new application in AVM. After successful addition of a new application, a base environment record is created in the Application/Environment table.

Step	Action
1	On the Application Index page, click Add
<b>Result</b>	
The Application Information page (add mode) is displayed	
2	Enter the Application name and description
3	Click Process
<b>Result</b>	
The application is defined in the AVM database	

### Application Information page (add mode)

The screenshot shows the 'Application Information' page in 'add mode'. The page has a blue header bar with the title 'ALLOWABLE VALUES MANAGEMENT' and a sub-header 'Application Information'. Below the header, there are tabs for 'Allowable Values', 'Application/Environment', 'Application', 'Environment', 'Page', and 'Project'. The 'Application' tab is selected. The main content area contains a form with the following fields:

- Application:** A text field with a red asterisk indicating it is required.
- Description:** A text field with a red asterisk indicating it is required.
- Last Changed By:** A text field.
- Last Change Date:** A text field.

At the bottom of the form, there are two buttons: 'Process' and 'Cancel'.

### Field Descriptions

- Application** (text, 15 positions, alphanumeric, required)  
Enter the name of the application.
- Description** (text, 60 positions, alphanumeric, required)  
Enter the description of the associated application.

**Last Changed By** (field)  
Displays the ID of the user who updated the application last time. The system automatically sets the value of this field as the ID of the user editing or adding the application. The field is empty in add mode and cannot be edited in maintain mode.

**Last Change Date** (field)  
Displays the date when the application was updated last time. The system automatically sets the value of this field as the date when the application is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Adds a new application to the database
Cancel	Cancels the additions and navigates to the Application Index page

## Maintaining Application Information

### Overview

You can edit the application name and its description. If you do not have access rights to update the application information, all the fields on the page are disabled.

Step	Action
1	On the Application Index page, select the application to be updated from the Available Application list
2	Click <i>Maintain</i>
<b>Result</b>	
The Application Information page (maintain mode) is displayed	
3	Modify the Application or its Description
4	Click <i>Process</i>
<b>Result</b>	
The selected application is updated	

### Application Information page (maintain mode)

The screenshot displays the 'Application Information' page in maintain mode. The page has a blue header with the title 'Allowable Values MANAGEMENT' and a navigation bar with tabs: 'Allowable Values', 'Application/Environment', 'Application', 'Environment', 'Page', and 'Project'. The 'Application' tab is selected. Below the navigation bar, the 'Application Index' page is visible in the background. The 'Application Information' form is in the foreground, showing the following fields:

- Application:** A text field containing 'USI'.
- Description:** A text field containing 'User Security Interface'.
- Last Changed By:** A text field containing 'WV1601'.
- Last Change Date:** A text field containing '06/14/2016'.

At the bottom of the form, there are two buttons: 'Process' and 'Cancel'.

### Field Descriptions

**Application** (text, 15 positions, alphanumeric, required)  
Displays the name of the application. You can modify the application name, as required.

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Description	(text, 60 positions, alphanumeric, required) Displays the description of the associated application. You can modify the description, as required.
Last Changed By	(field) Displays the ID of the user who updated the application last time. The system automatically sets the value of this field as the ID of the user editing or adding the application. The field is empty in add mode and cannot be edited in maintain mode.
Last Change Date	(field) Displays the date when the application was updated last time. The system automatically sets the value of this field as the date when the application is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Update the changes to the database
Cancel	Cancel the changes and navigates to the Application Index page

## Setting Environment Information

### Overview

An environment is a virtual application with a different set of data. You can create multiple environments of an application and each environment can be used for a different purpose.

The Environment Index page is used to view and maintain environments of an application. When you create a new application, AVM automatically creates a base environment. You can create an environment based on the base environment.

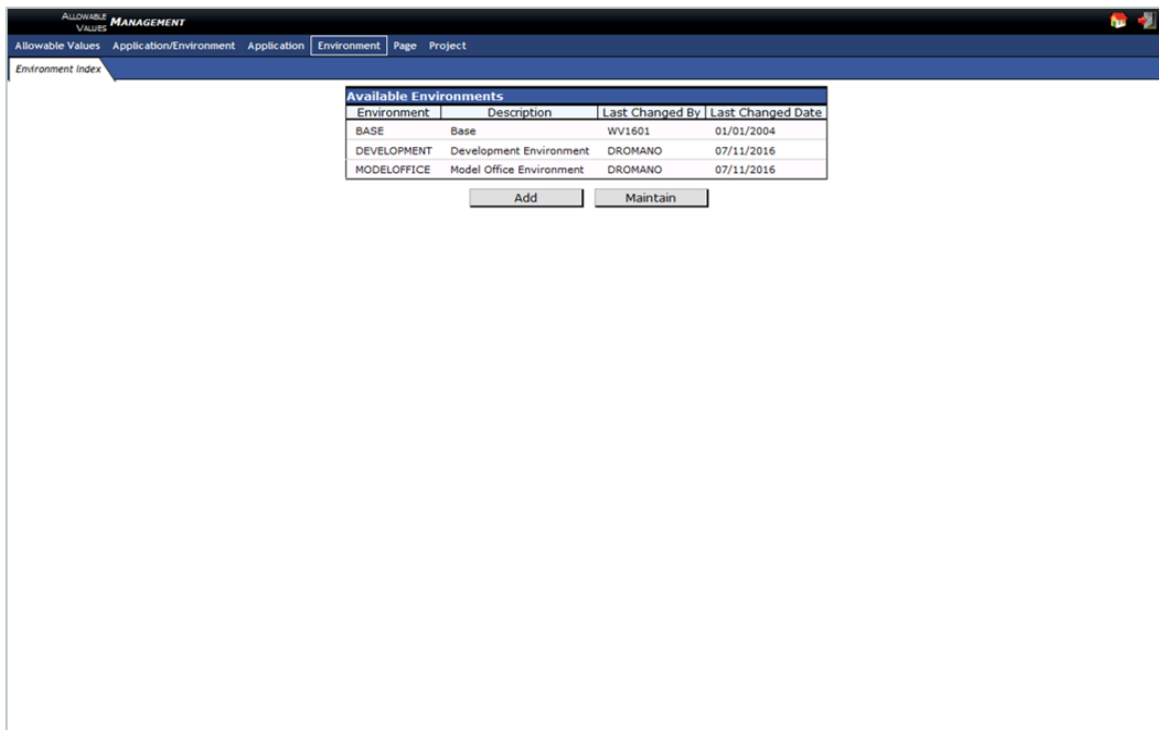
This section describes how to:

- add a new environment
- maintain existing environments

### Navigation

On the menu bar click *Environment* to access the Environment Index page.

### Environment Index page



Available Environments			
Environment	Description	Last Changed By	Last Changed Date
BASE	Base	WV1601	01/01/2004
DEVELOPMENT	Development Environment	DROMANO	07/11/2016
MODELOFFICE	Model Office Environment	DROMANO	07/11/2016

### Field Description

- Available Environments (list)
- Lists all the environments defined within AVM. The list displays the following information:
- Environment
  - Description



- Last Changed By
- Last Changed Date

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Add	Navigates to the Environment Index page (add mode) to create a new environment for an application
Maintain	Navigates to the Environment Index page (maintain mode) where you can edit the environment name and its description

## Adding Environment Information

### Overview

The add process allows you to create a new environment for an application.

Step	Action
1	On the Environment Index page, click Add  <b>Note:</b> The Add button gets enabled only if you have the access rights
<b>Result</b>	
The Environment Index page (add mode) is displayed	
2	Enter the Environment name and its description
3	Click Process
<b>Result</b>	
The environment is defined in the AVM database	

### Environment Index page (add mode)

### Field Descriptions

Environment	(text, 33 positions, alphanumeric, required) Enter the name of the associated environment. <b>NOTE:</b> The field cannot be edited in maintenance mode.
Description	(text, 60 positions, alphanumeric, required) Enter the description of the associated environment.
Last Changed By	(field) Displays the ID of the user who updated the application last time. The system automatically sets the value of this field as the ID of the user editing or adding the application. The field is empty in add mode and cannot be edited in maintain mode.

## Last Changed Date

(field)

Displays the date when the application was updated last time. The system automatically sets the value of this field as the date when the application is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Add a new environment to the database
Cancel	Cancel the additions and navigates to the Environment Index page

## Maintaining Environment Information

### Overview

The environment maintenance allows you to edit the environment name and its description. You can also delete an existing environment from this page. However, if you do not have the rights to update/delete environment information, all the fields and buttons in Environment Index page (maintain mode) are disabled. Only the Cancel button is enabled to close this page and navigate to the Environment Index page.

Step	Action
1	On the Environment Index page, click Maintain
<b>Result</b>	
The Environment Index page (maintain mode) is displayed	
2	<ul style="list-style-type: none"> <li>• Modify the details and click Process</li> <li>• To delete an environment, click Delete</li> </ul>
<b>Result</b>	
The changes are updated in the AVM database	

### Environment Index page (maintain mode)

The screenshot shows the 'Environment Index' page in 'maintain mode'. The page has a navigation bar with tabs: 'Allowable Values', 'Application/Environment', 'Application', 'Environment', 'Page', and 'Project'. The 'Environment' tab is selected. Below the navigation bar, there is a section titled 'Environment Information' with the following fields and buttons:

- Environment:** A text field containing 'DEVELOPMENT'.
- Description:** A text field containing 'Development Environment'.
- Last Changed By:** A text field containing 'DROMANO'.
- Last Changed Date:** A text field containing '07/11/2016'.
- Buttons:** 'Process', 'Cancel', and 'Delete'.

### Field Descriptions

**Environment** (text, 33 positions, alphanumeric, required)  
Displays the environment of the application. You can modify the environment, as required.

---

Description	(text, 60 positions, alphanumeric, required) Displays the description of the associated environment. You can modify the description, as required.
Last Changed By	(field) Displays the ID of the user who updated the application last time. The system automatically sets the value of this field as the ID of the user editing or adding the application. The field is empty in add mode and cannot be edited in maintain mode.
Last Changed Date	(field) Displays the date when the application was updated last time. The system automatically sets the value of this field as the date when the application is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Updates the changes to the database
Cancel	Cancels the changes and navigates to the Environment Index page
Delete	Deletes the environment from the database

## Application Environment Association

### Overview

Once an environment is created, it must be associated with an application. AVM allows you to create an association between application and an environment through the Application Environment Index page.

You can also use the Application Environment Association to view pages associated with an application and environment. Select a page and click View Fields button to view the fields of the page. To edit the field and its allowable values, select a field and click the desired button.

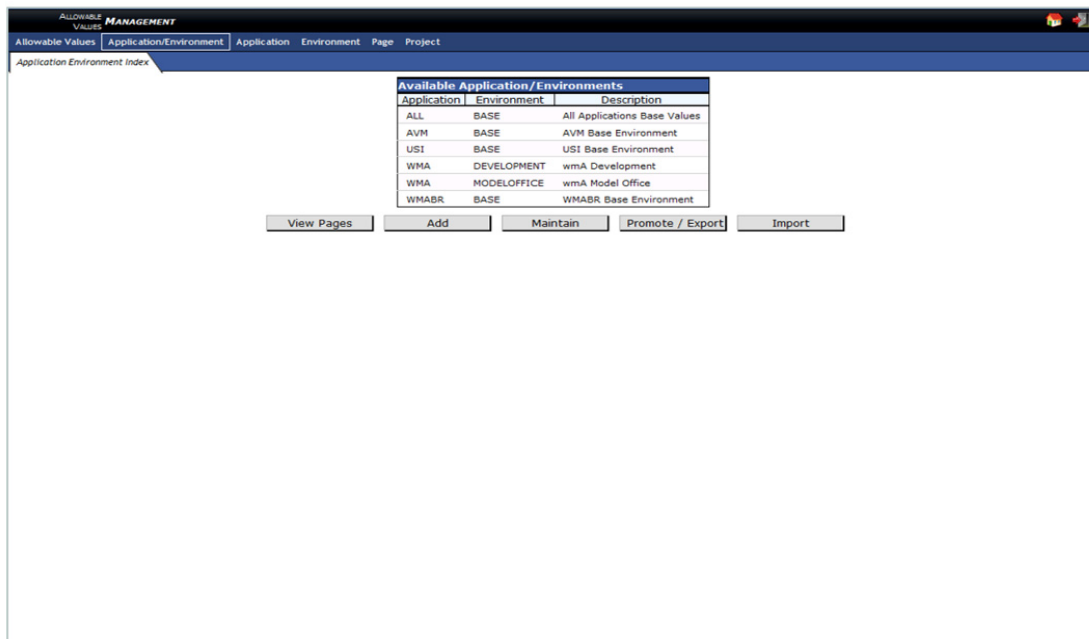
This section describes how to:

- view available application environment association details
- view pages associated with each application environment association
- promote the allowable values from one association to another association
- create a new application environment association
- maintain an existing application environment association
- import application environment data from an XML file
- export application environment information

### Navigation

On the menu bar click Application/Environment to access Application Environment Index page.

### Application Environment Index page



## Field Descriptions

Available Application/  
Environments

(list)

Lists all the application/environments defined within AVM.

The list displays the following information:

- Application
- Environment
- Description

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
View Pages	<p>Navigates to the Application Environment Index page (view mode)</p> <p>Enables you to view the information for a specific environment and application association</p> <p><b>Note:</b> This button gets enabled when you select an application environment association from the displayed list</p>
Add	<p>Navigates to the Application Environment Index page (add mode)</p> <p>Adds description of the application and environment association</p> <p><b>Note:</b> This button gets enabled only when you have the access rights to add information</p>
Maintain	Navigates to the Application Environment Index page (maintain mode)
Promote/Export	Navigates to the Promote/Export Information page
Import	Navigates to the Application Environment Index page (import mode)

## Viewing Application Environment Association

### Overview

You can view, add or delete pages associated with an environment. The pages associated with the environment are listed with their page IDs and description. You can also view or maintain fields and their corresponding allowable values for a page.

Step	Action
1	On the Application Environment Index page, select an application environment association and click <i>View Pages</i>
Result	
All pages attached with the environment are displayed in a list.	

### Application Environment Index page (view mode)

ALLOWABLE VALUES MANAGEMENT APPLICATION: WMA ENVIRONMENT: DEVELOPMENT

Allowable Values Application/Environment Application Environment Page Project

Application Environment Index

Page Filter Criteria

Search Text: Search By: Description View Results

Description	Page Id	Environment
Accounting Voucher	ACCOUNTINGVOUCHER	BASE
Accumulation - Accumulators	ANNCONTRACTPROFILEACCUMULATORS	BASE
Accumulation - Admin Fee Inquire Change	ANNADMINISTRATIVEFEEUPDATE	BASE
Accumulation - Administration	ANNCONTRACTPROFILEADMIN	BASE
Accumulation - Allocation Inquire Change	ANNALLOCATIONINQUIRYCHANGE	BASE
Accumulation - Alternate Asset Rebalancing Add	ANNALTERNATEREBALANCEADD	BASE
Accumulation - Alternate DCA Add	ANNALTERNATEDCAADD	BASE
Accumulation - Alternate Payment	ANNALTERNATEPAYMENT	BASE
Accumulation - Annuitization Index	ANNANNUITIZATIONINQUIRYINDEX	BASE
Accumulation - Annuitization Selection	ANNANNUITIZATIONSELECT	BASE
Accumulation - Asset Rebalancing Add	ANNREBALANCEADD	BASE
Accumulation - Asset Rebalancing Inquire Change	ANNREBALANCEUPDATE	BASE
Accumulation - Billing Inquire Change	ANNBILLINGUPDATE	BASE
Accumulation - Cancellation	ANNANCELLATION	BASE

View Fields Attach Page Back Detach Page

### Field Descriptions

#### Page Filter Criteria

- Search Text** (text, 30 positions, alphanumeric, optional)  
Enter the text you want to search in page ID or page description.
- Search By** (drop-down list)  
Select the respective option to search by the page ID or page description field.
- Attached Pages** (list)  
Lists all the pages associated with an Application/Environment combination. The list displays the following information:
- Page Id
  - Description



## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
View Results	Displays the list of application/environment association matching the filter criteria you select
View Fields	Displays the Attached Fields list
Attach Page	Displays a list of available pages, currently not attached to any application
Back	Navigates back to the Application Environment Index page
Detach Page	To detach pages, select the page you want to detach and click Detach Pages

## View Fields

The Page Field Index page displays a list of fields attached to a page.

Step	Action
1	On the Application Environment Index page, select a page from Attached Pages list and click View Fields
<b>Result</b>	
The Attached Fields list is displayed.	
2	To add a new field, click <i>Add</i> . To maintain or delete a field, select a field, and then click <i>Maintain</i> or <i>Delete</i>
<b>Result</b>	
The Application Environment Index page with a list of available fields is displayed	

For more information on adding, maintaining or deleting a field, refer to [Adding Fields](#) and [Maintaining Fields](#).

## Attach Pages

The Attach Page To Application/Environment page displays a list of available pages, currently not attached to any application.

Step	Action
1	On the Application Environment Index page, click Attach Pages
<b>Result</b>	
The Attach Page to Application Environment is displayed	
2	To search for a page, enter the search criteria in Page Filter Criteria section and click <i>View Results</i> . The pages matching the criteria are listed in Available Pages section
3	Select the desired page from the Available Pages list and click <i>Attach</i>
<b>Result</b>	
The selected page is attached to the application	

**NOTE:** For more information on adding, maintaining or deleting a field, refer to [Adding Fields](#) and [Maintaining Fields](#).

## Adding Application Environment Association

### Overview

The add process allows you to create a new application environment association.

Step	Action
1	On the Application Environment Index page, click Add
<b>Result</b>	
The Application Environment Index page (add mode) is displayed	
2	Select the application and the environment to be associated. Add a description for the association and click Process
<b>Result</b>	
The new association is added in the AVM database	

### Application Environment Index page (add mode)

The screenshot shows the 'Application Environment Index' page in 'add mode'. The page has a navigation bar with tabs for 'Allowable Values', 'Application/Environment', 'Application', 'Environment', 'Page', and 'Project'. The 'Application/Environment' tab is selected. The main content area contains a form titled 'Application/Environment Information'. The form has the following fields:

- Application:** A drop-down list.
- Environment:** A drop-down list.
- Description:** A text field.
- Last Changed By:** A text field.
- Last Changed Date:** A text field.

Below these fields are two side-by-side sections:

- Last Promotion From Information:**
  - From Environment:
  - Promotion Date:
  - Promotion Operator:
  - Option Used:
  - Change Date Used:
  - Project Used:
  - Import File:
- Promoted To Information:**
  - To Environment:
  - Promoted On Date:
  - Promoted By Operator:
  - Option Used:
  - Change Date Used:
  - Project Used:
  - Export File:

At the bottom of the form are three buttons: **Process**, **Cancel**, and **Delete**.

### Field Descriptions

#### Application/Environment Information

Application	(drop-down list) Select the application from the drop-down list. The system populates the list with the existing applications on the AVM database.
Environment	(drop-down list) Select the environment from the list of available environments.
Description	(text, 60 positions, alphanumeric, required) Enter the description of the associated Application/Environment association.

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Last Changed By	(field) Displays the ID of the user who updated the application/environment association last time. The system automatically sets the value of this field as the ID of the user editing or adding the application/environment association. The field is empty in add mode and cannot be edited in maintain mode.
Last Changed Date	(field) Displays the date when the application/environment association was updated last time. The system automatically sets the value of this field as the date when the application/environment association is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

### **Last Promotion Information**

From Environment	(field) The environment from which the data was promoted to this environment.
Promotion Date	(field) The date when the last promotion occurred.
Promotion Operator	(field) The operator ID of the person who processed the last promotion.
Option Used	(field) The promotion option used for on the last promotion.
Change Date Used	(field) The date from which the promotion information was brought into the environment.
Project Used	(field) The project associated to the data promoted.
Import File	(field) The name of the file imported if the last promotion was performed by importing a file.

### **Promoted To Information**

To Environment	(field) The environment that received the promoted data from this environment.
Promoted On Date	(field) The date when the last promotion occurred from this environment.
Promoted By Operator	(field) The operator ID of the person who processed the last promotion from this environment.

---

Option Used	(field) The promotion option used on the last promotion from this environment.
Change Date Used	(field) The date from which the promotion information was sent to the target environment.
Project Used	(field) The project associated with the data promoted.
Export File	(field) The name of the export file if the last promotion from this environment was performed by exporting a file.

---

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Associates the application with the environment
Cancel	Navigates you to the Application Environment Index page

## Maintaining Application Environment Association

### Overview

The application environment maintenance allows you to edit only the association's description. You cannot change the application or environment. However, if you do not have the rights to update application/environment information, all the fields and buttons in Application/ Environment Index page (maintain mode) are disabled. Only the Cancel button is enabled to close this page and navigate to the Application Environment Index page.

If you have security rights, you can also delete an application/environment association. However, application/environment association is not deleted if relational data is defined within the active Application and Environment.

Step	Action
1	On the Application/Environment Index page, select the application environment association you want to update
2	Click Maintain
<b>Result</b>	
The Application Information page (maintain mode) is displayed	
3	<ul style="list-style-type: none"> <li>• Modify the description and click <i>Process</i></li> <li>• To delete the application/environment association, click <i>Delete</i></li> </ul>
<b>Result</b>	
The application/environment association is updated	

## Application/Environment Index page (maintain mode)

**ALLOWABLE VALUES MANAGEMENT**

APPLICATION: **WMA** ENVIRONMENT: **DEVELOPMENT**

Allowable Values | Application/Environment | Application | Environment | Page | Project

Application Environment Index

**Application/Environment Information**

Application: **WMA** Environment: **DEVELOPMENT**  
 Description: **WMA Development**  
 Last Changed By: **TECHWRIT** Last Changed Date: **07/18/2016**

Last Promotion From Information	Promoted To Information
From Environment: <b>MODEL OFFICE</b>	To Environment:
Promotion Date: <b>07/18/2016</b>	Promoted On Date: <b>07/18/2016</b>
Promotion Operator: <b>TECHWRIT</b>	Promoted By Operator: <b>TECHWRIT</b>
Option Used: <b>Full Promotion</b>	Option Used: <b>Full Promotion</b>
Change Date Used:	Change Date Used:
Project Used:	Project Used:
Import File: <b>USIUpdates.xml</b>	Export File: <b>AVMReferences.xml</b>

Process Cancel Delete

## Field Descriptions

Application	(field) Displays the name of the application.
Environment	(field) Displays the environment of the application.
Description	(text, 60 positions, alphanumeric, required) Displays the description of the associated Application/Environment association. You can modify the description, as required.
Last Changed By	(field) Displays the ID of the user who updated the application/environment association last time. The system automatically sets the value of this field as the ID of the user editing or adding the application/environment association. The field is empty in add mode and cannot be edited in maintain mode.
Last Changed Date	(field) Displays the date when the application/environment association was updated last time. The system automatically sets the value of this field as the date when the application/environment association is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

## Last Promotion Information

From Environment	(field) The environment from which the data was promoted to this environment.
------------------	--

---

Promotion Date	(field) The date when the last promotion occurred.
Promotion Operator	(field) The operator ID of the person who processed the last promotion.
Option Used	(field) The promotion option used for on the last promotion.
Change Date Used	(field) The date from which the promotion information was brought into the environment.
Project Used	(field) The project associated to the data promoted.
Import File	(field) The name of the file imported if the last promotion was performed by importing a file.

#### **Promoted To Information**

To Environment	(field) The environment that received the promoted data from this environment.
Promoted On Date	(field) The date when the last the promotion occurred from this environment.
Promoted By Operator	(field) The operator ID of the person who processed the last promotion from this environment.
Option Used	(field) The promotion option used on the last promotion from this environment.
Change Date Used	(field) The date from which the promotion information was sent to the target environment.
Project Used	(field) The project associated with the data promoted.
Export File	(field) The name of the export file if the last promotion from this environment was performed by exporting a file.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Update the association of the application with the environment
Cancel	Cancel the changes and navigates you to the Application Environment Index page
Delete	Delete the application/environment association



## Promoting or Exporting Application Environment Data

### Overview

An environment's data can be promoted to another environment within the same application. A base environment can be exported but cannot be promoted.

### Promoting

The Promotion/Export page lists all the environments for the selected application. You can select the environment to which you want the data to be promoted. You can also view the last promotion details for each environment.

Step	Action
1	From the Application/Environment Index page, select the desired application environment association
2	Click Promote/Export
<b>Result</b>	
The Promotion/Export Information page is displayed	
3	Select a promotion option and enter a description
4	Click Review Promotion. The Promotion/Export Options Chosen Page opens to display all allowable value field information for the requested promotion.  Once you review the promotion information you can either choose to continue with the promotion or cancel the process entirely
<b>Result</b>	
The selected application environment is promoted.	

### Exporting

You can export an environment's data to another environment within the same application. The exported data is stored in an XML file. This file can be imported back into any environment, other than base.

Step	Action
1	From the Application/Environment Index page, select the desired application/environment association
2	Click Promote/Export
<b>Result</b>	
The Promotion/Export Information page displays	
3	Select an environment
4	Select a promotion option and enter a description
5	Click <i>Review Export</i> . The Promotion/Export Options Chosen Page opens to display all allowable value field information for the requested export  Once you review the promotion information you can either choose to continue with the export or cancel the process entirely
<b>Result</b>	
The selected application environment is exported and Application Environment Promotion/Export Request Review Page displays	

## Promotion/Export Information page

The screenshot shows the 'Promotion/Export Information' page. At the top, there's a navigation bar with 'Allowable Values' and 'MANAGEMENT'. Below it, a sub-header shows 'APPLICATION: WHA' and 'ENVIRONMENT: MODELOFFICE'. The main form area has a title 'Promotion/Export Information'. It contains a dropdown for 'Option' (set to 'All Changes After Date'), a text field for 'Description', and a date picker for 'Change Date'. Below this is a table titled 'Available Promote to Environments' with columns: Environment, Last Promotion Date, From Environment, Option Used, Change Date Used, and Project Used. The table lists 'BASE' and 'DEVELOPMENT' environments. At the bottom, there are three buttons: 'Review Promotion', 'Review Export', and 'Cancel'.

## Field Descriptions

### Promotion/Export Information

- Option** (drop-down list)  
Select the method of exporting data from AVM. The available options are:
- All Changes After Date - Promotes changes that have occurred in the source environment after the Change Date. This option requires entry of a Change Date
  - Changes From Last Promotion - Promotes changes that have occurred in the source environment since the target environment's Last Promotion Date
  - All Changes For Project - Promotes changes associated with a Project. This option requires entry of a Project
  - Full Promotion - Deletes all of the field information in the target environment and promotes all field information from the source environment
- Description** (text, 45 positions, alphanumeric, required)  
Indicates the description for the promotion/export process.
- Change Date** (text, 8 positions, conditionally required, MMDDYYYY)  
Indicates the date after which all changes in the source environment are promoted. Click the calendar icon to select the date.  
The field is used in conjunction with the All Changes After Date Promotion Option.

Project	<p>(drop-down list)</p> <p>Select the project whose associated changes are promoted. The list box is populated with a list of all projects added to the source environment. The field is used in conjunction with the All Changes for Project Promotion Option. Available Promote to Environments.</p>
Available Promote to Environments	<p>(list)</p> <p>Displays a list of all environment associated with the application. The list displays the following information:</p> <ul style="list-style-type: none"> <li>• Environment</li> <li>• Last Promotion Date</li> <li>• From Environment</li> <li>• Option Used</li> <li>• Change Date Used</li> <li>• Project Used</li> </ul>

## Functions

The functions associated with the buttons in this page are described in the following table:

Button	Description
Review Promotion	Navigates to the Promotion/Export Options Chosen page
Review Export	Navigates to the Promotion/Export Options Chosen page
Cancel	Cancels the initiation of Promote/Export process and navigates to the Application/Environment Index page

## Promotion/Export Options Chosen page

The screenshot shows the 'Promotion/Export Options Chosen' dialog box within the 'Allowable Values Management' application. The application title bar indicates 'APPLICATION: WMA' and 'ENVIRONMENT: DEVELOPMENT'. The dialog box has a title bar 'Promotion/Export Options Chosen' and contains the following fields:

- To Environment: **MODELOFFICE**
- Description: **Base**
- Option: **Full Promotion**
- Change Date:
- Change Project:

Below these fields is a section titled 'Requested Promotion Results' which contains a table with the following columns: Field Name, Page, Company, Product, Trx Code, Project, Status, Last Changed By, Last Change Date. The table currently displays 'No Records Found'.

At the bottom of the dialog box, there is an 'Export File Name:' label and two buttons: 'Promote' and 'Cancel'.

## Field Descriptions

### Promotion/Export Options Chosen

To Environment	(field) Displays the destination environment for the promote/export process.
Description	(field) Displays the description for the promotion/export process.
Option	(field) Displays the method of exporting data from AVM.
Change Date	(field) Displays the date after which all changes in the source environment are promoted.
Change Project	(field) Displays the project whose changes are promoted.
Requested Promotion Results	(list) Displays the data promoted with the request. The list displays the following information: <ul style="list-style-type: none"> <li>Field Name</li> <li>Page</li> <li>Company</li> <li>Product</li> <li>Trx Code</li> </ul>

- Project
- Status
- Last Changed By
- Last Changed Date

Export File Name (text, 25 positions, alphanumeric, required)  
Enter a file name for the exported data.

## Functions

The functions associated with the buttons in this page are described in the following table:

Button	Description
Export	An export file is created in the directory configured in the application
Cancel	Cancels the initiation of Promote/Export process and navigates to the Application/Environment Index page

## Importing Application Environment Data

### Overview

You can import an environment's data to the current environment within the same application. On the Application/Environment Index page (import mode), the Import File drop-down list displays all the available files that are available to be imported. The available files displayed in the Import File drop-down list are retrieved from the directory configured in the application context through the Import/Export Location attribute.

Step	Action
1	From the Application/Environment Index page, select the desired application environment association
2	Click Import
<b>Result</b>	
The Application/Environment Index page (import mode) is displayed	
3	From the import file drop-down list, select the desired xml file
4	Click Review Import. The Application/Environment Index (Requested Import Results) page displays all field information about the import process that you have requested. Once you review the import information you can either import or cancel the import process
<b>Result</b>	
The data from the selected xml file is imported in the current environment	

## Application Environment Index page (import mode)

### Field Description

#### Import Information

Import File (drop-down list)  
Select the XML file to import from the AVM directory.

#### Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Review Import	Navigates to the Application/Environment Index (Requested Import Results) page  Enables you to review the import information
Cancel	Enables you to cancel the review result, if required

## Application Environment Index (Requested Import Results) page

**ALLOWABLE VALUES MANAGEMENT** APPLICATION: WHA ENVIRONMENT: DEVELOPMENT

Allowable Values Application/Environment Application Environment Page Project

Application Environment Index

**Original Export Options Chosen**

Import File Name: **AVMReferences.xml** From Environment Id: **DEVELOPMENT**  
 Export Option: **Full Promotion** Description: **Base**  
 Export Change Date: Export Change Project:

**Requested Import Results**

Field Name	Page	Company	Product	Trx Code	Project	Status	Last Changed By	Last Change Date
No Records Found								

Import Cancel

## Field Descriptions

### Original Export Options Chosen

Import File Name	(field)	Indicates the name of the imported XML file from AVM directory.
From Environment Id	(field)	Indicates the source environment for the import process.
Export Option	(field)	Indicates the method of exporting data from AVM.
Description	(field)	Displays the description for the promotion/export process.
Change Date	(field)	Displays the date after which all changes in the source environment are promoted.
Export Change Project	(field)	Indicates the project whose changes are promoted.
Requested Import Results	(list)	Displays the data imported with the request. The list displays the following information: <ul style="list-style-type: none"> <li>Field Name</li> </ul>



- Page
- Company
- Product
- Trx Code
- Project
- Status
- Last Changed By
- Last Changed Date

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Import	Performs the process of creating/updating the fields and page information from the import file into the active environment
Cancel	Enables you to terminate the import process

## Maintaining Allowable Values

### Overview

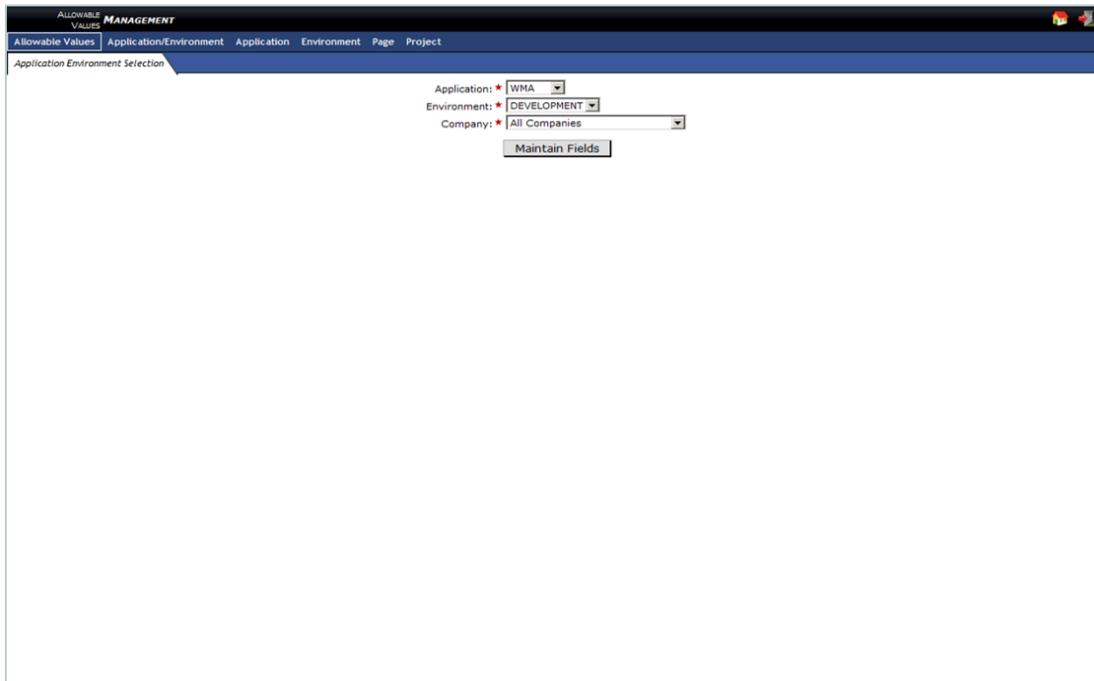
Allowable values can be maintained or added for a company specific application and environment. This section describes how to:

- search by using filter criteria
- add fields
- clone fields
- maintain fields
- view pages associated with fields
- attach fields to page

### Navigation

On the menu bar click Allowable Values to access the Application Environment Selection page.

### *Application Environment Selection page*



The screenshot shows the 'Application Environment Selection' page within the 'ALLOWABLE VALUES MANAGEMENT' application. The page has a menu bar with 'Allowable Values', 'Application/Environment', 'Application', 'Environment', 'Page', and 'Project'. Below the menu bar, there is a section titled 'Application Environment Selection'. This section contains three dropdown menus: 'Application' (set to 'WMA'), 'Environment' (set to 'DEVELOPMENT'), and 'Company' (set to 'All Companies'). Below these dropdowns is a button labeled 'Maintain Fields'.

### Field Descriptions

Application

(drop-down list)

Select the application from the drop-down list. The system populates the list with the existing applications on the AVM database.

Environment

(drop-down list)

Select the environment from the list of available environments.

---

**Company** (drop-down list)  
Select the company from the available companies for the application.

---

**Function** The function associated with the button on this page is described in the following table:

Button	Description
Maintain Fields	Navigates you to the Application Environment Selection page (Filter Criteria)

## Filtering Fields

### Overview

This page displays the fields defined for specific Application and Environment. You can view all the available fields or filter the fields based on company, product, and transaction code. You can also search for fields based on their name or description.

### Application Environment Selection page (Filter Criteria)

ALLOWABLE VALUES MANAGEMENT APPLICATION: WMA ENVIRONMENT: DEVELOPMENT

Allowable Values Application/Environment Application Environment Page Project

Application Environment Selection

**Field Filter Criteria**

Company: \* All Companies  
Product: \* All Products  
Trx Code: \* All Transactions  
Search Text:   
Search By: Field Name

View Results

Field Name	Application	Environment	Company	Product	Trx Code	Page	Status
_1035_Distribution_Code	WMA	BASE	ALL	ALL	ALL	ALL	A
_1035_Indicator	WMA	BASE	ALL	ALL	ALL	ALL	A
_1035_Indicator_Annuity	WMA	BASE	ALL	ALL	ALL	ALL	A
_1035_Indicator_TRD_TA	WMA	BASE	ALL	ALL	ALL	ALL	A
1042S_Country_code	WMA	BASE	ALL	ALL	ALL	ALL	A
1042S_Exempt_code	WMA	BASE	ALL	ALL	ALL	ALL	A
1042S_Income_Code	WMA	BASE	ALL	ALL	ALL	ALL	A
1042S_Recipient_Code	WMA	BASE	ALL	ALL	ALL	ALL	A
account_info_page_anticipated_1035_unsched_ALIR_premium_class	WMA	BASE	ALL	ALL	ALL	ALL	A
account_info_page_anticipated_1035_unsched_ALIR_table_rating	WMA	BASE	ALL	ALL	ALL	ALL	A
account_info_page_anticipated_sched_ALIR_premium_class	WMA	BASE	ALL	ALL	ALL	ALL	A

<< < 1 2 3 4 5 6 7 8 9 10 > >>

Clone Add Maintain Back

### Field Descriptions

Company

(drop-down list)

Select a company from the list of available companies.

Product

(drop-down list)

Select a product from the list of available products.

Trx Code

(drop-down list)

Select a transaction code from the list of available transactions.

Search Text

(text, 45 positions, alphanumeric, required)

Enter the field text you want to search.

Search By

(drop-down list)

Allows you to specify if the search text is based on field name or field description.

## Available Fields

(list)

Displays the list of fields matching the filter criteria. For instance, the *Page* field displays the association of the corresponding Field Name to either specific business rule or ALL business rules.

The list displays information for the following fields:

- Field Name
- Application
- Environment
- Company
- Product
- Trx Code
- Page
- Status

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
View Results	Displays the available fields matching the filter criteria you select.  The Next and Previous buttons are enabled to navigate through the results if there are more than 11 records.
Clone	Navigates you to the Application Environment Selection page (clone mode)  <b>Note:</b> This button gets enabled only if you have access rights to clone the field.
Add	Navigates you to the Application Environment Selection page (add mode)  <b>Note:</b> This button gets enabled only if you have access rights to add the field.
Maintain	Navigates you to the Application Environment Selection page (maintain mode)
Back	Navigates you to the Application Environment Selection page

## Adding Fields

### Overview

The add process allows you to add a new field with its allowable value(s) for an application. The process for the list and range allowable values is same.

When you add a field for the first time, you need to select All Companies, Products, Transactions, and Pages options from the drop-down lists. This is the default entry for the field that ensures at least one search result is displayed. All the keys - company, product, transaction code, and page have equal weightage. Select a different product, company, transaction code, or page only if you want to add a field with the same name but different allowable values.

**NOTE:** Once you select an option other than the default values, you cannot revert to the default options. The system displays an error and you cannot proceed further.

Step	Action
1	On the Application Environment Selection page (Filter Criteria), click Add
<b>Result</b>	
The Application Environment Selection page (add mode) is displayed	
2	Enter information of the new field in the fields. The required fields are marked with a red *
3	In the Allowable Values/Allowable Ranges list, select the number of allowable values to be entered for the field and click Add
<b>Result</b>	
The selected number of records are added to the Allowable Values/Allowable Ranges list	
4	Enter the allowable values for the new field. After adding all the allowable values, click Process
<b>Result</b>	
The new field with allowable values is added to the application	

## Application Environment Selection - Allowable Values page (add mode)

## Field Descriptions

Application	(field) Displays the name of the application.
Environment	(field) Displays the environment of the application.
Project	(field) Displays the name of the project for the field which has been modified last.
Company	(drop-down list, optional) Select the company from the available companies for the application.
Product	(drop-down list, optional) Select the product associated with the field.
Trx Code	(drop-down list, optional) Select the transaction code associated with the field.
Type	(radio button) Select the type of allowable values you want to enter - List or Range.
Page	(drop-down list) Select the name of the page for which you want to enter allowable values of the fields.

Field Status (drop-down list)  
Select the status of the field.

Valid values:

Active

Deleted

Field Name (text, 80 positions, alphanumeric, required)  
Enter the name of the field.

Description (text, 60 positions, alphanumeric, required)  
Enter the description for the field.

### Allowable Values

Status (drop-down list)  
Select the status of the allowable value for the field.

Valid values:

Active

Deleted

Core Value (text, 15 positions, alphanumeric, required)  
Enter the core value of the allowable value.

Default (check box)  
Select the check box to make this allowable value as the default value.

Display Value (text, 128 positions, alphanumeric, required)  
Enter the value that is displayed for the allowable value in the field.

Project (field)  
Displays the name of the project for the allowable values in the maintain mode page.



## Application Environment Selection - Allowable Ranges page (add mode)

### Allowable Ranges

**Range Default Value** (text, 11 positions, 10 decimal places, numeric, optional)  
Enter the default value for the allowable range.

**Status** (drop-down list)  
Select the status of the allowable value for the field.

Valid values:

Active

Deleted

**Minimum Value** (text, 11 positions, 10 decimal places, numeric, required)  
Enter the minimum value for the allowable range.

**Maximum Value** (text, 11 positions, 10 decimal places, numeric, required)  
Enter the maximum value for the allowable range.

**Project** (field)  
Displays the name of the project for the allowable values in the maintain mode page.

**Save under Project** (drop-down list)  
Select the project under which all the changes made to the field and its allowable values are saved.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Add	Adds selected number of rows in the Allowable Values/Allowable Ranges list for entering allowable values of the field
Process	Adds the new field to the application
Cancel	Navigates you to the Application Environment Selection page (Filter Criteria)
View Pages	Navigates to the Application Environment Selection page (View Pages) which displays the selected field information and the pages with which the field is associated. You may associate the field to more pages. Refer to the <a href="#">Viewing Pages</a> section for information on viewing and attaching pages

## Cloning Fields

### Overview

The Clone process lets you clone a set of allowable values of a field from one company or product to another. The cloning of allowable values can be done with the same or a new project.

Step	Action
1	In the Application Environment Selection page (Filter Criteria), select the field to be cloned
2	Click Clone
<b>Result</b>	
The Application Environment Selection page (clone mode) is displayed	
3	Enter the Field Name and its Description
4	Edit other fields and the allowable values, if required
5	Click Process
<b>Result</b>	
The cloned field with its allowable values is added to the database and reflected in the application	

### Application Environment Selection page (clone mode)

The screenshot shows the 'Allowable Values Management' application interface. The top navigation bar includes 'Allowable Values', 'Application/Environment', 'Application', 'Environment', 'Page', and 'Project'. The main content area is titled 'Application Environment Selection'. It features several filters: 'Application: WMA', 'Company: All Companies', 'Environment: DEVELOPMENT', 'Product: All Products', 'Trx Code: All Transactions', 'Type: List', 'Page: All Pages', and 'Field Status: Active'. The 'Field Name' is set to '\_1035\_Distribution\_Code' and the 'Description' is '\_1035\_Distribution\_Code'. Below these filters is a table titled 'Allowable Values' with columns: Status, Core Value, Default, Display Value, and Project. The table contains five rows of data, each with a status dropdown set to 'Active'. The 'Core Value' column contains 'D', 'P', 'R', and 'X'. The 'Default' column has checkboxes, with the first one checked. The 'Display Value' column contains 'D - Disability', 'P - Premature', 'R - Rollover', and 'X - Qualified LTC'. The 'Project' column contains the value '1001'. At the bottom of the table is a 'Save Under Project' dropdown set to '1001'. Below the table are three buttons: 'Process', 'Cancel', and 'View Pages'.

### Field Descriptions

Refer to the [Field Descriptions](#) of the Adding Fields section for more information.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Add	Adds selected number of rows in the Allowable Values/Allowable Ranges list for entering allowable values of the field
Process	Adds the cloned field to the database
Cancel	Navigates you to the Application Environment Selection page (Filter Criteria)
View Pages	Navigates to the Application Environment Selection page (View Pages) which displays the selected field information and the pages with which the field is associated. You may associate the field to more pages. Refer to the <a href="#">Viewing Pages</a> section for information on viewing and attaching pages

## Maintaining Fields

### Overview

The Maintain process allows you to update current allowable values of a field and also change descriptions and status of the field as desired. The deleted fields or allowable values are not displayed in the calling application once the status is changed to Deleted. The changes may apply to:

- a specific company or all companies
- a specific product or all products
- a specific transaction or all transactions

Step	Action
1	In the Application Environment Selection page (Filter Criteria), select the field to be updated
2	Click Maintain
<b>Result</b>	
The Application Environment Selection page (maintain mode) is displayed	
3	Select the company, product, transaction code, and page to which the changes apply
4	Enter the required changes
5	Click Process
<b>Result</b>	
The field is updated in the database and reflected in the application	

### Application Environment Selection page (maintain mode)

Allowable Values Management

APPLICATION: WMA ENVIRONMENT: DEVELOPMENT

Allowable Values Application/Environment Application Environment Page Project

Application Environment Selection

Application: WMA Environment: BASE Project:

Company: All Companies Product: All Products Trx Code: All Transactions

Type: List Page: All Pages Field Status: Active

Field Name: \*\_1035\_Distribution\_Code Description: \*\_1035\_Distribution\_Code

Status	Core Value	Default	Display Value	Project
Active		<input checked="" type="checkbox"/>		
Active	D	<input type="checkbox"/>	D - Disability	
Active	P	<input type="checkbox"/>	P - Premature	
Active	R	<input type="checkbox"/>	R - Rollover	
Active	X	<input type="checkbox"/>	X - Qualified LTC	1001

Save Under Project: \*

Process Cancel View Pages

### Field Descriptions

Refer to the [Field Descriptions](#) of the Adding Fields section for more information.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Add	Adds selected number of rows in the Allowable Values/Allowable Ranges list for entering allowable values of the field
Process	Updates changes to the field
Cancel	Navigates you to the Application Environment Selection page (Filter Criteria)
View Pages	Navigates to the Application Environment Selection page (View Pages) which displays the selected field information and the pages with which the field is associated. You may associate the field to more pages. Refer to the <a href="#">Viewing Pages</a> section for information on viewing and attaching pages

## Viewing Pages

### Overview

While maintaining an allowable value, you can refer to the application pages associated with the field. The pages associated with the field are displayed in a list containing their page ID, description, and environment information.

Step	Action
1	Click <i>View Pages</i> on the add mode, clone mode, or maintain mode of the Application Environment Selection page
Results	
<ul style="list-style-type: none"><li>The Application Environment Selection page (View Pages) is displayed</li><li>The page displays the selected field information and the pages with which the field is associated</li></ul>	

### Application Environment Selection page (View Pages)

The screenshot shows the 'Application Environment Selection' page in the 'Allowable Values Management' application. The page is titled 'APPLICATION: WHA' and 'ENVIRONMENT: DEVELOPMENT'. It displays a table of pages associated with the field '\_1035\_Distribution\_Code'. The table has columns for Description, Page Id, and Environment. The rows are: Traditional Life - Full Surrender (TRDFULLSURRENDER, BASE), Universal Life - Scheduled Disbursement Add (ULSCHEDULEDDISBURSEMENTADD, BASE), and Universal Life - Scheduled Disbursement Inquiry/Change (ULSCHEDULEDDISBURSEMENTINQCHANGE, BASE). Below the table are buttons for 'Attach To Page' and 'Back'.

Pages Field is Attached To		
Description	Page Id	Environment
Traditional Life - Full Surrender	TRDFULLSURRENDER	BASE
Universal Life - Scheduled Disbursement Add	ULSCHEDULEDDISBURSEMENTADD	BASE
Universal Life - Scheduled Disbursement Inquiry/Change	ULSCHEDULEDDISBURSEMENTINQCHANGE	BASE

Buttons:

### Field Descriptions

Application	(field) Displays the name of the application.
Environment	(field) Displays the environment of the application.
Project	(field) Displays the name of the project for the allowable values in the maintain mode page.

---

Company	(field) Displays the name of the company.				
Product	(field) Displays the name of the product.				
Trx Code	(field) Displays the transaction code.				
Type	(field) Displays the type of allowable value.  Valid values:  <table> <tr> <td>L</td><td>List</td></tr> <tr> <td>R</td><td>Range</td></tr> </table>	L	List	R	Range
L	List				
R	Range				
Page	(field) Displays the name of the page.				
Field Status	(field) Displays the status of the field.  Valid values:  <table> <tr> <td>A</td><td>Active</td></tr> <tr> <td>D</td><td>Deleted</td></tr> </table>	A	Active	D	Deleted
A	Active				
D	Deleted				
Field Name	(field) Displays the name of the field.				
Description	(field) Displays the description of the field.				
Pages Field is Attached To	(list) Displays the list of pages with which the field is associated. The list displays information for the following fields: <ul style="list-style-type: none"> <li>• Description</li> <li>• Page Id</li> <li>• Environment</li> </ul>				



## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Attach To Page	Navigates to the Application Environment Selection page (Attach to Page)
Back	Navigates you to the add mode, clone mode, or maintain mode of the Application Environment Selection page

## Attaching Field to Page

The Attach Field to Page allows you to associate a field to any page defined within an application/environment. When a field is added or modified, you need to attach the field to a page. This ensures that the field is displayed in the Attached Fields list in Application/Environment Association.

Step	Action
1	On the Application Environment Selection page (View Pages), click Attach To Page
<b>Result</b>	
The Application Environment Selection page (Attach to Page) is displayed	
2	Select the required page and click Attach
<b>Result</b>	
The field is attached to the selected page	

## Application Environment Selection (Attach to Page) page

ALLOWABLE VALUES MANAGEMENT

APPLICATION: WMA ENVIRONMENT: DEVELOPMENT

Allowable Values Application/Environment Application Environment Page Project

Application Environment Selection

Field Name: \_1035\_Distribution\_Code Description: \_1035\_Distribution\_Code

Page Filter Criteria

Search Text: Search By: Description View Results

Description	Page Id
Accounting Voucher	ACCOUNTINGVOUCHER
Accumulation - Accumulators	ANNCONTRACTPROFILEACCUMULATORS
Accumulation - Admin Fee Inquire Change	ANNADMINISTRATIVEFEEUPDATE
Accumulation - Administration	ANNCONTRACTPROFILEADMIN
Accumulation - Allocation Inquire Change	ANNALLOCATIONINQUIRYCHANGE
Accumulation - Alternate Asset Rebalancing Add	ANNALTERNATEREBALANCEADD
Accumulation - Alternate DCA Add	ANNALTERNATEDCAADD
Accumulation - Alternate Payment	ANNALTERNATEPAYMENT
Accumulation - Annuitization Index	ANNANNUITIZATIONINQUIRYINDEX
Accumulation - Annuitization Selection	ANNANNUITIZATIONSELECT
Accumulation - Asset Rebalancing Add	ANNREBALANCEADD
Accumulation - Asset Rebalancing Inquire Change	ANNREBALANCEUPDATE
Accumulation - Billing Inquire Change	ANNBILLINGUPDATE

Attach Cancel

## Field Descriptions

Field Name	(field) Displays the name of the field.
Description	(field) Displays the description of the field.

## Page Filter Criteria

Search Text	(text, 35 positions, alphanumeric, required) Enter the text you want to search.
Search By	(drop-down list) Allows you to specify if the search text is based on Page Id or description.
Available Pages	(list) Displays a list of records matching the filter criteria. The list displays information for the following fields: <ul style="list-style-type: none"> <li>• Description</li> <li>• Page Id</li> </ul>

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
View Results	Displays the available pages matching the filter criteria you select  The Next and Previous buttons are enabled to navigate through the results if there are more than 13 records
Attach	Associates the selected page with the field
Cancel	Navigates you to the Application Environment Selection page (View Pages)

## Maintaining Application Pages

### Overview

A page is a logical collection of fields defined within an application/environment. The Page Index page is used to view, add, and maintain pages of specific applications within AVM.

The Page Index page displays all the existing pages of the applications within AVM by default. You can use the Page Filter Criteria to search for specific pages.

This section describes how to:

- search and view pages
- add a new page
- maintain existing pages

### Navigation

On the menu bar click Pages to access the Page Index page.

### Page Index page

**Page Index**

**Page Filter Criteria**

Application:  Search Text:  Search By:

Application	Page Id	Description	Last Changed By	Last Changed Date
ALL	ALL	All Pages	WV1601	08/20/2007
WMA	ACCOUNTINGVOUCHER	Accounting Voucher	WV1601	06/14/2016
WMA	ADVANCENOTIFY	Advance Notify	WV1601	06/14/2016
WMA	ANNADMINISTRATIVEFEEUPDATE	Accumulation - Admin Fee Inquire Change	WV1601	06/14/2016
WMA	ANNALLOCATIONINQUIRYCHANGE	Accumulation - Allocation Inquire Change	WV1601	06/14/2016
WMA	ANNALTERNATECAADD	Accumulation - Alternate DCA Add	WV1601	06/14/2016
WMA	ANNALTERNATEPAYEEADD	Payout - Payee Alternate Add	WV1601	06/14/2016
WMA	ANNALTERNATEPAYMENT	Accumulation - Alternate Payment	WV1601	06/14/2016
WMA	ANNALTERNATEREBALANCEADD	Accumulation - Alternate Asset Rebalancing Add	WV1601	06/14/2016
WMA	ANNALTERNATESYSTEMATICWITHDRAWALADD	Accumulation - Systematic Withdrawal Alternate Add	WV1601	06/14/2016
WMA	ANNANNUITIZATIONINQUIRYINDEX	Accumulation - Annuity Index	WV1601	06/14/2016
WMA	ANNANNUITIZATIONSELECT	Accumulation - Annuity Selection	WV1601	06/14/2016
WMA	ANNASSETACCOUNTENTRY	Asset Account Add	WV1601	06/14/2016
WMA	ANNASSETACCOUNTFULLSURRENDER	Asset Account Full Surrender	WV1601	06/14/2016

### Field Descriptions

Application

(drop-down list)

Select the application from the drop-down list. The system populates the list with the existing applications on the AVM database.

Search Text

(text, 30 positions, alphanumeric, optional)

Enter the text you want to search in Page ID or Page description.

**Search By** (drop-down list)  
Select the respective option to search by the Page ID or Page description field.

**Available Pages** (list)  
Displays a list of records matching the filter criteria.  
The list displays information for the following fields:

- Application
- Page ID
- Description
- Last Changed By
- Last Changed Date

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
View Results	Displays the available pages matching the filter criteria you select  The Next and Previous buttons are enabled to navigate through the results if there are more than 14 records
Add	Navigates you to the Page Information page (add mode)
Maintain	Navigates you to the Page Information page (maintain mode)

## Adding Pages to AVM

### Overview

The add process allows you to create a new page for an application.

Step	Action
1	In the Page Index page, click Add
<b>Result</b>	
The Page Information page (add mode) is displayed	
2	Enter information of the new page in the fields. The required fields are marked with a red *
3	Click <i>Process</i>
<b>Result</b>	
The new page is added to the application	

### Page Information page (add mode)

The screenshot shows the 'Page Information' form in 'add mode'. The form is titled 'Page Information' and has a sub-header 'Page Information'. It contains the following fields:

- Application:** A drop-down menu with 'ALL' selected.
- Page Id:** A text field with a red asterisk indicating it is required.
- Description:** A text field with a red asterisk indicating it is required.
- Last Changed By:** A text field.
- Last Changed Date:** A text field.

At the bottom of the form are three buttons: **Process**, **Cancel**, and **Delete**.

### Field Descriptions

Application	(drop-down list) Select the application from the drop-down list. The system populates the list with the existing applications on the AVM database.
Page Id	(text, 100 positions, alphanumeric, required) Enter the page ID.
Description	(text, 60 positions, alphanumeric, required) Enter the description of the associated page.

**Last Changed By** (field)  
Displays the ID of the user who updated the page last time. The system automatically sets the value of this field as the ID of the user editing or adding the page. The field is empty in add mode and cannot be edited in maintain mode.

**Last Changed Date** (field)  
Displays the date when the page was updated last time. The system automatically sets the value of this field as the date when the page is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Adds the page to the database
Cancel	Cancels the additions and navigates to the Page Index page

## Maintaining Pages

### Overview

The Page maintenance allows you to edit the page description only. You cannot change the page ID and the associated application. If you do not have access rights to update the page information, all the fields on the page are disabled.

You can also delete an existing page from the Page Information page. However, if the page is attached to an Application/Environment the delete function is not allowed.

Step	Action
1	On the Page Index page, select the page to be updated/deleted
2	Click <i>Maintain</i>
<b>Result</b>	
The Page Information page is displayed in maintain mode	
3	<ul style="list-style-type: none"> <li>Modify the page description and click <i>Process</i></li> <li>To delete a page, click <i>Delete</i></li> </ul>
<b>Result</b>	
The selected page is updated/deleted	

### Page Information page (maintain mode)

The screenshot shows the 'Page Information' form in 'maintain mode'. The form is titled 'Page Information' and contains the following fields and values:

- Application: **WMA**
- Page Id: **ACCOUNTINGVOUCHER**
- Description: **Accounting Voucher**
- Last Changed By: **WV1601**
- Last Changed Date: **06/14/2016**

At the bottom of the form, there are three buttons: **Process**, **Cancel**, and **Delete**.

### Field Descriptions

Application (field)  
Displays the name of the application.

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Page Id	(field) Displays the unique name of the page.
Description	(text, 60 positions, alphanumeric, required) Displays the description of the associated page. You can modify the description, as required.
Last Changed By	(field) Displays the ID of the user who updated the page last time. The system automatically sets the value of this field as the ID of the user editing or adding the page. The field is empty in add mode and cannot be edited in maintain mode.
Last Changed Date	(field) Displays the date when the page was updated last time. The system automatically sets the value of this field as the date when the page is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

---

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Update the changes to the database
Cancel	Cancel the changes and navigates to the Page Index page
Delete	Delete a page



## Maintaining Projects

### Overview

A Project in AVM is a collection of related changes to the AVM database. Projects are used to synchronize the AVM database across multiple environments by promotions. With Projects, you can perform updates for more than one implementation within another environment. You should not change the same field or value as part of multiple projects under development. All changes to the field or value are assigned to the last project to perform and update. You must set up at least one project before making any changes to the allowable values.

This section describes how to:

- search and view projects
- add a new project
- maintain existing projects

### Navigation

On the menu bar click *Project* to access the Project Index page.

### Project Index page

Project Index

**Project Filter Criteria**

Application: ALL  Display Disabled Projects: ☐

Search Text:  Search By: Project Id

Application	Project Id	Description	Status	Last Changed By	Last Changed Date
USI	1220	User Security Interface Updates	A	TECHWRIT	07/14/2016
WMA	WV-1601	wmA Release 16.01	A	TECHWRIT	07/18/2016

### Field Descriptions

#### Application

(drop-down list)

Select the application from the drop-down list. The system populates the list with the existing applications on the AVM database.

Display Disabled Projects	(check box) Select the check box to include disabled projects in your search. Clear this checkbox to search for active projects only.
Search Text	(text, 30 positions, alphanumeric, optional) Enter the text you want to search in Project ID or Project description.
Search By	(drop-down list) Select the respective option to search by the Project ID or Project description field.
Available Projects	(list) Displays a list of records matching the filter criteria. The list displays information for the following fields: <ul style="list-style-type: none"> <li>• Application</li> <li>• Project ID</li> <li>• Description</li> <li>• Status</li> <li>• Last Changed By</li> <li>• Last Changed Date</li> </ul>

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
View Results	Displays the available project list matching the filter criteria  The Next and Previous buttons are enabled to navigate if the search result has more than 14 records
Add	Navigates to the Project Index page (add mode) to add a new project for an application
Maintain	Navigates to the Project Index page (maintain mode) to edit the project description and project status

## Adding Projects

### Overview

The add process allows you to create a new project for an application.

Step	Action
1	On the Project Index page, click Add
<b>Result</b>	
The Project Index page (add mode) is displayed	
2	Enter the information for the new project
3	Click Process
<b>Result</b>	
The project is added to the database	

### Project Index page (add mode)

The screenshot shows the 'Project Index' page in 'add mode'. The page has a navigation bar with tabs: Allowable Values, Application/Environment, Application, Environment, Page, and Project. The 'Project' tab is selected. Below the navigation bar, the 'Project Information' section contains the following fields:

- Application: \* ALL (drop-down menu)
- Project Id: \* (text field)
- Description: \* (text field)
- Status: \* Active (drop-down menu)
- Last Changed By: (text field)
- Last Changed Date: (text field)

At the bottom of the form are three buttons: Process, Cancel, and Delete.

### Field Descriptions

Application	(drop-down list) Select the application from the drop-down list. The system populates the list with the existing applications on the AVM database.
Project Id	(text, 15 positions, alphanumeric, required) Enter the project ID. <b>NOTE:</b> This field gets enabled only in add mode.
Description	(text, 60 positions, alphanumeric, required) Enter the description of the associated project.

**Status** (drop-down list)  
Displays the status of the project. If the status is set to active, the Project ID will be available for selection. If the Project ID is set to disabled, the Project ID will not be available for selection in any of the pages in AVM .

**Last Changed By** (field)  
Displays the ID of the user who updated the project last time. The system automatically sets the value of this field as the ID of the user editing or adding the project. The field is empty in add mode and cannot be edited in maintain mode.

**Last Changed Date** (field)  
Displays the date when the project was updated last time. The system automatically sets the value of this field as the date when the project is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Adds a new project to the database
Cancel	Cancels the additions and navigates to the Project Index page

## Maintaining Projects

### Overview

The project maintenance allows you to edit the project description and project status only. You cannot change the project name or the associated application. You can also delete the selected project from the Project Index page (maintain mode).

Step	Action
1	From the Available Project list on the Project Index page, select the project you want to update/delete
2	Click <i>Maintain</i>
<b>Result</b>	
The Project Index page (maintain mode) is displayed	
3	<ul style="list-style-type: none"> <li>Modify the details and click <i>Process</i></li> <li>To delete a project, click <i>Delete</i></li> </ul>
<b>Result</b>	
The changes are updated/deleted.	

### Project Index page (maintain mode)

The screenshot shows a web application window titled 'ALLOWABLE VALUES MANAGEMENT'. The 'Project' tab is selected in the top navigation bar. The main content area displays 'Project Information' for a selected project. The details are as follows:

- Application: \* USI
- Project Id: \* 1220
- Description: \* User Security Interface Updates
- Status: \* Active (dropdown menu)
- Last Changed By: TECHWRT
- Last Changed Date: 07/14/2016

At the bottom of the form, there are three buttons: 'Process', 'Cancel', and 'Delete'.

### Field Descriptions

Application (field)  
Displays the name of the application.

Page Id (field)  
Displays the unique name of the page.

---

Description	(text, 60 positions, alphanumeric, required) Displays the description of the associated project. You can modify the description, as required.
Status	(drop-down list) Displays the status of the project. If the status is set to active, the Project ID will be available for selection. If the Project ID is set to disabled, the Project ID will not be available for selection in any of the pages in AVM .
Last Changed By	(field) Displays the ID of the user who updated the project last time. The system automatically sets the value of this field as the ID of the user editing or adding the project. The field is empty in add mode and cannot be edited in maintain mode.
Last Changed Date	(field) Displays the date when the project was updated last time. The system automatically sets the value of this field as the date when the project is added or updated. The field is empty in add mode and cannot be edited in maintain mode.

---

## Functions

The functions associated with the buttons on this page are described in the following table:

Button	Description
Process	Updates the changes to the database
Cancel	Cancels the changes and navigates to the Project Index page
Delete	Deletes a project

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