

Kernel — Cross-module Walkthroughs

Follow a business task across its owning components, retaining the record and decision references at each handoff.

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

Contents

1. Choose a cross-module task
2. Organization to usable tenant and user access
3. Source to reviewed content and scheduled output
4. MEDES case to reviewed evidence and correspondence
5. Check the complete handoff chain
6. Current governance and documentation handoffs

Choose a cross-module task

Use this crosswalk to follow responsibilities and handoffs across Kernel Core, Tenant Engine, Tenant Control Plane, IAM, Axis, TimeVault, Regulix, Pulse, Vista, Enterprise Scheduler, Custodia, MEDES, Nexora and Kernel Atlas.

Begin with the owner of the business record. Confirm its current version, permissions, review decision and dependency references before continuing in the next module.

Organization to usable tenant and user access

Create or reuse the responsible organization

Use	Instruction
Screen / task	Party directory → Onboard person / Onboard organization
Record to retain	Organization/party ID
Check before leaving this module	Tenant onboarding uses that exact business identity.

[Open the complete Kernel Core procedure](#) · [Open its step-by-step routes](#)

SCREEN 1

Party directory and shared business records

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

SWOMB

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 types

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)

Register and prepare the tenant

Use	Instruction
Screen / task	Tenant onboarding → Onboarding requests
Record to retain	Tenant request and onboarding-case IDs
Check before leaving this module	Complete identity, commercial, configuration and domain owner steps in the Tenant walkthrough.

[Open the complete Tenant Engine procedure](#) · [Open its step-by-step routes](#)

Kernel · Demo walkthrough

3 / 24

Tenant onboarding review

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

SWOMB

MEDIFLEX Core > Onboarding requests

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

Operational records

Verified metadata package: mediflex-core

SHA-256 verified · API + screen activated atomically

Onboarding requests and readiness

Review saved requests, their audit trail and outstanding approval or bootstrap requirements.

Prepare onboarding

Search records

Search by name, kind or ID

2 records

Browser Tenant 1789908938223

BROWSER_TENANT_1789908938223 · SUBMITTED · E2E Core organisation 1789902688358 Edited · Browser operating unit 1789908938223 · 2026-09-20T18:25:39.887372+05:30

Browser Tenant 1789908847919

BROWSER_TENANT_1789908847919 · SUBMITTED · E2E Core organisation 1789902688358 Edited · Browser operating unit 1789908847919 · 2026-09-20T18:24:10.160048+05:30

Browser Tenant 1789908938223

Proposed tenant

Browser Tenant 1789908938223

Request state

SUBMITTED

Tenant type

Browser operating unit 1789908938223

Code

BROWSER_TENANT_1789908938223

Organisation

E2E Core organisation 1789902688358 Edited

Last saved

2026-09-20T18:25:39.887372+05:30

Readiness and approval (3)

REQUIREMENT	STATUS	DETAILS
Independent approval	PENDING	A separate authorized approver must review this request.
Tenant bootstrap	BLOCKED	Organisation binding, target identity and trusted actor provisioning require the governed bootstrap path.
Tenant type governance	BLOCKED	Selected type is DRAFT; catalogue approval is required.

Request history (4)

EVENT	WHEN	VERSION
SAVE	2026-09-20T18:25:38.638378+05:30	1
SAVE	2026-09-20T18:25:39.739352+05:30	2

Activate eligible tenant context

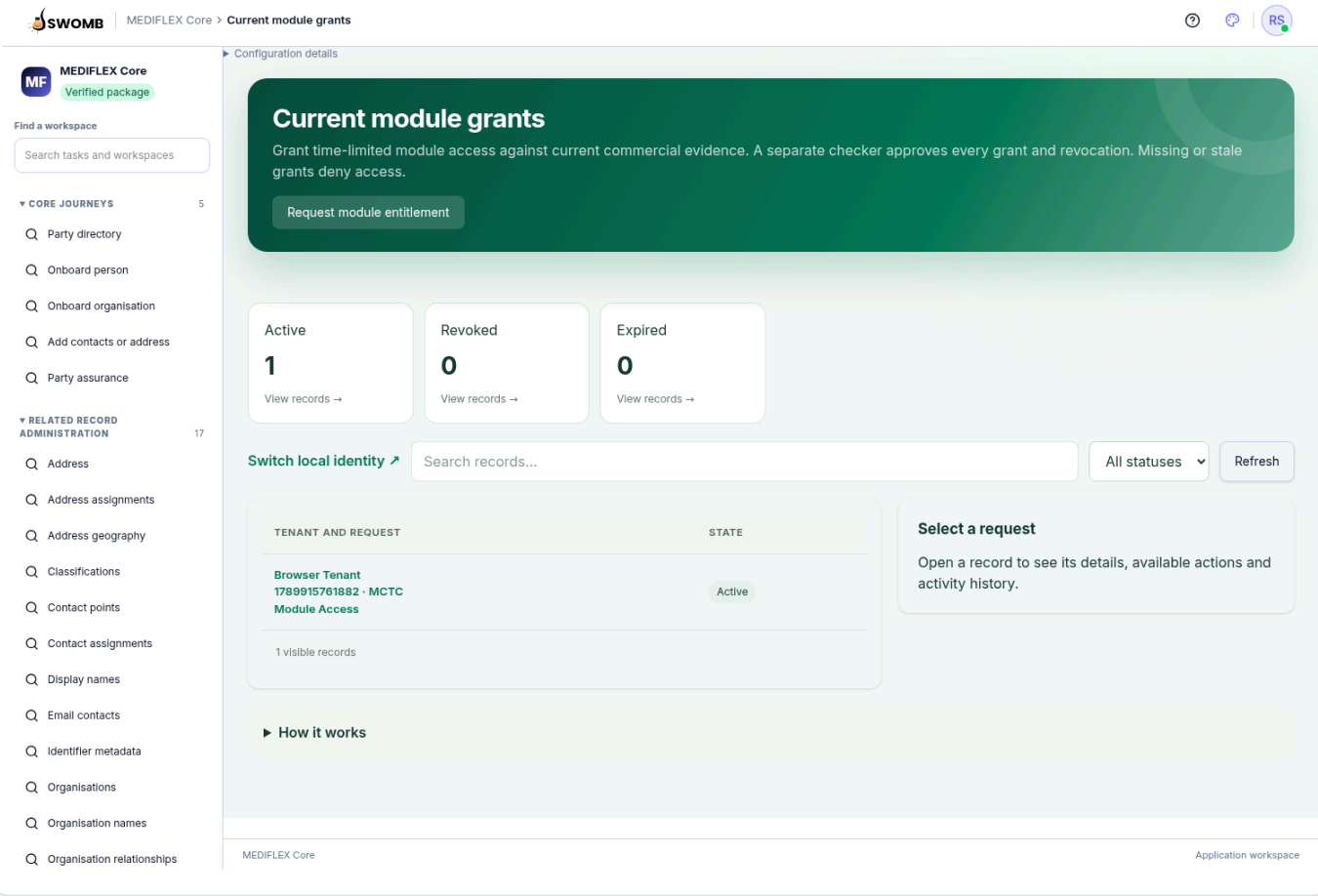
Use	Instruction
Screen / task	Current module grants → tenant lifecycle
Record to retain	Lifecycle decision and current tenant/module evidence
Check before leaving this module	Registration alone does not establish active operation.

[Open the complete Tenant Control Plane procedure](#) · [Open its step-by-step routes](#)

SCREEN 3

Current module grants: entitlement state and request entry; historical local test interface

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



Set up domains, profiles, roles and mappings

Use	Instruction
Screen / task	Authorization → Domains → Create Domain
Record to retain	Reviewed master and mapping references
Check before leaving this module	Complete the access-setup route, including permissions, menus and Axis controls.

Open the complete Identity and Access Management procedure · Open its step-by-step routes

SCREEN 4

Create Domain: complete the actual master form

Application screen with illustrative data · click to enlarge

Kernel

MediFlex

Operations Workspace

Search screens and work areas...

Ctrl K

🔔

💬

🔄

Quick Links

DM Demo Maker

IAM demonstration maker

Your Workspace

Find a screen...

User Administration

Authorization

Domains

Profiles

Roles

Menu Access

User Access Hierarchy

Access Governance

System Access

Active Access Profile

IAM demonstration maker

Menus reflect this profile's permissions.

MediFlex

Authorization

Domains

View

A

B

C

D

E

Overview

Back

Identity & access

Create Domain

Domain Code *

#

DEMO_OPERATIONS

Domain Name *

👤

Operations

Access Reason

▼

Select Access Reason

▼

Domain Type *

▼

Department Division

▼

Provider

#

Select Provider

▼

Owner Reference

#

Enter Owner Reference

Description *

☰

Client demonstration: reference data access in the Operations domain.

✎

Remarks

☰

Enter Remarks

✎

Start Date ⓘ

📅

MM/DD/YYYY

📅

End Date ⓘ

📅

MM/DD/YYYY

📅

Business Reason *

☰

Client demo: configure reviewed reference-data reader access.

✎

✕

Cancel

💾

Save

Save submits the complete record for independent approval.

- Domain Type and Description are part of the master definition.
- Save creates an approval proposal, not an immediate universal access grant.

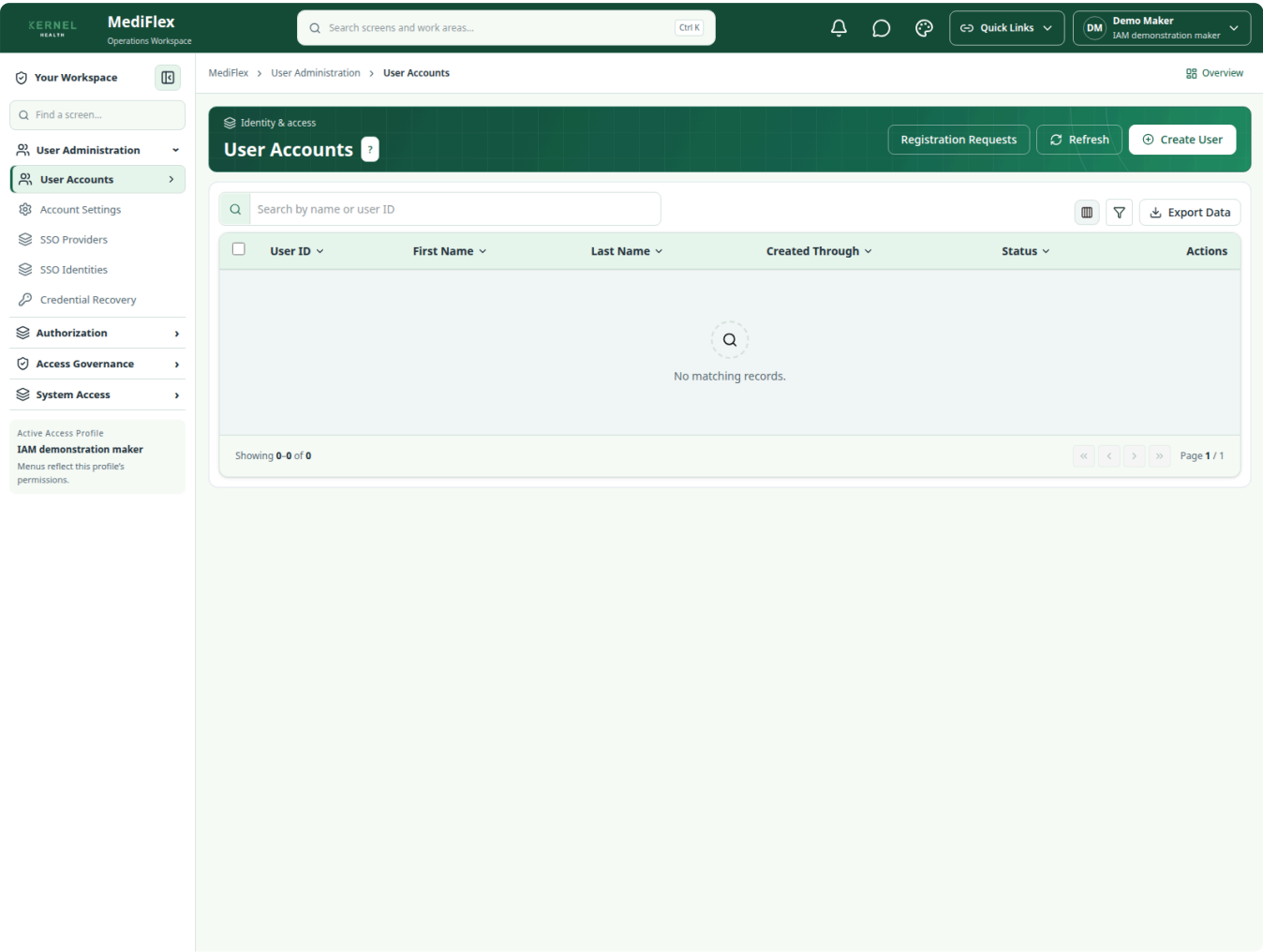
Create or enroll the user

Use	Instruction
Screen / task	User Administration → User Accounts → Create user
Record to retain	Account and access request/decision references
Check before leaving this module	Choose administrator-created or self-registered onboarding, then verify allowed and denied behavior.

SCREEN 5

User Accounts: start administrative onboarding

Application screen with illustrative data · click to enlarge



- Create user is the administrator-led entry point.
- Created through distinguishes Admin-created from Self-registered accounts.

Confirm screen and control presentation

Use	Instruction
Screen / task	Screens → selected screen and linked records
Record to retain	Screen/experience and IAM bridge references

Use	Instruction
Record to retain	Connection revision, test and publication references
Check before leaving this module	Use the intended authentication reference and tenant scope.

[Open the complete Vista procedure](#) · [Open its step-by-step routes](#)

SCREEN 7

Connection definition and authentication references

Existing application recorded test · example records may differ from your tenant · click to enlarge

Kernel Health

MediFlex

Operations Workspace

Search screens and work areas...

Ctrl K

Quick Links

Studio Maker Platform Demo Maker

Your Workspace

Find a screen...

Business journeys

My Dashboard

Core

Pulse

Vista

1 · Sources & datasets

Available Datasets

2 · Reports & visuals

3 · Dashboard catalog

4 · Runs & results

Nexora

Active Access Profile

Platform Demo Maker

Menus reflect this profile's permissions.

MediFlex > Vista > 1 · Sources & datasets > Available Datasets

View

A

B

C

D

E

Overview

Vista

1 · Sources & datasets

2 · Reports & visuals

3 · Dashboard catalog

4 · Runs & results

Back

Vista

Create connection

Save Connection Draft

Connect to a JSON API using a server-approved HTTPS host. Enter credential references only; provider passwords and tokens stay in the private credential store.

Connection name

Browser source qbox

Connection code

BROWSER_CONN_QBOX_1792320702552

HTTPS endpoint

https://jsonplaceholder.typicode.com/posts

Authentication and response

Authentication

Public API — no credentials

JSON row path

data.records (blank for a root array)

Maximum response rows

100

Data scope

Row scope

Public reference data

Timeout in seconds

15

Tenant matching uses the Kernel tenant ID. Public reference data must be suitable for every authorized reader in this tenant. Responses are limited to 500 rows and 2 MB; oversized responses are rejected. This connection uses an explicit snapshot, refreshed from its grid row.

Data access policy

The external endpoint and credential reference belong to the connection.

The screenshot uses an earlier test API; use your approved demo endpoint.

Kernel · Demo walkthrough

9 / 24

Define the business source

Use	Instruction
Screen / task	Vista → Sources & datasets → Source definitions → New source
Record to retain	Source definition and current refresh result
Check before leaving this module	Inspect exposed fields and current data before modeling.

[Open the complete Vista procedure](#) · [Open its step-by-step routes](#)

SCREEN 8

Source Definitions is the named-source master

Existing application recorded test · example records may differ from your tenant · click to enlarge

Kernel Health

MediFlex

Operations Workspace

Search screens and work areas...

Ctrl K

Quick Links

Studio Maker

Platform Demo Maker

Your Workspace

Find a screen...

Business journeys

My Dashboard

Pulse

Vista

1 · Sources & datasets

Available Datasets

2 · Reports & visuals

3 · Dashboard catalog

4 · Runs & results

Nexora

Active Access Profile

Platform Demo Maker

Menus reflect this profile's permissions.

MediFlex

Vista

1 · Sources & datasets

Available Datasets

Overview

Vista

1 · Sources & datasets

2 · Reports & visuals

3 · Dashboard catalog

4 · Runs & results

Connections

Source Definitions

Datasets

Vista

Source Definitions

Refresh

New Source

Search loaded records...

Source Name	Code	Connection / Provider	Version	Status	Actions
Report Catalogue	VISTA_CATALOGUE	MediFlex catalogue	—	PUBLISHED	Preview Create Dataset
External test records	NX_7fc6ad11372044098b31152237ecb8e0	MediFlex	1	PUBLISHED	Preview Create Dataset
Model albums source	NX_9d5bed372e2c4202b854836e5d7f0d3e	MediFlex	1	PUBLISHED	Preview Create Dataset

Showing 1-3 of 3

- Connections, Source Definitions and Datasets are separate tabs.
- New source defines a reusable field set from a connection; Create dataset consumes a published source.

Build and independently review datasets

Use	Instruction
Screen / task	Vista → Sources & datasets → Datasets → New dataset
Record to retain	Published dataset revision and preview/decision references
Check before leaving this module	Select only authorized fields and supported joins; use the same reviewed contract downstream.

[Open the complete Vista procedure](#) · [Open its step-by-step routes](#)

Author and publish a report and dashboard

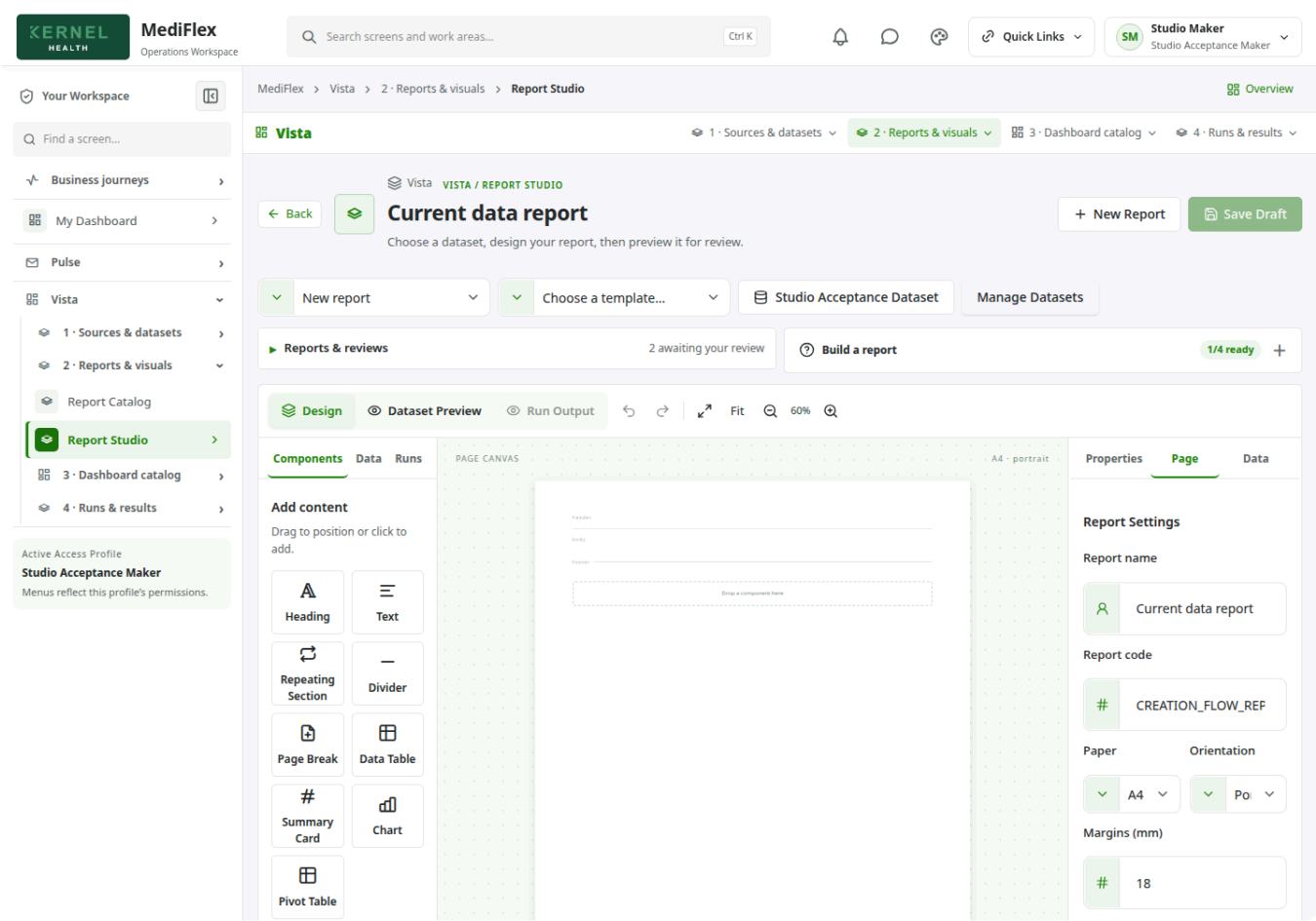
Use	Instruction
Screen / task	Vista → Reports & visuals → Report Studio → New report
Record to retain	Report/dashboard versions, current preview and independent decision
Check before leaving this module	Use the Vista report route followed by the dashboard route if required.

[Open the complete Vista procedure](#) · [Open its step-by-step routes](#)

SCREEN 9

Report Studio starts with a blank composition

Existing application recorded test · example records may differ from your tenant · click to enlarge



- Components are on the left; selected block and page settings are on the right.
- Dataset selection stays visible; Save draft creates the version to preview and review.

Author an email or letter with the selected data

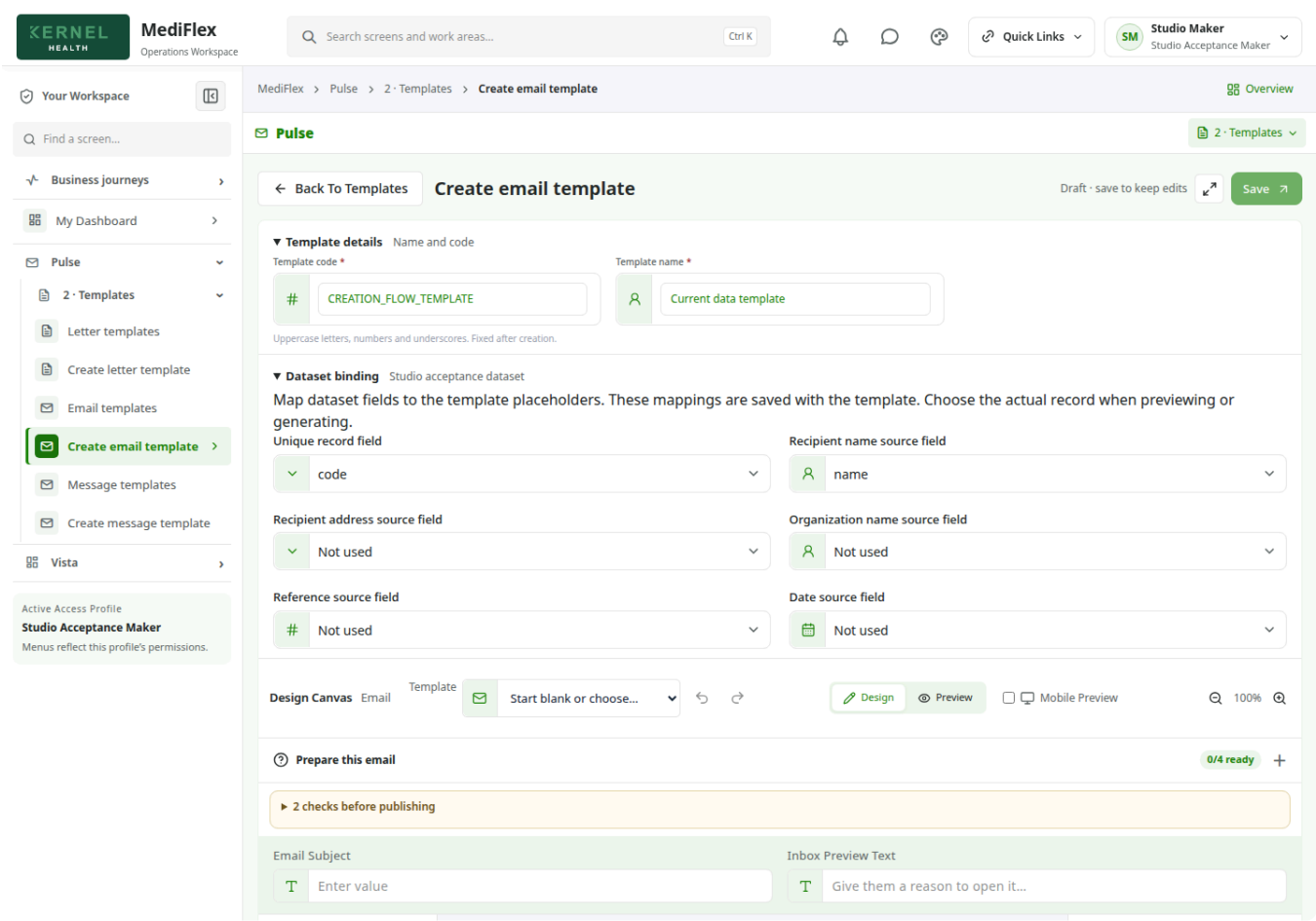
Use	Instruction
Screen / task	Pulse → Templates → Email templates → New template
Record to retain	Template version, current-record preview and independent decision
Check before leaving this module	Use the corresponding Pulse email or letter route; verify repeating rows and page behavior.

[Open the complete Pulse procedure](#) · [Open its step-by-step routes](#)

SCREEN 10

Email Studio: saved dataset binding, subject and preview controls

Existing application recorded test · example records may differ from your tenant · click to enlarge



- A design or mobile preview helps composition.
- The review gate uses Render saved preview after saving.

Define and publish the execution job

Use	Instruction
Screen / task	Scheduler → Job Definitions → New job
Record to retain	Operation, Run as identity, pinned artifact version and job review
Check before leaving this module	Select the operation matching the output. Refresh → report order does not attach a report to an email.

Open the complete Enterprise Scheduler procedure · Open its step-by-step routes

SCREEN 11

Job inputs bind a named published report

Existing application recorded test · example records may differ from your tenant · click to enlarge

Kernel Health

MediFlex

Operations Workspace

Your Workspace

Find a screen...

Business journeys

My Dashboard

Core

Scheduler 3

Job Definitions

Schedules

Job Runs

Pulse

Vista

Nexora

Active Access Profile

Platform Demo Maker

Menus reflect this profile's permissions.

Search screens and work areas...

Ctrl K

🔔

💬

🔄

Quick Links

Studio Maker

Platform Demo Maker

Job name

Browser scheduled artifact qbox 1792317514

Job code

BROWSER_QBOX_1792317514167

Description

Enter description

Published content

Published report

Karthi_Vista_Test · KARTHI_VISTA_TEST · v1

This job uses version 1 of Karthi_Vista_Test. A later publication requires a new job revision and review.

Inputs

Use a value or select one record from a published dataset. Dataset values are refreshed and validated when the job runs.

Search loaded records...

Input	Source	Value Or Field	Selected Record	Actions
Reason	Value	Scheduled reporting browser acceptance		🗑️

Showing 1-1 of 1

« < > » Page 1 / 1

Input name

Choose an input

Input source

Value

Value type

TEXT

Value

T

+ Add Input

Execution policy

Timeout (seconds)

300

Maximum attempts

1

Initial retry delay (seconds)

30

Maximum retry delay (seconds)

300

If a previous run is still active

Wait in queue

The registered operation supports a stable retry key.

- The selector supplies the version and content hash automatically.
- Execution policy is saved with the job definition.

Run once, inspect results, then schedule

Use	Instruction
Screen / task	Scheduler → Schedules → New schedule
Record to retain	Run, producer result, schedule and upcoming occurrence references
Check before leaving this module	Inspect actual output before enabling recurrence. Handle retry, rerun and uncertain side effects through the Scheduler recovery route.

SCREEN 12

Schedule timing, calendar and missed-execution behavior

Existing application recorded test · example records may differ from your tenant · click to enlarge

Kernel Health

MediFlex

Operations Workspace

Find a screen...

Business journeys

My Dashboard

Core

Scheduler 7

Job Definitions

Schedules

Job Runs

Business Calendars

Queues & Workers

Backfills

Batches

Pulse

Vista

Nexora

Active Access Profile

Platform Demo Maker

Menus reflect this profile's permissions.

MediFlex

Core

Schedules

View

A

B

C

D

E

Overview

Back

Core

Create schedule

Save Draft

Job and schedule details

Published job version

Schedule name

Schedule code

Description

The schedule keeps this exact job version. Saving a draft does not enable execution.

Business calendar

Published business calendar

Optionally limit this schedule to approved working hours and holidays. The schedule keeps the selected calendar version.

Timing

Trigger type

Time zone

Execution date and time (UTC)

Dates above use UTC. Preview also shows them in the selected time zone. Fixed intervals measure elapsed seconds and do not shift with daylight saving.

Missed executions

When the scheduler resumes after downtime

Maximum occurrences per batch

Late execution grace (seconds)

Choose the execution date and time in UTC.

- A schedule pins an exact published job version.
- Saving a draft does not enable execution.

Inspect configured transport where needed

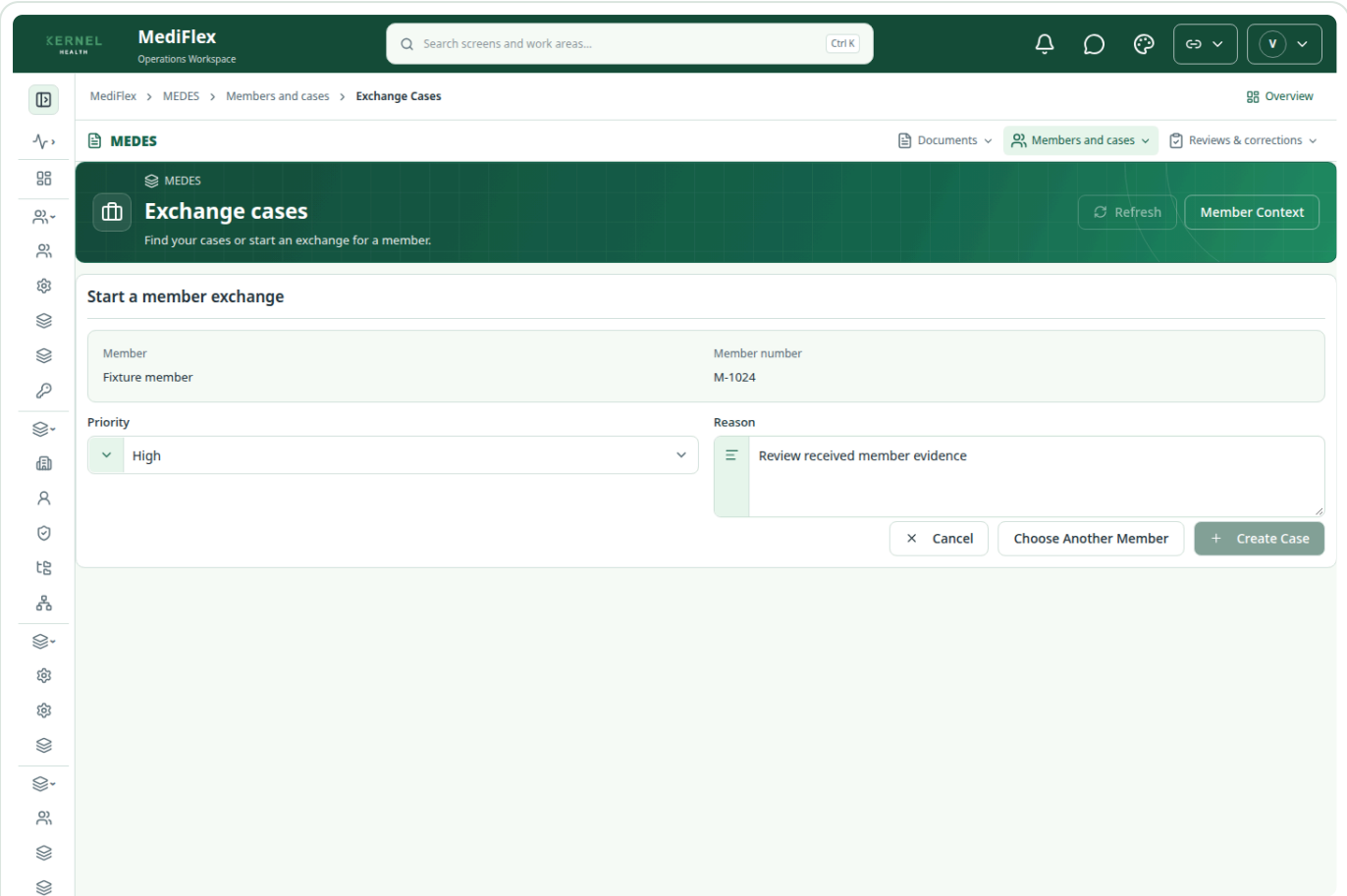
Use	Instruction
Screen / task	Delivery attempts and inspect the local receipt and captured-output hash
Record to retain	Generation and separate delivery-attempt/provider references
Check before leaving this module	Generated, provider accepted and delivered are distinct results. Keep unconfigured fax/print-mail blocked.

CHAPTER 4

MEDES case to reviewed evidence and correspondence

Find the current member and open the case

Use	Instruction
Screen / task	MEDES → Members and cases → Member context, or use Client Information / Related Documents where that entry is available.
Record to retain	Member and case references
Check before leaving this module	Keep this case as the context throughout the route.



SCREEN 13

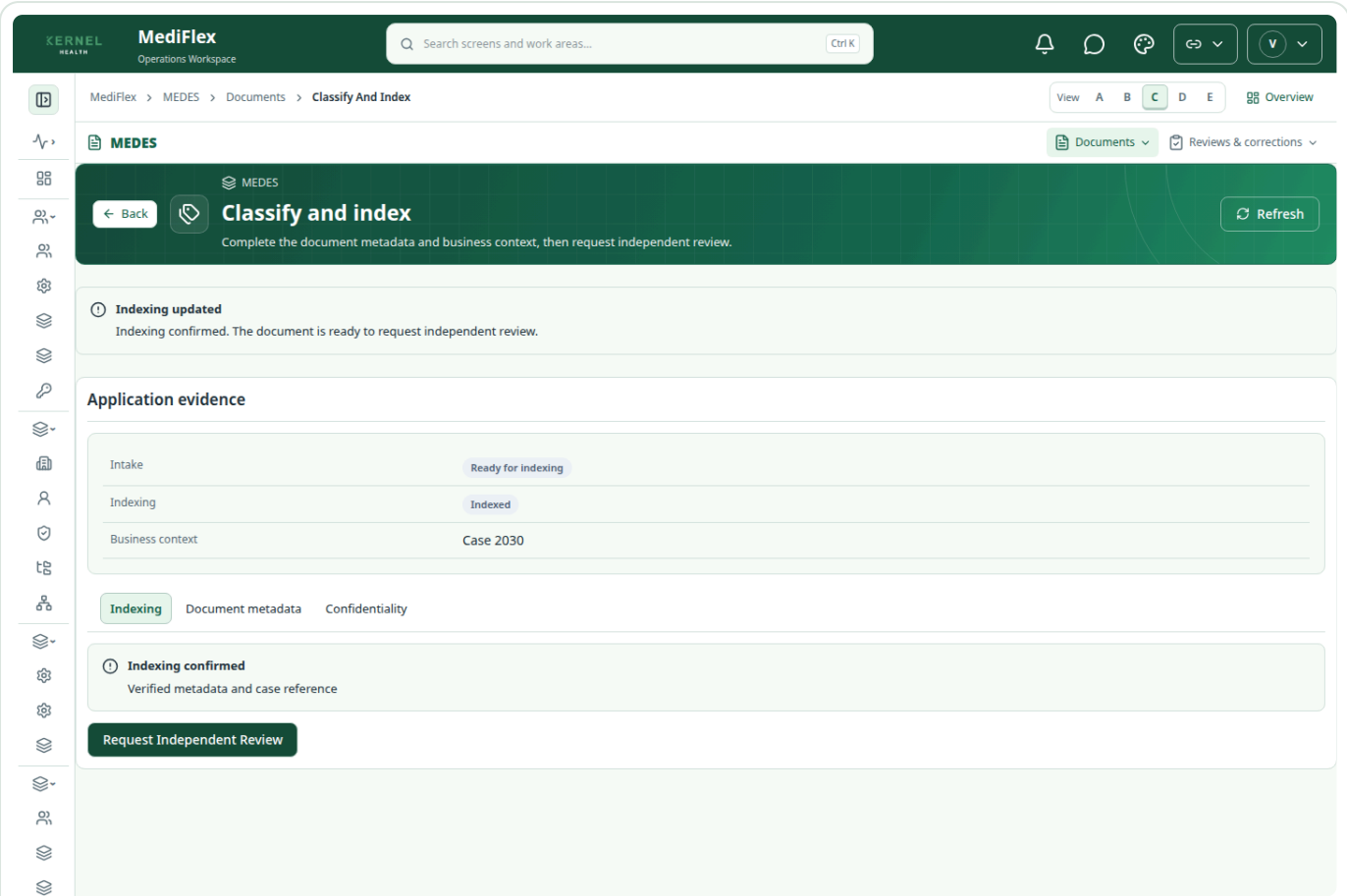
Create an exchange case for the selected current member.

Illustrative application screen · select to enlarge.

Receive, index and classify evidence

Use	Instruction
Screen / task	MEDES → Documents → Document Intake Queue
Record to retain	Intake ID, original document and child references if split
Check before leaving this module	A secure partner upload is an alternate capture path, not an additional compulsory upload.

[Open the complete MEDES procedure](#) · [Open its step-by-step routes](#)



SCREEN 14

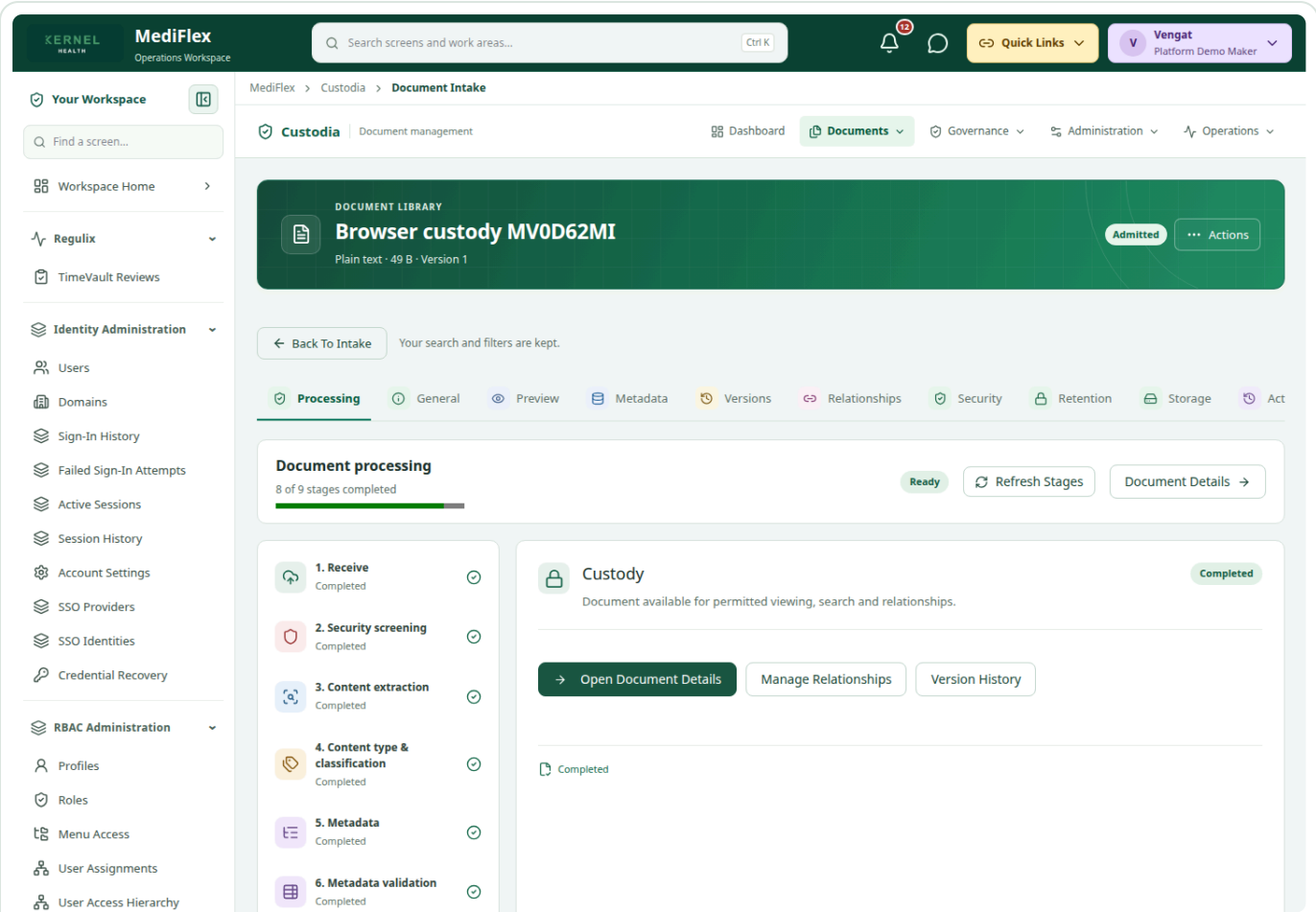
Indexed document ready to request independent review. The sample uses an existing case reference.

Illustrative application screen · select to enlarge.

Inspect document admission and custody

Use	Instruction
Screen / task	the selected document’s processing detail and confirm its document ID and exact version.
Record to retain	Document/version/hash and processing receipt
Check before leaving this module	Custodia protects the bytes; technical admission does not complete MEDES business review.

[Open the complete Custodia procedure](#) · [Open its step-by-step routes](#)



SCREEN 15

Document processing rail and custody detail for the selected version.

Illustrative application screen · select to enlarge.

Complete independent evidence review

Use	Instruction
Screen / task	Document reviews → Requested by me to track the submission
Record to retain	Task, decision and exact reviewed version
Check before leaving this module	Regulix coordinates eligible work; use the originating MEDES work item and the assigned independent reviewer.

Open the complete MEDES procedure · Open its step-by-step routes

Complete assigned case work

Use	Instruction
Screen / task	the correct exchange case and confirm that the member reference is current.
Record to retain	Outcome, effective date and evidence references
Check before leaving this module	Resolve missing evidence or a returned decision before completing the business task.

Open the complete MEDES procedure · Open its step-by-step routes

Eligibility Review

Review stage Eligibility review

Task status Claimed

Assigned to Eligibility reviewer

Priority High

Due No due date set

Editing Available

Next action

Release
Hold
Request Information
Escalate
Record Eligibility Decision

Record eligibility decision for case MX-LOCAL-CASE.

Eligibility Outcome *

▼
Approved
▼

Effective Date *

📅
10/13/2026
🗓️

Evidence reviewed

☒ Identity	☒ Residency	☒ Citizenship
☒ Income	☒ Medical Records	

Decision Reason

☰
Independent checks complete

✕ Cancel
Record Eligibility Decision

Work history

Show History

SCREEN 16

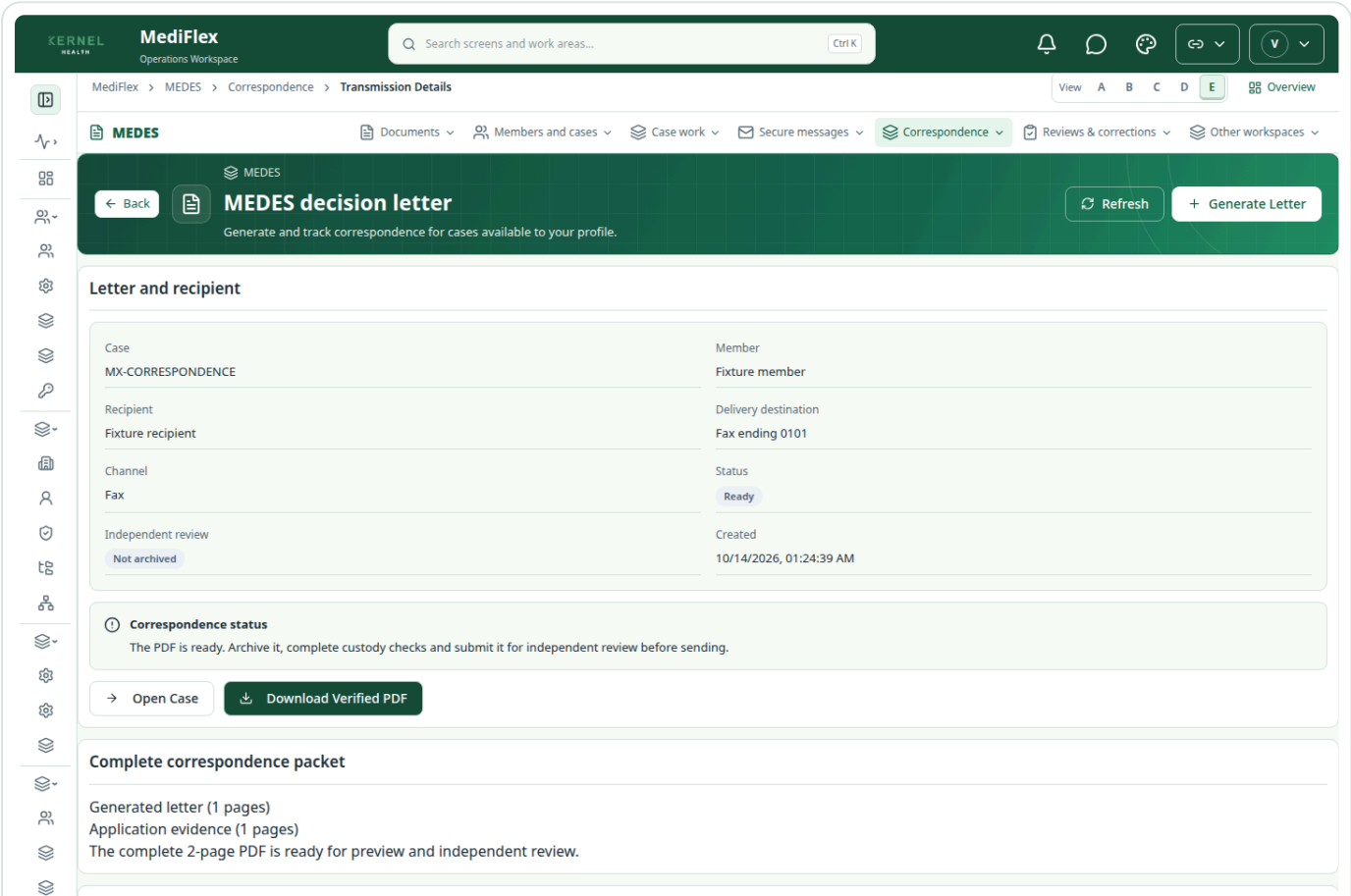
Eligibility task with outcome, effective date, evidence checklist and decision reason. The implementation requires the applicable form checks before confirmation.

Illustrative application screen · select to enlarge.

Generate and review case correspondence

Use	Instruction
Screen / task	MEDES → Correspondence → Published correspondence templates for the published MEDES generation choices.
Record to retain	Published template, output/hash, recipient/channel and decision
Check before leaving this module	Pulse template approval and generated case-item review are separate decisions.

[Open the complete MEDES procedure](#) · [Open its step-by-step routes](#)



SCREEN 17

Generated correspondence packet. PDF Ready and Not archived show why delivery is not yet permitted.

Illustrative application screen · select to enlarge.

Release only eligible configured delivery

Use	Instruction
Screen / task	the approved letter and verify its current recipient, destination, complete PDF and review outcome.
Record to retain	Attempt, provider and custody references
Check before leaving this module	Parked fax/print-mail activation remains blocked; do not turn a local capture into external-delivery evidence.

[Open the complete MEDES procedure](#) · [Open its step-by-step routes](#)

Record response and follow-up

Use	Instruction
Screen / task	the original correspondence and choose Reply to correspondence, or open Reply – On-demand Correspondence and select the original item.
Record to retain	Linked response and closure/reopen evidence
Check before leaving this module	A sent item alone does not establish customer response. Use authorized Vista summaries to trace owner records.

[Open the complete MEDES procedure](#) · [Open its step-by-step routes](#)

Owner	Record / version	Observed result	Next owner accepted / blocker
Regulix / MEDES			

Reconcile a mismatch at the first failing owner. Preserve the previous receipt before retrying. Use the module example cases to record actual outcomes and assign unresolved items.

[Open the full platform component crosswalk](#)

CHAPTER 6

Current governance and documentation handoffs

Owner	Handoff / expected evidence
IAM → Axis	Approved menu/page/control permissions and selected role/profile; screen publication does not create grants.
Axis → business screen	Approved screen title/help and owning control labels/formats; pending proposals leave current presentation effective.
IAM → domain/profile assignment	A new domain starts empty; explicit reviewed domain-profile mapping precedes the user assignment.
Pulse → originating record	Recipient-checked notification opens the current record/outcome; read state is separate from the business decision.
Administrator → audit	Named same-person exception is recorded, scoped and effective only for the selected authorized administrator profile.
MEDES → release owner	Technical installation requires activation; role grants, APIs, workflow and provider dependencies are separate entry gates.
Documentation → UAT	The manual explains operation; the demo supplies the presentation sequence; the UAT pack holds executable cases and actual evidence. Documentation browser checks do not certify application business journeys.