

Kernel Core — Step-by-step Walkthrough

Establish one organization and one person, connect their contact and geography information, and publish a state/reason contract for a consuming module.

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

Establish one organization and one person, connect their contact and geography information, and publish a state/reason contract for a consuming module.

Worked example and preparation

Use Example Services as the organization and Alex Example as the person. Search before creation. Select approved geography and relationship values already present in the training tenant.

Responsibilities

Role	Responsibility
Party steward	Creates and corrects business identities and associations.
Reference steward	Maintains controlled reference meanings.
Model author / reviewer	Proposes and independently decides a published state/reason contract.

Terms used in this module

Term	Meaning
Party	A stable identity representing a person or organization.
Association	A link from the party to a contact, address or classification.
State dimension	The business aspect being controlled, such as lifecycle.
Publication	An immutable model snapshot selected by a consumer.

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
Business identity and associations	<u>Register an organization without duplicating its identity</u> <u>Register a person and maintain structured names</u> <u>Add contacts and addresses to the correct party</u> <u>Build an organization hierarchy and classification</u> <u>Maintain geography and associate an address</u>

Business journey	Open the detailed steps
Controlled reference and state contract	<u>Maintain reference masters with their business meaning</u> <u>Define and publish state transitions and reason policy</u>

CHAPTER 3

Demonstration · Register an organization without duplicating its identity

Open	Who acts
Core → Party directory → Onboard organization	Party steward

Use the organization record wherever a responsible business identity is required. A tenant request later selects this record rather than creating a second copy.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Party kind	Select the offered organization kind.	Controls the organization subtype; do not choose Person.
Display / registered name	Example Services	Searchable business name; retain the authoritative legal meaning.
Email / Telephone / Website URL	Approved training contact values, or leave optional entries empty.	Contacts do not create a sign-in account or verify a mailbox.
Address line 1 / Locality / Postal code	Use the approved training address.	Address content and its geography association are separate records.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Search Party directory for the organization name and inspect likely matches.	Reuse an existing identity when it represents the same organization.
2	Open Onboard organization and complete the organization and required contact/address steps.	The review step shows the complete proposed aggregate.
3	Check the subtype, spelling and contact ownership before Create organization.	One submission creates the organization and its related records.
4	Return to Party directory and open the returned organization.	Its stable party reference, name and associated information can be read back.

Step	Demonstrator action	Point out on the screen
5	Open Organizations and the relevant contact/address association.	The relationships point to the same party, rather than unrelated duplicate entries.

SCREEN 1

Party directory and shared business records

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

MEDIFLEX Core > Party directory

MF

MEDIFLEX Core

Verified package

CORE JOURNEYS

Party directory

Onboard person

Onboard organisation

Add contacts or address

RELATED RECORD ADMINISTRATION

Address

Address assignments

Address geography

Classifications

Contact points

Contact assignments

Display names

Email contacts

Identifier metadata

Organisations

Organisation names

Party directory

MEDIFLEX Provider · local development workspace

Search records

Search by name, kind or ID

14 records

PERSON

E2E Core organisation 1789903322497

Edited

ORGANISATION

E2E Core person 1789903664452

PERSON

E2E Core organisation 1789903665110

Edited

ORGANISATION

E2E Core person 1789906385400

PERSON

E2E Core organisation 1789906385951

ORGANISATION

Dinesh Kumar

PERSON

Unnamed organisation

ORGANISATION

E2E Core organisation 1789906385951

Name

E2E Core organisation 1789906385951

Kind

ORGANISATION

Names (1)

NAME	DISPLAY NAME	VALID FROM	VALID TO
E2E Core organisation 1789906385951	Yes	—	—

Contacts (3)

TYPE	CONTACT	PREFERRED	VERIFICATION
EMAIL	core-1789906386075@example.test	Yes	—
TELEPHONE	+441234567890	Yes	—
WEB	https://example.test	Yes	—

Addresses (1)

ADDRESS	LOCALITY	POSTAL CODE	PRIMARY
1 Browser Test Lane	Test City	TEST	Yes

Classifications (0)

Evidence to show before continuing

Show the saved organization reference and its associated contact/address records. Explain that no IAM assignment or tenant activation was created.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The submission times out	Search and read back before submitting again; a missed response may still have created the party.
A duplicate is suspected	Compare kind and authoritative references; a similar display name alone is insufficient for deletion or merging.

Next part of the demonstration

Select the saved organization in Tenant onboarding when tenant setup is required. Continue person/contact maintenance in Core.

CHAPTER 4

Demonstration · Register a person and maintain structured names

Open	Who acts
Core → Party directory → Onboard person; People; Person names Party steward	

Keep the reusable person identity separate from the credentials and permissions that IAM will later administer.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Given name / Family name	Alex / Example	Structured name components; these are not role or department fields.
Display / registered name	Alex Example	The presentation label used to find the identity.
Party kind	The permitted person kind	Determines the subtype being created.
Email	An authorized training address	A contact association; it does not send enrollment by itself.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Search People and Party directory for the person.	Existing names and associations can be compared before creating another identity.
2	Open Onboard person, enter the structured names and review optional contact/address details.	The person subtype and display name agree.
3	Create the person once and retain the returned reference.	The person has its own party identity distinct from the organization.
4	Open Person names and Display names for that party.	Structured and presentation names can be inspected separately.

Step	Demonstrator action	Point out on the screen
5	For a correction, open the existing name action, check the latest version and save the authorized change.	The same party remains the subject; dependent references are preserved.

Evidence to show before continuing

Show two distinct party references, the structured person name and the absence of any automatic account grant.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The wrong party is selected	Cancel before saving and reopen the intended identity.
The update conflicts	Reload the current version, compare the intervening change and reapply only the intended correction.

Next part of the demonstration

Use IAM User Accounts for account creation and access assignment; maintain business identity facts here.

CHAPTER 5

Demonstration · Add contacts and addresses to the correct party

Open	Who acts
Core → Add contacts or address; Contact assignments; Address assignments	Party steward

A contact point describes a destination; an assignment establishes whose contact it is and its purpose.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Selected party	The saved person or organization	All new associations must point to this reference.
Contact kind / purpose	Choose the applicable approved value	Separates email, telephone and web meaning.

Input shown on screen	Enter or select	Explain its significance
Contact value	One destination in the appropriate field	Avoid pasting several unrelated destinations into one value.
Primary / preferred indicators	Set only according to the offered association rules	Adding a destination does not implicitly replace the current preferred one.
Address geography	An eligible place and level	Connects the address to the controlled geographic hierarchy.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Open the party and inspect current contact/address assignments.	You can distinguish a new destination from a correction to an existing one.
2	Use Add contacts or address with the intended party reference.	The form remains bound to that party.
3	Enter the new contact or address and its applicable purpose.	The review displays the destination and owning party together.
4	Save and inspect Email contacts, Telephone contacts or Web contacts as appropriate.	The destination exists in the correct subtype.
5	Inspect Contact assignments / Address assignments and preferred indicators.	The new information is linked with the intended use and does not silently displace another contact.

Evidence to show before continuing

Show destination, assignment, owning party and purpose as separate but linked facts.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The contact exists but is absent from the party	Inspect the assignment, not just the standalone destination.
Geography is unavailable	Resolve the approved place hierarchy before assigning; a text locality is not a controlled place reference.

Next part of the demonstration

Return to the party record and confirm the user-facing contact. Use downstream enrollment or notifications only through their owning modules.

Demonstration · Build an organization hierarchy and classification

Open	Who acts
Core → Relationship catalogs; Define relationship type; Link organizations; Organization hierarchy; Classification workspace	Relationship steward

Use explicit direction and relationship meaning. A parent organization and a classification describe different business facts.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Relationship type	Choose a reviewed catalog value	Determines the allowed relationship semantics.
Source / target organization	Select the two saved identities	Direction matters: parent and child must not be reversed.
Applicable dates	The period offered by the relationship form	An ended relationship remains part of historical interpretation.
Classification / purpose	Choose the controlled category and its use	Classification does not create an IAM role or a tenant entitlement.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Inspect the relationship catalog before creating a link.	The selected type matches the intended business meaning.
2	Open Link organizations and select the source and target in the correct direction.	Both references identify saved organizations.
3	Enter the applicable period and reason, then save through the offered governed action.	A specific relationship record is returned.
4	Open Organization hierarchy and follow the link from each relevant node.	The visible parent/child order agrees with the saved relationship.
5	Assign a controlled classification separately in Classification workspace.	The organization can be categorized without changing its hierarchy.

Evidence to show before continuing

Show the hierarchy direction, the classification and their independent references.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The proposed link creates a cycle or invalid direction	Correct the relationship; do not create a duplicate organization to evade validation.
An old relationship is no longer valid	Use its supported ending action and preserve the earlier record.

Next part of the demonstration

Use these organization references in tenant setup and other consumers; administer user access separately in IAM.

CHAPTER 7

Demonstration · Maintain geography and associate an address

Open	Who acts
Core → Define geography level; Define place; Place hierarchy; Address geography workspace	Geography steward

Controlled geography supports consistent address interpretation. A postal locality typed in an address does not establish its place hierarchy.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Geography level	The approved country/state/local level	Defines what kind of place is represented.
Place code / name	A unique controlled identifier and readable name	The identifier is used for selection; the name is presentation.
Parent place	An eligible existing parent	Determines placement in the hierarchy.
Address reference	The selected saved address	The association must target the intended version/record.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Inspect existing levels and places to avoid duplicates.	The necessary parent structure is known.
2	Define a missing eligible level or place through the offered form.	The new place has the correct type and parent.
3	Open Place hierarchy and inspect the full parent path.	The path is meaningful and contains no unintended branch.
4	Use Assign address geography for the saved address.	The address receives the intended controlled place reference.
5	Read back the address in Address geography workspace.	Textual address and controlled geography can be reconciled together.

SWOMB

MEDIFLEX Core > Place hierarchy

MF

MEDIFLEX Core

Verified package

CORE JOURNEYS

Party directory

Onboard person

Onboard organisation

Add contacts or address

RELATED RECORD ADMINISTRATION

Address

Address assignments

Address geography

Classifications

Contact points

Contact assignments

Display names

Email contacts

Identifier metadata

Organisations

Organisation names

Verified metadata package: mediflex-core

SHA-256 verified · API + screen activated atomically

Place hierarchy

Explore named places within configured geographic levels.

Find place

Browser territory A 1789914421054

Browser territory A 1789914421054 · Browser territory 1789914421054

Parent places (0)

No relationships recorded.

Browser territory A 1789914421054 · Browser territory 1789914421054

Explore the incoming and outgoing relationships. Select a linked place to follow the hierarchy.

Child places (1)

Browser district B 1789914421054

Contains

MEDIFLEX Core

Application workspace

Core geography: inspect the saved place hierarchy before associating an address · application capture with illustrative records; select to enlarge.

Evidence to show before continuing

Show the place path and address association, not just a matching typed locality.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The parent cannot be selected	Check its active/effective state and compatible level.
A country/state needs temporal correction	Use the owning Country/State TimeVault journey and inspect the effective date before relying on it.

Next part of the demonstration

Return to the party/address consumer. Follow the TimeVault handbook for time-based Country/State changes.

CHAPTER 8

Demonstration · Maintain reference masters with their business meaning

Open	Who acts
Core → Reference Masters → selected master	Reference steward

Maintain reusable controlled values once. Each reference family has a specific purpose; changing a label does not change a consumer’s state machine.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Code / name / description	Unique code, business label and precise explanation	Avoid reusing a code for a different meaning.
Locale / Time Zone / Date Time Format / Number Format	Select the family matching the presentation requirement	A format describes display; a time zone determines interpretation.
Contact Kind / Party Kind / Scope Kind	Choose the appropriate semantic family	These describe different entities and uses.
Command Status / Process State / Record State / Event Type	Maintain the specific controlled lifecycle vocabulary	A new reference value alone does not introduce an executable transition.
Active indicator	Retain the intended availability state	Inactive definitions should disappear from ordinary new selection while history is retained.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Open the relevant master and search its code and meaning.	A synonymous existing definition can be reused.
2	Open the current record or permitted create action and complete its declared fields.	The code belongs to the correct family.
3	Review active state and dependency implications before saving/submitting.	The change does not silently redefine an existing business contract.
4	Complete any required review on the owning record.	The effective row reflects the approved change.
5	Inspect a consumer lookup and then the original history.	New selection and preserved references behave consistently.

Evidence to show before continuing

Show the correct master family, saved state and a consumer lookup containing the eligible value.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A value is still missing in a consumer	Check consumer filtering, tenant scope and effective status before creating another code.
A used value must be withdrawn	Use inactivation rather than replacing its code with a new meaning.

Next part of the demonstration

Use State Model Designer and publication for executable state/reason behavior.

CHAPTER 9

Demonstration · Define and publish state transitions and reason policy

Open	Who acts
Core → State Model Designer; Reason Policy Designer; Model publications	Model author and independent reviewer

Publish an exact state/reason contract for a named consumer so later edits to authoring data do not silently change running behavior.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
State dimension / state value	The lifecycle aspect and allowed states	States in different dimensions are not interchangeable.
Transition	Allowed prior state, action and resulting state	The transition defines a permitted move, not its execution.
Reason domain / reason applicability	Allowed reason and narrative requirements	A reason can be restricted to a particular action or transition.
Consumer / publication reference	The designated consuming module and returned snapshot	The consumer binds an exact approved version/hash.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Define the required states and transitions in the selected dimension.	The initial, terminal and allowed intermediate moves can be explained.
2	Define reason values and applicability, including required narrative.	A reason is valid only in its intended context.
3	Propose model publication for the chosen consumer.	The proposal captures the exact source definitions.
4	Have the eligible independent reviewer compare and decide that proposal.	Approval yields a controlled publication reference and hash.
5	Use Check a published transition with a valid action/reason combination.	The evaluation allows the configured move.
6	Repeat the non-mutating check with a disallowed transition or missing required narrative.	The evaluation rejects it without changing a business record.

SCREEN 2

Model publications: selected consumer/version and immutable snapshot details; historical local test interface

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

 MEDIFLEX Core > Model publications

 MEDIFLEX Core
Verified package

Find a workspace

CORE JOURNEYS5

Party directory

Onboard person

Onboard organisation

Add contacts or address

Party assurance

RELATED RECORD ADMINISTRATION17

Address

Address assignments

Address geography

Classifications

Contact points

Contact assignments

Display names

Email contacts

Identifier metadata

Organisations

Organisation names

Organisation relationships

Configuration details

Model publications

Review exact definitions, independent decisions and version-bound use. Authoring changes require a new publication.

Submitted0View records →

Published4View records →

Rejected1View records →

Switch local identity ↗

All statuses

Refresh

CONSUMER AND VERSION	STATE
concurrency.55cf181b1a · v1 · PUBLISHED	Published
browser.model.17899689... · v1 · PUBLISHED	Published
proof.3a59dc6b53 · v3 · PUBLISHED	Published
proof.3a59dc6b53 · v2 · PUBLISHED	Published
proof.3a59dc6b53 · v1 · REJECTED	Rejected

5 visible records

Request details

Close details

Published

State model

Revised publication acceptance 3a59dc6b53

Reason domain

Publication reasons 3a59dc6b53

Version

1

Snapshot SHA-256

7b77954f1a8bc199b12bc0399a0c031918bbc874c027f97ea500a6957d228588

Request reason

Browser acceptance of reviewed Core model 1789968908590

Review reason

Independent browser review of states and reason mappings

Evidence to show before continuing

Show one allowed and one rejected evaluation plus the immutable published reference.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
Sources changed after proposal	Prepare a successor proposal; do not approve a stale snapshot.
The consumer still uses old behavior	Inspect its bound publication ID/hash and adopt the new publication through its supported change process.

Next part of the demonstration

Hand the publication reference to the consuming module, which still owns business execution and authorization.

Kernel · Demo walkthrough

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Cross-module handoffs and the record references to retain

Next module	What to carry across	Open the related demonstration
Tenant Engine	Reuse the responsible organization reference.	Tenant Engine
TimeVault	Govern effective Country/State values.	TimeVault
Regulix	Bind the exact state/reason publication at the business owner boundary.	Regulix
IAM	Create authentication and grants separately from business identity.	IAM

Problem → responsible action → safe continuation

Procedure	Observed problem	Recovery
Register an organization without duplicating its identity	The submission times out	Search and read back before submitting again; a missed response may still have created the party.
Register an organization without duplicating its identity	A duplicate is suspected	Compare kind and authoritative references; a similar display name alone is insufficient for deletion or merging.
Register a person and maintain structured names	The wrong party is selected	Cancel before saving and reopen the intended identity.
Register a person and maintain structured names	The update conflicts	Reload the current version, compare the intervening change and reapply only the intended correction.
Add contacts and addresses to the correct party	The contact exists but is absent from the party	Inspect the assignment, not just the standalone destination.
Add contacts and addresses to the correct party	Geography is unavailable	Resolve the approved place hierarchy before assigning; a text locality is not a controlled place reference.
Build an organization hierarchy and classification	The proposed link creates a cycle or invalid direction	Correct the relationship; do not create a duplicate organization to evade validation.
Build an organization hierarchy and classification	An old relationship is no longer valid	Use its supported ending action and preserve the earlier record.
Maintain geography and associate an address	The parent cannot be selected	Check its active/effective state and compatible level.

Procedure	Observed problem	Recovery
Maintain geography and associate an address	A country/state needs temporal correction	Use the owning Country/State TimeVault journey and inspect the effective date before relying on it.
Maintain reference masters with their business meaning	A value is still missing in a consumer	Check consumer filtering, tenant scope and effective status before creating another code.
Maintain reference masters with their business meaning	A used value must be withdrawn	Use inactivation rather than replacing its code with a new meaning.
Define and publish state transitions and reason policy	Sources changed after proposal	Prepare a successor proposal; do not approve a stale snapshot.
Define and publish state transitions and reason policy	The consumer still uses old behavior	Inspect its bound publication ID/hash and adopt the new publication through its supported change process.

CHAPTER 12

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
Register an organization without duplicating its identity	Show the saved organization reference and its associated contact/address records. Explain that no IAM assignment or tenant activation was created.
Register a person and maintain structured names	Show two distinct party references, the structured person name and the absence of any automatic account grant.
Add contacts and addresses to the correct party	Show destination, assignment, owning party and purpose as separate but linked facts.
Build an organization hierarchy and classification	Show the hierarchy direction, the classification and their independent references.
Maintain geography and associate an address	Show the place path and address association, not just a matching typed locality.
Maintain reference masters with their business meaning	Show the correct master family, saved state and a consumer lookup containing the eligible value.
Define and publish state transitions and reason policy	Show one allowed and one rejected evaluation plus the immutable published reference.

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.