

Pulse — Step-by-step Walkthrough

Use one governed dataset to publish an email and a paginated letter, bind related rows, inspect generated output, then trace delivery and Scheduler execution separately.

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

Contents

1. Demonstration story, prepared data and participants
2. Demonstration sequence and visible outcomes
3. Demonstration · Select sources and datasets before naming the template
4. Demonstration · Author a responsive email with reusable and repeated content
5. Demonstration · Author and paginate a letter with stable repeated sections
6. Demonstration · Review, publish and generate the exact template version
7. Demonstration · Trace output, dispatch, notifications and Custodia handoff
8. Demonstration · Schedule email and letter generation with explicit ownership
9. Additional demonstration · Access, prerequisites and example values
10. Additional demonstration · Prepare the source and reviewed datasets
11. Additional demonstration · Step 1 · Create and test the source connection
12. Additional demonstration · Step 2 · Review and publish the connection
13. Additional demonstration · Step 3 · Define the business source
14. Additional demonstration · Step 4 · Build the primary dataset
15. Additional demonstration · Step 5 · Optional: joins, transformations and calculated fields
16. Additional demonstration · Create and publish an email template
17. Additional demonstration · Step 1 · Choose sources, datasets and artifact details
18. Additional demonstration · Step 2 · Bind a primary record and related datasets
19. Additional demonstration · Step 3 · Create and edit an email template
20. Additional demonstration · Step 4 · Preview, review, publish and generate email output
21. Additional demonstration · Create and publish a letter template
22. Additional demonstration · Step 1 · Choose sources, datasets and artifact details
23. Additional demonstration · Step 2 · Bind a primary record and related datasets
24. Additional demonstration · Step 3 · Create and paginate a letter template
25. Additional demonstration · Step 4 · Review, publish and generate letter output
26. Additional demonstration · Operate delivery and notifications
27. Additional demonstration · Step 1 · Configure a channel and notification rule

- 28. Additional demonstration · Step 2 · Generation, delivery and evidence
- 29. Additional demonstration · Step 3 · Act on a notification or email link
- 30. Additional demonstration · Step 4 · Send generated output to Custodia
- 31. Additional demonstration · Schedule published Pulse output
- 32. Additional demonstration · Step 1 · Published artifact and Scheduler operation bindings
- 33. Additional demonstration · Step 2 · Define and publish an email or letter generation job
- 34. Additional demonstration · Step 3 · Bind current dataset values to job inputs
- 35. Additional demonstration · Step 4 · Execute a job and inspect its result
- 36. Additional demonstration · Step 5 · Create a one-time or recurring schedule
- 37. Additional demonstration · Step 6 · Rerun, cancel, pause, resume and retire
- 38. Additional demonstration · Step 7 · Inspect and verify execution audit evidence
- 39. Additional demonstration · Demonstration · Notification and email outcome
- 40. Cross-module handoffs and the record references to retain
- 41. Problem → responsible action → safe continuation
- 42. Close the demonstration and hand over the operating guide

Demonstration story, prepared data and participants

Use one governed dataset to publish an email and a paginated letter, bind related rows, inspect generated output, then trace delivery and Scheduler execution separately.

Worked example and preparation

Use a prepared training source containing CASE1001 (OPEN, amount 1200), CASE1002 (CLOSED, amount 500) and CASE1003 (OPEN, amount 300). Expected count is 3, total amount 2000, and OPEN amount 1500. These are illustrative input values, not seeded application records. A second related-items source can contain two rows for CASE1001; keep parent and detail totals separate. Use CASE1001 as the primary merge record. Use controlled recipients only when external dispatch is explicitly part of the rehearsal.

Worked record values and expected totals

record_id	status	amount
CASE1001	OPEN	1200
CASE1002	CLOSED	500
CASE1003	OPEN	300

Expected case count is 3 and total amount is 2000. The OPEN group has 2 cases and amount 1500; CLOSED has 1 case and amount 500. Use CASE1001 for a primary-record email/letter. A related-items dataset with two rows for that case should repeat two detail rows, without treating the repeated parent amount as two separate cases. The values must be prepared through the approved source owner before the live exercise.

Responsibilities

Role	Responsibility
Template author	Creates email, letter or message content with saved bindings.
Endorser / approver / publisher	Completes the configured independent governance stages.
Output operator	Generates and inspects output for an authorized primary record.
Delivery / Scheduler operator	Manages configured dispatch or governed scheduled generation.

Terms used in this module

Term	Meaning
Template	A versioned reusable content definition.
Primary record key	The exact dataset row used for parent fields.

Term	Meaning
Related collection	Additional rows filtered by the saved parent-child binding.
Generated output	An email/message file or letter PDF.
Delivery attempt	A separate dispatch outcome; generation does not prove delivery.

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.

CHAPTER 2

Demonstration sequence and visible outcomes

Business journey	Open the detailed steps
Saved data binding to email and letter composition	<u>Select sources and datasets before naming the template</u> <u>Author a responsive email with reusable and repeated content</u> <u>Author and paginate a letter with stable repeated sections</u>
Reviewed publication and accountable output	<u>Review, publish and generate the exact template version</u> <u>Trace output, dispatch, notifications and Custodia handoff</u>
Scheduled published content	<u>Schedule email and letter generation with explicit ownership</u>

CHAPTER 3

Demonstration · Select sources and datasets before naming the template

Open	Who acts
Pulse → New email/letter → source/dataset selection → artifact details	Template author

Establish a reusable data binding before authoring. Source credentials and dataset modeling remain with the data owner.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Selected source(s)	The approved Training Cases contract	Choose sources first, or follow Vista to register/review them.
Dataset	The eligible selected-source dataset	A dataset from another source should not be treated as interchangeable.

Input shown on screen	Enter or select	Explain its significance
Template name/details/channel	Training Case Update for EMAIL; Training Case Letter for LETTER	Channel controls available authoring/output actions.
Primary key binding	record_id in the training dataset	CASE1001 later resolves one current authorized record.
Related dataset / key mapping	main.record_id to items.case_id	A saved mapping establishes repeated-record scope.

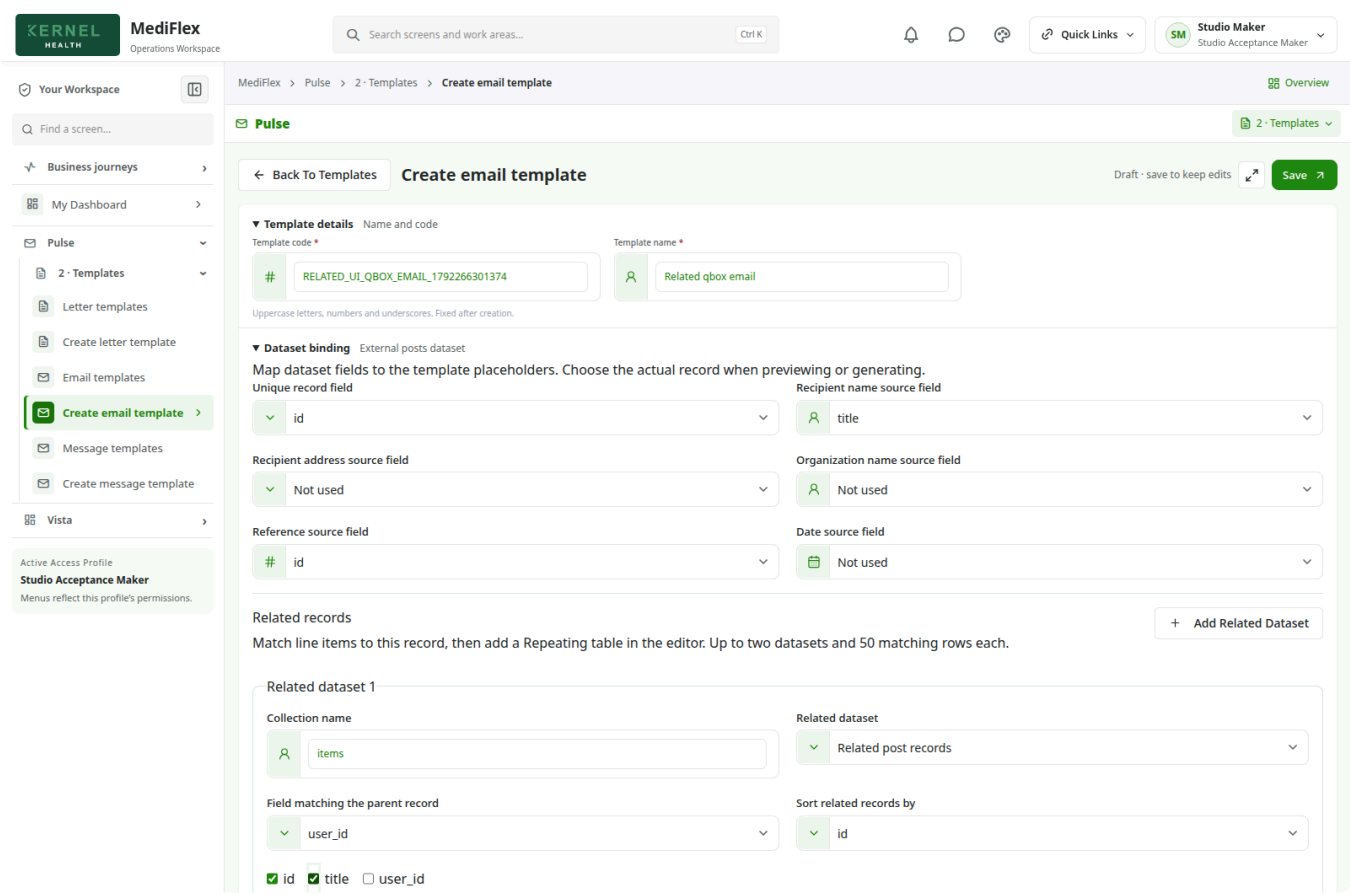
Perform and explain

Step	Demonstrator action	Point out on the screen
1	Pick the approved source(s) and eligible dataset(s).	The data context is explicit before Studio opens.
2	Enter the template name, channel and basic details.	The artifact identity matches the intended output type.
3	Save the primary dataset and primary record-key binding.	Preview/generation can select the intended parent record.
4	Add the related-items dataset and parent/child key mapping when required.	Repeated content has a bounded relationship.
5	Reopen the saved binding and preview CASE1001.	Parent and related rows correspond to the same record.

SCREEN 7

Pulse saves the primary and related-record bindings

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



- The screenshot's test fields differ from the Service review example.
- Related rows match the selected parent key and appear in the saved rendered preview.

Evidence to show before continuing

Show source, dataset, artifact details, primary key and saved related mapping.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The source or field is missing	Resolve source publication/discovery or access in Vista rather than hardcoding a merge value.
Related rows are empty	Check key types, exact key value and relationship mapping; a missing collection can be a legitimate zero-child case.

Next part of the demonstration

Author the email or letter using the saved primary and related bindings.

CHAPTER 4

Demonstration · Author a responsive email with reusable and repeated content

Open	Who acts
Pulse → Email templates → selected draft → Email Studio	Email author

Separate subject, body composition and data binding so the same published template can generate content for different permitted records.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Subject	Case update for the selected bound record	Use the offered binding controls rather than a hardcoded record name.
Body blocks / reusable section	Greeting, case summary, repeated items and next action	Reuse approved content where offered; inspect the final assembled order.
Primary fields	Case name/status/amount from the saved dataset	The field key and data type must match the current model.
Repeating collection	The saved related-items binding	Use a zero-row fallback and inspect several rows.
Preview record / width	CASE1001 and desktop/narrow widths	Preview the saved template with current authorized data.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Open the saved email draft with its dataset binding.	The body and subject share the intended record context.
2	Add a clear greeting, case fields and a business next action.	The message explains its purpose without technical configuration language.
3	Insert a related-record section and reusable content where appropriate.	Each related row renders once in the intended location.
4	Save Draft and preview CASE1001.	Subject and body resolve from the saved version.

Step	Demonstrator action	Point out on the screen
5	Inspect a narrow view, long text and a record with no related rows.	The email remains readable without unintended overflow or empty structural gaps.
6	Correct the draft and save/preview the resulting revision again.	Review will apply to the actual revised content.

SCREEN 8

Email Studio: saved dataset binding, subject and preview controls

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

MediFlex > Pulse > 2 · Templates > Create email template

Overview

2 · Templates

Back To Templates Create email template Draft · save to keep edits Save

▼ Template details Name and code

Template code * Template name *

CREATION_FLOW_TEMPLATE Current data template

Uppercase letters, numbers and underscores. Fixed after creation.

▼ Dataset binding Studio acceptance dataset

Map dataset fields to the template placeholders. These mappings are saved with the template. Choose the actual record when previewing or generating.

Unique record field Recipient name source field

code name

Recipient address source field Organization name source field

Not used Not used

Reference source field Date source field

Not used Not used

Design Canvas Email Template Start blank or choose... Design Preview Mobile Preview 100%

Prepare this email 0/4 ready +

2 checks before publishing

Email Subject Inbox Preview Text

T Enter value T Give them a reason to open it...

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

Evidence to show before continuing

Show resolved subject/body, multiple related rows and the empty-collection layout.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A field token remains visible	Inspect the saved key and current record binding.
The related section repeats unrelated rows	Correct the parent-child key mapping before review or generation.

Next part of the demonstration

Submit for configured endorsement/approval, publish and generate the controlled email file.

CHAPTER 5

Demonstration · Author and paginate a letter with stable repeated sections

Open	Who acts
Pulse → Letter templates → selected draft → Letter Studio	Letter author

Make page structure part of the template so the printed output remains usable with variable-length data.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Page settings / margins	The offered letter page format	Design for final PDF page boundaries, not only the zoomed canvas.
Header / body / footer	Title/branding, case narrative and permitted footer	Keep repeated page elements separate from record-specific body content.
Repeating collection / table	The saved related items	A many-row case must not overprint the footer.
Page breaks / reusable sections	Use the offered composition controls deliberately	A forced break should serve the document structure.
Preview record	CASE1001, plus a prepared long-data case	Both ordinary and multi-page content need inspection.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Create the letter using its saved source/dataset binding.	The document has an explicit primary record context.

Step	Demonstrator action	Point out on the screen
2	Set page geometry and place heading, body and footer.	The letter's reading order and printable area are clear.
3	Insert parent fields and the related table/section.	The document combines one parent with its authorized details.
4	Add permitted page breaks and reusable content.	The page structure can accommodate variable-length sections.
5	Save and inspect the saved PDF/output preview.	Page count, breaks, repeating content and footer placement are visible.
6	Repeat with a prepared long-data case and correct any clipping before review.	The letter remains readable across pages.

SCREEN 14

Letter Studio with repeating data and reusable sections

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

The screenshot displays the 'Create letter template' interface in the MediFlex application. The sidebar on the left contains navigation links for 'Your Workspace', 'Business journeys', 'My Dashboard', 'Pulse', '2 · Templates', 'Letter templates', 'Create letter template', 'Email templates', 'Create email template', 'Message templates', 'Create message template', and 'Vista'. The main workspace is titled 'Create letter template' and includes a search bar and a 'Quick Links' button. The 'Template details' section shows a template code 'RELATED_UI_QBOX_LETTER_1792266281226' and a template name 'Related qbox letter'. The 'Dataset binding' section shows a dataset named 'External posts dataset'. The 'Design Canvas' section shows a letter template with a table structure. The 'Prepare this letter' section shows a preview of the letter with a table structure. The 'Inspector' panel on the right shows the 'Make It Yours' section with a repeating table and related records.

- Planned page layout can grow when actual records are rendered.
- Use the saved PDF preview to verify pagination, not just the design canvas.

Evidence to show before continuing

Show normal and multi-page output, the resolved record fields and related rows.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The canvas looks right but PDF clips	Inspect page geometry, saved revision and output pagination.
The wrong record is merged	Check the primary record key and saved binding before generating again.

Next part of the demonstration

Follow template governance and inspect the generated published-version PDF.

CHAPTER 6

Demonstration · Review, publish and generate the exact template version

Open	Who acts
Pulse → selected template → governance, publish and generation actions	Author, required independent reviewers and output operator

Keep draft content, review authority, publication and generated output separate so a later edit does not silently alter published correspondence.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Template version / saved preview	The exact submitted channel-specific revision	An unsaved preview is not the reviewed publication.
Endorse / return / approve	The configured governance stages	An endorsement is not final publication.
Record key / merge input	CASE1001 and only offered inputs	The producer loads current authorized data through the saved binding.
Generated job/output	The returned email file or letter PDF reference	Output readiness and delivery readiness are different states.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Save and preview the intended template revision.	The review candidate is explicit.
2	Submit and complete the configured endorsement/independent approval stages.	Returned content is corrected and resubmitted through the supported path.
3	Publish the approved version.	The template catalog distinguishes it from the latest working draft.
4	Generate output for the exact primary record using the published template.	A durable output job/reference is returned.
5	Inspect the generated subject/body or complete letter PDF.	The file matches the selected record, channel and version.
6	For later changes, create a new version and repeat the applicable governance.	Earlier publications/output remain traceable.

SCREEN 10

Published email template in the originating master

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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

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Core

Pulse

2 · Templates

Letter templates

Create letter template

Email templates

Create email template

Message templates

Create message template

Vista

Nexora

Active Access Profile Platform Demo Maker

Menus reflect this profile's permissions.

MediFlex > Pulse > 2 · Templates > Email templates

View A B C D E Overview

Pulse

Pulse · Email Templates

Refresh New Template

Publish template: saved successfully.

Search loaded records...

Template	Version	Stage	Actions
Browser email 1792321061145	1	Published	Preview
Recover email qbox	1	Draft	Preview Submit Template For Review
Recover email classic	1	Draft	Preview Submit Template For Review
Newer saved draft	1	Draft	Preview Submit Template For Review
Related classic email	1	Draft	Preview Submit Template For Review
Related qbox email	1	Draft	Preview Submit Template For Review
Related records email	1	Published	Preview
Browser email 1792252552227	1	Published	Preview
Browser email 1792248069061	1	Published	Preview
Studio acceptance email	1	Published	Preview

Showing 1-10 of 55

Page 1 / 6

- Preview and state-eligible actions remain with the template row.
- The Published state makes this version eligible for generation and a Scheduler job.

Evidence to show before continuing

Show version, review decisions, publication and the actual generated artifact.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
Generation is pending or failed	Open the output job and producer reason before submitting another generation.
A suspended/retired template cannot be selected	Use an eligible published version or complete its supported lifecycle action.

Kernel · Demo walkthrough

13 / 65

Next part of the demonstration

Archive eligible output in Custodia or configure separate authorized delivery.

CHAPTER 7

Demonstration · Trace output, dispatch, notifications and Custodia handoff

Open	Who acts
Pulse → generated output; Delivery attempts; Operator inbox; Custodia Handoffs	Output/delivery operator and recipient

A generated message/file, an accepted dispatch and a delivered communication are different outcomes with different owner evidence.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Channel / notification rule	The reviewed configured destination/rule	An unconfigured channel cannot be described as live delivery.
Delivery attempt / producer reference	The current dispatch record	Reconcile an interrupted send before creating another attempt.
Custodia handoff	The selected generated output and intended document context	Archive admission has its own processing/custody outcome.
Notification action / read state	View outcome separately from Mark as read	Opening a notification does not approve the underlying business record.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Inspect the generated artifact before any release.	The intended record/version is confirmed.
2	Use only the offered configured delivery/capture action for the approved channel.	The attempt records its actual dispatch mode and status.
3	Inspect Delivery attempts and the producer/provider reference.	Acceptance is distinguished from confirmed delivery.
4	For Custodia, request the output handoff and follow its retained document reference.	Archiving is traced separately from generation.

Step	Demonstrator action	Point out on the screen
5	Open a recipient notification/email outcome link with the eligible profile.	The current owning record/outcome opens, even if an older message refers to completed work.
6	Use Mark as read separately and retain support correlation for a persistent failure.	Notification state is not confused with business workflow state.

Evidence to show before continuing

Show output reference, dispatch status, Custodia document and current notification destination as separate facts.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A send has an uncertain outcome	Reconcile the existing producer/provider attempt before another release.
Notification unavailable appears	Confirm the recipient/profile and current outcome; record the notification/correlation if it persists.

Next part of the demonstration

Use a governed Scheduler job for recurring published-template generation.

CHAPTER 8

Demonstration · Schedule email and letter generation with explicit ownership

Open	Who acts
Scheduler → Job Definitions → matching Pulse operation	Scheduler maker/reviewer and execution owner

Schedule the published producer operation rather than replaying Studio authoring or assuming that generation dispatches mail.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Operation / published content	Generate published Pulse email or letter, filtered by channel	The selector pins eligible artifact version/revision/hash.

Input shown on screen	Enter or select	Explain its significance
Primary record key	CASE1001	The execution owner must still be allowed to read that record.
Sender / recipient	Controlled destinations only for the offered email operation	Illustrative addresses are not proof of deliverability; letter generation does not need email fields.
Execution identity / domain	An approved current identity/context	All primary and related datasets remain subject to current access.
Preview / schedule	Current input resolution and intended time policy	Preview does not execute the producer.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Select the matching registered operation before selecting the template.	Only eligible channel-specific published content is offered.
2	Enter the record key, execution owner and operation-specific inputs.	The job has explicit authority and data scope.
3	Save and preview, then complete independent job review/publication.	The exact producer/artifact binding is governed.
4	Execute one controlled job and inspect its Pulse output reference.	A completed Scheduler run can be followed to actual generated content.
5	Create/review/publish the intended one-time or recurring schedule.	Timing policy is separate from job publication.
6	Inspect failure, retry/rerun and audit using the Scheduler handbook.	Recovery preserves producer and run lineage.

SCREEN 17

Run details, producer reference and audit verification

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

SC

Studio Checker

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Your Workspace

Find a screen...

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Core

Scheduler 3

Job Definitions

Schedules

Job Runs

Pulse

Vista

Active Access Profile

Platform Demo Checker

Menus reflect this profile's permissions.

MediFlex > Core > Job Runs

View A B C D E Overview

Back

Core

Run 1 · Boot acceptance LETTER

Choose a valid Scheduler run audit file.

Status

Job version

Requested

Completed

Producer result reference

Succeeded

1

10/18/2026, 3:24:07 PM

10/18/2026, 3:24:27 PM

pulse-render://a1a76c43-92d9-4ec5-89fd-0e8438601b6d

Refresh Run

Download Audit

Audit file

Choose File

No file chosen

The file stays in your browser. Only its receipt and calculated hash are checked with the server.

Search loaded records...

Attempt

Status

Started

Dispatched

Completed

1

ACCEPTED

10/18/2026, 03:24:12 PM

10/18/2026, 03:24:16 PM

10/18/2026, 03:24:21 PM

Showing 1-1 of 1

<< < > >> Page 1 / 1

Search loaded records...

Sequence

Event

When

Reason

1

Queued

10/18/2026, 03:24:07 PM

2

Operator requested

10/18/2026, 03:24:07 PM

Isolated actual Boot execution acceptance

3

Claimed

10/18/2026, 03:24:12 PM

4

Dispatched

10/18/2026, 03:24:16 PM

5

Waiting external

10/18/2026, 03:24:21 PM

6

Succeeded

10/18/2026, 03:24:27 PM

- A successful scheduler run must have its producer outcome explained.
- Choose an actual exported audit file; the screenshot has no file selected.

Evidence to show before continuing

Show the job's pinned template, current record preview, run and Pulse output.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The template is missing	Check published channel, active availability and execution-owner access.
Scheduler succeeds but no mail arrived	Check whether the operation generated a file or dispatched it; inspect separate delivery evidence.

Kernel · Demo walkthrough

17 / 65

Next part of the demonstration

Follow Scheduler queues, overlap, backfill, batches and reconciliation procedures as required.

CHAPTER 9

Additional demonstration · Access, prerequisites and example values

Use a published authorized dataset with a stable key and a controlled fictional record such as CASE1001. Prepare related rows if the template uses repeats. Select a maker and independent checker. For output-only demonstrations use clearly fictional addresses; for actual sending use an authorized controlled recipient and configured live transport.

Input / choice	Example or selection	Meaning / check
Template code/name/channel	DEMO_SERVICE_EMAIL or DEMO_SERVICE_LETTER	Select the channel before building content; email and letter outputs have different page/layout constraints.
Primary dataset / key	Reviewed service dataset; unique record_id	The binding is saved with the template. A duplicate or missing key should be investigated rather than selecting an arbitrary row.
Related dataset binding	Eligible child data joined to the selected primary record	Inspect multiple, zero and missing child rows; do not hard-code one child as representative of all records.
Email sender / recipient	Controlled values or permitted dataset-bound fields	A generated file containing addresses is not proof that a mail service accepted it.
Letter page settings	Supported paper, margins, orientation and page breaks	Check final output at actual page boundaries and with repeated rows; the editing canvas alone is insufficient.
Reusable content / conditions	Supported blocks, conditions and saved references	Check both visible and hidden branches with authorized sample records before review.

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

Data used in the procedures

The example is a service-review pack: a manager views work by region, receives an email summary for one case, and generates a formal letter for the same case. These are proposed walkthrough values, not records created in your Azure tenant.

Object	Example code / name
Connection	DEMO_SERVICE_API / Demo service records API
Source definition	DEMO_SERVICE_SOURCE / Service records
Primary dataset	DEMO_SERVICE_DATA / Service review dataset
Related-record dataset	DEMO_SERVICE_ITEMS / Service line items
Report	DEMO_SERVICE_REPORT / Service operations report
Dashboard	DEMO_SERVICE_DASH / Service operations dashboard
Email template	DEMO_SERVICE_EMAIL / Service review email
Letter template	DEMO_SERVICE_LETTER / Service review letter
Jobs	DEMO_REFRESH_JOB, DEMO_REPORT_JOB, DEMO_DASH_JOB, DEMO_EMAIL_JOB, DEMO_LETTER_JOB

record_id	recipient_name	region	status	amount
CASE1001	Alex Demo	North	OPEN	1200
CASE1002	Morgan Demo	South	COMPLETE	800
CASE1003	Taylor Demo	North	OPEN	500
CASE1004	Casey Demo	West	REVIEW	1500

Also expose recipient_address, organisation_name, reference, correspondence_date and recipient_email. Keep amount numeric and correspondence_date in a supported date representation. The related item source has item_id, case_id, description and line_amount; case_id matches record_id.

The pack includes **DEMO_SERVICE_RECORDS.json** and **DEMO_SERVICE_ITEMS.json** as synthetic payload examples. They are not an import facility or a running API. Have the operator's approved demo API serve them, or select an existing published business source with equivalent fields. The primary example totals four records and amount 4000 only when all four rows are in the authorized result; a limited preview or narrower profile may show less.

CHAPTER 10

Additional demonstration · Prepare the source and reviewed datasets

Use this route when you need to prepare the source and reviewed datasets.

1. Create and test the source connection
2. Review and publish the connection

3. Define the business source
4. Build the primary dataset
5. Optional: joins, transformations and calculated fields

CHAPTER 11

Additional demonstration · Step 1 · Create and test the source connection

Before you act	Required context
Screen / entry	Vista → Sources & datasets → Available Datasets → Connections → New connection
Who acts	Maker
You need	Use a published authorized dataset with a stable key and a controlled fictional record such as CASE1001. Prepare related rows if the template uses repeats. Select a maker and independent checker. For output-only demonstrations use clearly fictional addresses; for actual sending use an authorized controlled recipient and configured live transport.

Steps and field guidance

Who: Maker

Open: Vista → Sources & datasets → Available Datasets → Connections → New connection

1. Enter Connection name and Connection code. Choose the approved HTTPS endpoint that returns your synthetic records as JSON. Do not copy an old screenshot endpoint as an environment configuration.
2. Choose authentication: Public API, Bearer token reference, API key header reference, or Username and password reference. Enter only the configured private credential reference; for an API key, also specify the header name.
3. Set JSON row path to the array location, for example data.records. Leave it blank for a root JSON array.
4. Set Maximum response rows and Timeout in seconds. For this small demo, 100 rows and 15 seconds are sufficient when allowed.
5. For synthetic public reference data choose the corresponding Row scope. For tenant-specific business data choose tenant matching and the actual Tenant ID field. Do not use public scope to bypass tenant filtering.
6. Expand Data access policy when your administrator has supplied the registered resource/permission requirements.
7. Select Save connection draft. On its grid row select Test & discover. If queued, use Check test result until it reaches a usable READY result. Inspect discovered fields, types, row count and the latest snapshot.

SCREEN 1

Connection definition and authentication references

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

- The external endpoint and credential reference belong to the connection.
- The screenshot uses an earlier test API; use your approved demo endpoint.

Expected result

The connection draft has a successful field-discovery result for its current revision. Failure, timeout or an empty field contract is shown explicitly.

This self-service flow is an approved-host HTTPS JSON connector. The inspected UI supports a maximum of 500 response rows and 2 MB, with 1–30 second timeouts. It uses an explicit source snapshot. It is not an arbitrary SQL connection browser or a promise of unlimited provider/pagination support.

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

Additional demonstration · Step 2 · Review and publish the connection

Before you act	Required context
Screen / entry	Connections → the same record row
Who acts	Maker → independent Checker → authorized Publisher
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker → independent Checker → authorized Publisher

Open: Connections → the same record row

1. Maker completes Test & discover for the saved revision, then selects Submit for review. Provide a meaningful reason.
2. Checker opens the same connection, inspects endpoint, authentication reference, tenant scope and selected fields, then runs its own Test & discover.
3. After its current successful test, Checker chooses Approve or Return on the row. Returned changes go back to the author for correction and another test/review.
4. The authorized publisher selects Publish after approval. Refresh the source setup screen.
5. For a published connection, verify Refresh snapshot and inspect the result. This refresh changes the source data snapshot; it does not silently edit approved source field definitions.

Expected result

The connection becomes published and eligible for source-definition selection. A fresh successful test is required for the revision being submitted/reviewed.

Connection test eligibility is time-limited (30 minutes in the inspected implementation). A changed revision, expired test or changed authorization requires a new test. Publication of a connection does not create a dataset or report.

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

Additional demonstration · Step 3 · Define the business source

Before you act	Required context
Screen / entry	Vista → Sources & datasets → Source definitions → New source
Who acts	Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker

Open: Vista → Sources & datasets → Source definitions → New source

1. Enter Source name: Service records and Source code: DEMO_SERVICE_SOURCE, with your unique suffix.
2. Select the approved published connection from the connection selector.
3. Select the discovered fields needed by the demo, including record_id and the numeric amount. Include the contact fields only when the intended readers are authorized to use them.
4. Save source draft. Preview the saved source and inspect its current rows and field contract.
5. Submit for review. The independent Checker opens the same source row, performs its own preview, checks field exposure and approves or returns.
6. Publish the approved source. Refresh Datasets or the Studio source-selection step.
7. Repeat for the optional Service line items source using its corresponding approved connection/registered source.

SCREEN 2

Source Definitions is the named-source master

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

The screenshot shows the MediFlex Operations Workspace interface. The top navigation bar includes the Kernel Health logo, the MediFlex Operations Workspace title, a search bar, and a 'Studio Maker Platform Demo Maker' button. The left sidebar contains a 'Your Workspace' section with links to 'Business journeys', 'My Dashboard', 'Pulse', 'Vista', and 'Nexora'. The 'Vista' section is expanded, showing '1 · Sources & datasets' and 'Available Datasets'. The main content area is titled 'Source Definitions' and includes a 'Refresh' button and a 'New Source' button. Below this is a table with columns: Source Name, Code, Connection / Provider, Version, Status, and Action. The table lists three sources: 'Report Catalogue', 'External test records', and 'Model albums source'. Each source has a 'Preview' button and a 'Create Dataset' button. The table footer shows 'Showing 1-3 of 3' and 'Page 1 / 1'.

Source Name	Code	Connection / Provider	Version	Status	Action
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

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

Expected result

Service records appears as a published source. Its name and field contract are available to dataset builders with the correct scope.

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

CHAPTER 14

Additional demonstration · Step 4 · Build the primary dataset

Before you act	Required context
Screen / entry	Vista → Sources & datasets → Datasets → New dataset
Who acts	Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker

Open: Vista → Sources & datasets → Datasets → New dataset

1. Enter Dataset name: Service review dataset and Dataset code: DEMO_SERVICE_DATA.
2. Choose Select fields from one source and select Service records.
3. Select record_id, recipient_name, recipient_address, organisation_name, reference, correspondence_date, recipient_email, region, status and amount. Check the actual types, especially numeric amount.
4. Save dataset draft. Open Preview from the saved row. Verify CASE1001 and its authorized values; an empty result must be understood rather than filled with invented records.
5. Return to the dataset row and choose Submit for review.
6. Checker uses its own profile and Preview on the same saved revision, inspects fields/data/scope, then Approve or Return.
7. Publish the approved dataset. It is now eligible for the report/Pulse Studio setup. Prepare and publish Service line items similarly if using repeated content.

Expected result

A published dataset with a stable field contract is selectable in Studio. Merely saving a draft does not expose it for general report building.

Dataset preview shows up to 50 current authorized rows. Its review eligibility belongs to the saved revision and selected profile and lasts 15 minutes in the inspected implementation. Changing the draft or profile, or waiting past expiry, requires another preview. The independent Checker must obtain its own preview.

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

Additional demonstration · Step 5 · Optional: joins, transformations and calculated fields

Before you act	Required context
Screen / entry	New dataset → Dataset structure → Model sources, joins and calculations
Who acts	Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker

Open: New dataset → Dataset structure → Model sources, joins and calculations

1. Choose the primary source with alias main. Add a second source with alias lookup or items, and select the required input fields.
2. Join compatible keys. For the example, main.record_id joins items.case_id. Use LEFT to retain a primary record without items, or INNER to keep matches only.
3. Add selected fields as outputs. Give outputs distinct lowercase names. Add a calculated field, such as line_amount × a numeric constant, using the expression controls.
4. Add a filter only when it expresses the intended business subset, such as status equals OPEN. Explain how it changes the totals.
5. Preview the model. Inspect duplicate keys and row multiplication before interpreting counts or sums. Do not sum parent amount after a one-to-many join without accounting for repeated parent rows.
6. Save, preview, independently review and publish the modelled dataset exactly as for the simple dataset.

SCREEN 3

Dataset model: selected sources and fields

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 Studio Acceptance Maker

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 dataset** Save Dataset Draft

Choose a published source and the fields this dataset will expose. Save a draft, preview the data, then submit it for one independent review.

Dataset name **Dataset code**

Browser model qbox 1792258265476 # BROWSER_MODEL_QBOX_179225826561

Dataset structure

Model sources, joins and calculations

Dataset model

Select inputs, connect their keys, then define the fields your Studio will use. Each source and field is checked against the current profile.

1 · Sources + Add Source

main

Source main

External test records · NX_7fc6ad11372044098b31152237ecb8e0 · v1

☒ id NUMBER ☐ body TEXT ☒ title TEXT ☒ user_id NUMBER

lookup Remove Lookup

Source lookup

Model albums source · NX_9d5bed372e2c4202b854836e5d7fd3e · v1

- The model uses compatible registered field types and source versions.
- Each additional source needs a join; all outputs are explicit.

SCREEN 4

Checker previews the saved dataset model

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

▼

SC

Studio Checker

Studio Acceptance Checker

▼

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

Active Access Profile

Studio Acceptance Checker

Menus reflect this profile's permissions.

MediFlex

Vista

1 · Sources & datasets

Available Datasets

View

A

B

C

D

E

Overview

← Back

Vista

Browser model qbox 1792258265476 · Preview

Up to 50 current authorized rows. An empty dataset is shown explicitly and can still be reviewed.

Previewed 10/17/2026, 11:01:30 PM · valid for this revision and selected profile for 15 minutes.

id	title	user_id	lookup_id	lookup_title
1	sunt aut facere repellat provident occaecati excepturi optio reprehenderit	1	1	quidem molestiae enim
2	qui est esse	1	1	quidem molestiae enim
3	ea molestias quasi exercitationem repellat qui ipsa sit aut	1	1	quidem molestiae enim
4	eum et est occaecati	1	1	quidem molestiae enim
5	nesciunt quas odio	1	1	quidem molestiae enim
6	dolorem eum magni eos aperiam quia	1	1	quidem molestiae enim
7	magnam facilis autem	1	1	quidem molestiae enim
8	dolorem dolore est ipsam	1	1	quidem molestiae enim
9	nesciunt iure omnis dolorem tempora et accusantium	1	1	quidem molestiae enim
10	optio molestias id quia eum	1	1	quidem molestiae enim
11	et ea vero quia laudantium autem	2	2	sunt qui excepturi placeat culpa

- This earlier recorded test shows joined current data.
- Review actual values and cardinality; the screenshot is not the Service review example.

Model feature	Inspected support
Sources / joins	1–3 sources; INNER and LEFT joins; compatible key types
Outputs / filters	1–40 named outputs; up to 12 boolean filters
Numeric expressions	Add, subtract, multiply, divide, round
Text/date expressions	Uppercase, lowercase, trim, concatenate, year from a date
Conditions / nulls	Comparisons, contains, AND/OR/NOT, is-empty, fallback when empty
Runtime behavior	Null join keys do not match; division by zero produces empty output; current access still applies

For the simple user walkthrough, keep the primary dataset one row per case. Use Pulse’s related-record collections for line items. A modelled dataset is the supported way to supply a report’s one primary dataset from several sources.

Check before continuing: The saved dataset model has the intended selected fields, types, joins and calculated values. Its current preview and independent decision apply to that exact revision.

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

CHAPTER 16

Additional demonstration · Create and publish an email template

Use this route when you need to create and publish an email template.

Before starting, use an eligible published dataset and the selected source context from the preparation route. Reuse existing reviewed dependencies when they meet the task; do not create duplicates.

1. Choose sources, datasets and artifact details
2. Bind a primary record and related datasets
3. Create and edit an email template
4. Preview, review, publish and generate email output

CHAPTER 17

Additional demonstration · Step 1 · Choose sources, datasets and artifact details

Before you act	Required context
Screen / entry	New report, New dashboard, Create email template or Create letter template
Who acts	Maker
You need	Use a published authorized dataset with a stable key and a controlled fictional record such as CASE1001. Prepare related rows if the template uses repeats. Select a maker and independent checker. For output-only demonstrations use clearly fictional addresses; for actual sending use an authorized controlled recipient and configured live transport.

Steps and field guidance

Who: Maker

Open: New report, New dashboard, Create email template or Create letter template

1. **Sources:** Define or choose sources. Select the published source(s) used by your dataset. Define source opens the source master when authorized.
2. **Datasets:** Build or choose datasets that match those selected sources. Build dataset opens the dataset master. Newly created items become selectable after review and publication.
3. **Basic details:** Type the artifact's name and code. Verify the chosen source/dataset summary.
4. **Studio:** Select Open Studio. Start from a blank canvas, then optionally choose a template/layout from the toolbar.

SCREEN 5

First select the sources

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

The screenshot displays the MediFlex Report Studio interface. The top navigation bar includes the Kernel Health logo, the user name 'MediFlex', a search bar, and various utility icons. The left sidebar shows a 'Your Workspace' section with a search bar and a list of items: Business journeys, My Dashboard, Pulse, Vista, Report Catalog, and Report Studio (which is highlighted). Below this is an 'Active Access Profile' section for 'Studio Acceptance Maker'. The main content area shows the 'Vista' breadcrumb and a progress bar with four steps: 1. Sources & datasets, 2. Reports & visuals (current step), 3. Dashboard catalog, and 4. Runs & results. The 'Untitled Report' page has a subtitle 'Choose a dataset, design your report, then preview it for review.' and buttons for '+ New Report' and 'Save Draft'. A dropdown menu 'Open an existing report...' is visible. The 'Sources' step is active, showing a 'Define or choose sources' section with a 'Refresh' button and a 'Define Source' button. Below this is a search bar 'Find a source' with a search icon and the text 'Search by name or code'. A list of sources is shown, including 'Report Catalogue' with 'VISTA_CATALOGUE' and '3 fields'. A note states 'New sources and datasets become selectable after independent review and publication.' At the bottom are 'Cancel' and 'Continue' buttons.

- Selection reflects current profile access.
- The same setup pattern is used by Vista and Pulse.

SCREEN 6

Then name the artifact before opening Studio

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

The screenshot shows the MediFlex Operations Workspace interface. The top navigation bar includes the Kernel Health logo, the user name 'MediFlex', a search bar, and various utility icons. The left sidebar contains a 'Your Workspace' section with a search bar and a list of navigation items: Business journeys, My Dashboard, Pulse, Vista, Report Catalog, Report Studio (highlighted), 3 · Dashboard catalog, and 4 · Runs & results. The main content area is titled 'MediFlex > Vista > 2 · Reports & visuals > Report Studio'. It features a breadcrumb trail and a status bar with four steps: 1 · Sources & datasets, 2 · Reports & visuals (active), 3 · Dashboard catalog, and 4 · Runs & results. The central panel is titled 'Vista VISTA / REPORT STUDIO' and shows an 'Untitled Report' form. The form has a 'Back' button and a '+ New Report' button. Below the title, it says 'Choose a dataset, design your report, then preview it for review.' There is a dropdown menu 'Open an existing report...' and a progress indicator with four steps: 1 Sources, 2 Datasets, 3 Basic details (active), and 4 Studio. The 'Basic details' section includes a 'Name your report' field with the placeholder 'Enter the basic details, then open a blank Studio canvas.' Below this are two columns: 'Sources' with 'Report Catalogue' and 'Datasets' with 'Studio acceptance dataset'. There are also fields for 'Report name' (containing 'Current data report') and 'Report code' (containing 'CREATION_FLOW_REPORT'). At the bottom, there are 'Cancel', 'Back', and 'Open Studio' buttons.

- Basic details retain the source/dataset selection.
- Open Studio begins composition; it does not publish anything.

A report and Pulse template use one primary dataset. A modelled dataset can combine sources. Dashboard setup can select multiple datasets, but its tiles come from published report visuals. Selecting a source alone does not supply a report layout.

Check before continuing: The artifact has the intended source(s), eligible dataset(s), name and basic details before Studio opens. The selected context is carried into the saved draft.

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

CHAPTER 18

Additional demonstration · Step 2 · Bind a primary record and related datasets

Before you act	Required context
Screen / entry	Pulse email or letter creation → shared source/dataset setup → Dataset binding
Who acts	Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker

Open: Pulse email or letter creation → shared source/dataset setup → Dataset binding

1. Choose Service review dataset as the primary published dataset. In Dataset binding select record_id as Unique record field.
2. Map Recipient name → recipient_name, Recipient address → recipient_address, Organization name → organisation_name, Reference → reference, Date → correspondence_date. Map only fields used in the content.
3. For related line items choose Add related dataset. Use collection name items, select Service line items, and match its case_id to the parent record key.
4. Select item_id, description and line_amount as related fields; choose item_id for ordering.
5. Insert a Repeating table block and select items. Give the displayed columns readable headings.
6. Choose the actual CASE1001 record later in the saved preview or generation request. The template stores the dataset and mapping, not a permanently frozen copy of that record's values.

SCREEN 7

Pulse saves the primary and related-record bindings

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 Studio Acceptance Maker

Your Workspace

Find a screen...

Business journeys

My Dashboard

Pulse

2 - Templates

Letter templates

Create letter template

Email templates

Create email template

Message templates

Create message template

Vista

Active Access Profile Studio Acceptance Maker Menus reflect this profile's permissions.

MediFlex > Pulse > 2 - Templates > Create email template

Overview

Pulse

2 - Templates

Back To Templates Create email template

Draft · save to keep edits Save

▼ Template details Name and code

Template code * Template name *

RELATED_UL_QBOX_EMAIL_1792266301374 Related qbox email

Uppercase letters, numbers and underscores. Fixed after creation.

▼ Dataset binding External posts dataset

Map dataset fields to the template placeholders. Choose the actual record when previewing or generating.

Unique record field Recipient name source field

id title

Recipient address source field Organization name source field

Not used Not used

Reference source field Date source field

id Not used

Related records

Match line items to this record, then add a Repeating table in the editor. Up to two datasets and 50 matching rows each.

+ Add Related Dataset

Related dataset 1

Collection name Related dataset

items Related post records

Field matching the parent record Sort related records by

user_id id

☒ id ☒ title ☐ user_id

- The screenshot's test fields differ from the Service review example.
- Related rows match the selected parent key and appear in the saved rendered preview.

Expected result

Both template channels use the same published dataset contract, a unique parent record key and an explicit set of merge-field mappings.

The inspected related-content implementation permits up to two related datasets, 50 matching rows each and up to eight selected fields per collection. Every dataset remains subject to current access. An ambiguous/non-unique parent key is a data problem, not a reason to pick an arbitrary record.

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

CHAPTER 19

Additional demonstration · Step 3 · Create and edit an email template

Before you act	Required context
Screen / entry	Pulse → Templates → Email templates → New template
Who acts	Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker

Open: Pulse → Templates → Email templates → New template

1. Complete source/dataset selection and enter Service review email / DEMO_SERVICE_EMAIL. Open the blank Studio and configure the binding from the previous chapter.
2. Set Email Subject to Service review update and Inbox Preview Text to Your current service summary and next steps. Insert offered merge fields only where supported.
3. Add a heading, greeting using Recipient name, a paragraph containing Reference and Date, and a clear next-step message.
4. Add the items Repeating table. Optionally use a two-column content block for Summary and Next steps.
5. Use the inspector for alignment, spacing, colors and supported conditional content. Select placeholders from the offered field list; do not type unsupported variables.
6. Use Design/Preview and Mobile Preview to inspect the email at desktop and narrow widths. Check button/link text and a valid intended destination if adding a link.
7. Save the draft. The channel is email; it is separate from a letter template even when the text is similar.

SCREEN 8

Email Studio: saved dataset binding, subject and preview controls

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

The screenshot displays the 'Create email template' interface within the MediFlex Operations Workspace. The interface is organized into a sidebar on the left and a main content area on the right. The sidebar contains navigation links for 'Your Workspace', 'Business journeys', 'My Dashboard', 'Pulse', '2 · Templates', 'Letter templates', 'Create letter template', 'Email templates', 'Create email template', 'Message templates', 'Create message template', and 'Vista'. The main content area is titled 'Create email template' and includes a 'Back To Templates' button. The 'Template details' section contains fields for 'Template code' (with a dropdown showing 'CREATION_FLOW_TEMPLATE') and 'Template name' (with a dropdown showing 'Current data template'). The 'Dataset binding' section maps dataset fields to template placeholders, including 'Unique record field', 'Recipient name source field', 'Recipient address source field', 'Organization name source field', 'Reference source field', and 'Date source field'. The 'Design Canvas' section features a 'Design' button and a 'Preview' button. Below the design canvas is a 'Prepare this email' section with a '2 checks before publishing' status and fields for 'Email Subject' and 'Inbox Preview Text'.

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

Earlier rendered email at a narrow width

Existing application recorded test · example records may differ from your tenant · [click to enlarge](#)

Dear sunt aut facere repellat provident occaecati excepturi optio reprehenderit,

Summary

Reference 1

Next steps

Review these current records.

Record	Title
1	sunt aut facere repellat provident occaecati excepturi optio reprehenderit
2	qui est esse
3	ea molestias quasi exercitationem repellat qui ipsa sit aut
4	eum et est occaecati
5	nesciunt quas odio
6	dolorem eum magni eos aperiam quia
7	magnam facilis autem
8	dolorem dolore est ipsam
9	nesciunt iure omnis dolorem tempora et accusantium
10	optio molestias id quia eum

- Related rows and columns must stay readable at mobile width.
- This is rendered recorded test content, not a sent-message receipt.

Expected result

A saved email draft includes subject, preheader, content blocks and its data contract. No message has been sent.

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

Additional demonstration · Step 4 · Preview, review, publish and generate email output

Before you act	Required context
Screen / entry	Email templates → saved record → Preview
Who acts	Maker → independent Checker → Publisher
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker → independent Checker → Publisher

Open: Email templates → saved record → Preview

1. Choose Preview on the saved row, or the saved-preview panel after saving in Studio. Verify the dataset and mappings loaded from that saved revision.
2. Enter Exact record value CASE1001, or use Find current rows and select it. Select Render saved preview. If queued, wait or use Check preview.
3. Inspect the rendered HTML and bound values. Tick **I reviewed this saved version with the selected data**.
4. Supply a meaningful Review note (at least 10 characters for the Studio submission) and submit the template for review.
5. Checker opens the same row under its own identity, renders its own saved preview, inspects it, acknowledges it and selects Approve. Use Return with a reason when correction is needed.
6. Publish the approved version. Confirm Published on the Email templates row.
7. Use the published template's Generate email action when offered. Enter the sender/recipient email fields and the intended record/input values. For this example use controlled values; generation alone does not send.
8. Open Generated Emails, refresh for completion and download the generated email file when authorized. Inspect both its plain-text and HTML parts.

SCREEN 10

Published email template in the originating master

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

The screenshot shows the MediFlex Operations Workspace interface. The left sidebar contains a navigation menu with items like 'Your Workspace', 'Business journeys', 'My Dashboard', 'Core', 'Pulse', '2 · Templates', 'Letter templates', 'Create letter template', 'Email templates' (highlighted), 'Create email template', 'Message templates', 'Create message template', 'Vista', and 'Nexora'. The main content area is titled 'Pulse · Email Templates' and shows a success message: 'Publish template: saved successfully.' Below this is a table of email templates.

Template	Version	Stage	Actions
Browser email 1792321061145	1	Published	Preview
Recover email qbox	1	Draft	Preview, Submit Template For Review
Recover email classic	1	Draft	Preview, Submit Template For Review
Newer saved draft	1	Draft	Preview, Submit Template For Review
Related classic email	1	Draft	Preview, Submit Template For Review
Related qbox email	1	Draft	Preview, Submit Template For Review
Related records email	1	Published	Preview
Browser email 1792252552227	1	Published	Preview
Browser email 1792248069061	1	Published	Preview
Studio acceptance email	1	Published	Preview

Showing 1-10 of 55

- Preview and state-eligible actions remain with the template row.
- The Published state makes this version eligible for generation and a Scheduler job.

Expected result

The template is published and a separate generation request produces the email file. Keep both the template version and generation reference.

Preview evidence is tied to revision, content and profile and expires. Editing, changing context or using an expired receipt requires rendering again. The creator's preview does not stand in for the Checker's independent preview.

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

Additional demonstration · Create and publish a letter template

Use this route when you need to create and publish a letter template.

Before starting, use an eligible published dataset and the selected source context from the preparation route. Reuse existing reviewed dependencies when they meet the task; do not create duplicates.

- 1. Choose sources, datasets and artifact details
- 2. Bind a primary record and related datasets
- 3. Create and paginate a letter template
- 4. Review, publish and generate letter output

Additional demonstration · Step 1 · Choose sources, datasets and artifact details

Before you act	Required context
Screen / entry	New report, New dashboard, Create email template or Create letter template
Who acts	Maker
You need	Use a published authorized dataset with a stable key and a controlled fictional record such as CASE1001. Prepare related rows if the template uses repeats. Select a maker and independent checker. For output-only demonstrations use clearly fictional addresses; for actual sending use an authorized controlled recipient and configured live transport.

Steps and field guidance

Who: Maker

Open: New report, New dashboard, Create email template or Create letter template

- 1. **Sources:** Define or choose sources. Select the published source(s) used by your dataset. Define source opens the source master when authorized.
- 2. **Datasets:** Build or choose datasets that match those selected sources. Build dataset opens the dataset master. Newly created items become selectable after review and publication.
- 3. **Basic details:** Type the artifact’s name and code. Verify the chosen source/dataset summary.

4. **Studio:** Select Open Studio. Start from a blank canvas, then optionally choose a template/layout from the toolbar.

SCREEN 11

First select the sources

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

The screenshot displays the MediFlex Operations Workspace interface. The top navigation bar includes the Kernel Health logo, the user name 'MediFlex', a search bar, and various utility icons. The left sidebar shows a 'Your Workspace' section with a search bar and a list of items: Business journeys, My Dashboard, Pulse, Vista, Report Catalog, Report Studio (highlighted), 3 · Dashboard catalog, and 4 · Runs & results. The main content area is titled 'Vista' and shows a breadcrumb trail: 'MediFlex > Vista > 2 · Reports & visuals > Report Studio'. Below this, there's a sub-breadcrumb 'Vista VISTA / REPORT STUDIO'. The main heading is 'Untitled Report' with a 'Back' button and 'New Report'/'Save Draft' buttons. A dropdown menu is open, showing 'Open an existing report...'. Below this, a progress bar has four steps: 1 Sources (active), 2 Datasets, 3 Basic details, and 4 Studio. The 'Define or choose sources' section includes a 'Refresh' button and a 'Define Source' button. A search bar labeled 'Find a source' is present. A list item 'Report Catalogue VISTA_CATALOGUE' with '3 fields' is shown. At the bottom, there are 'Cancel' and 'Continue' buttons.

- Selection reflects current profile access.
- The same setup pattern is used by Vista and Pulse.

SCREEN 12

Then name the artifact before opening Studio

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

The screenshot shows the MediFlex Operations Workspace interface. The top navigation bar includes the Kernel Health logo, the user name 'MediFlex', a search bar, and several utility icons. The left sidebar contains a 'Your Workspace' section with a search bar and a list of navigation items: Business journeys, My Dashboard, Pulse, Vista, Report Catalog, Report Studio (highlighted), 3 · Dashboard catalog, and 4 · Runs & results. The main content area is titled 'MediFlex > Vista > 2 · Reports & visuals > Report Studio'. It features a breadcrumb trail and a status bar with four steps: 1 · Sources & datasets, 2 · Reports & visuals (active), 3 · Dashboard catalog, and 4 · Runs & results. The central panel is titled 'Vista VISTA / REPORT STUDIO' and shows an 'Untitled Report' form. The form has a 'Back' button and a '+ New Report' button. Below the title, it says 'Choose a dataset, design your report, then preview it for review.' There is a dropdown menu 'Open an existing report...' and a progress indicator with four steps: 1 Sources, 2 Datasets, 3 Basic details (active), and 4 Studio. The 'Basic details' section includes a 'Name your report' field with the instruction 'Enter the basic details, then open a blank Studio canvas.' Below this are two columns: 'Sources' with 'Report Catalogue' and 'Datasets' with 'Studio acceptance dataset'. There are also fields for 'Report name' (containing 'Current data report') and 'Report code' (containing 'CREATION_FLOW_REPORT'). At the bottom, there are 'Cancel', 'Back', and 'Open Studio' buttons.

- Basic details retain the source/dataset selection.
- Open Studio begins composition; it does not publish anything.

A report and Pulse template use one primary dataset. A modelled dataset can combine sources. Dashboard setup can select multiple datasets, but its tiles come from published report visuals. Selecting a source alone does not supply a report layout.

Check before continuing: The artifact has the intended source(s), eligible dataset(s), name and basic details before Studio opens. The selected context is carried into the saved draft.

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

CHAPTER 23

Additional demonstration · Step 2 · Bind a primary record and related datasets

Before you act	Required context
Screen / entry	Pulse email or letter creation → shared source/dataset setup → Dataset binding
Who acts	Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker

Open: Pulse email or letter creation → shared source/dataset setup → Dataset binding

1. Choose Service review dataset as the primary published dataset. In Dataset binding select record_id as Unique record field.
2. Map Recipient name → recipient_name, Recipient address → recipient_address, Organization name → organisation_name, Reference → reference, Date → correspondence_date. Map only fields used in the content.
3. For related line items choose Add related dataset. Use collection name items, select Service line items, and match its case_id to the parent record key.
4. Select item_id, description and line_amount as related fields; choose item_id for ordering.
5. Insert a Repeating table block and select items. Give the displayed columns readable headings.
6. Choose the actual CASE1001 record later in the saved preview or generation request. The template stores the dataset and mapping, not a permanently frozen copy of that record's values.

SCREEN 13

Pulse saves the primary and related-record bindings

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The screenshot displays the 'Create email template' interface within the MediFlex application. The sidebar on the left contains navigation links, with 'Create email template' highlighted. The main panel is divided into several sections: 'Template details' with input fields for 'Template code' and 'Template name'; 'Dataset binding' which maps dataset fields to template placeholders; and 'Related records' which allows for adding related datasets. The 'Related dataset 1' section shows a collection named 'items' with a matching field of 'user_id' and sorted by 'id'. A 'Save' button is located in the top right corner of the main panel.

- The screenshot's test fields differ from the Service review example.
- Related rows match the selected parent key and appear in the saved rendered preview.

Expected result

Both template channels use the same published dataset contract, a unique parent record key and an explicit set of merge-field mappings.

The inspected related-content implementation permits up to two related datasets, 50 matching rows each and up to eight selected fields per collection. Every dataset remains subject to current access. An ambiguous/non-unique parent key is a data problem, not a reason to pick an arbitrary record.

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

CHAPTER 24

Additional demonstration · Step 3 · Create and paginate a letter template

Before you act	Required context
Screen / entry	Pulse → Templates → Letter templates → New template
Who acts	Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker

Open: Pulse → Templates → Letter templates → New template

1. Complete source/dataset selection and enter Service review letter / DEMO_SERVICE_LETTER. Open the blank Studio and apply the same primary/related-record binding.
2. Choose paper size (for example Letter for the US walkthrough) and suitable margins. Add organization heading, Recipient name/address, Date and Reference using the offered fields.
3. Add the body and the items Repeating table. Inspect table column widths and long descriptions.
4. Insert a Page Break before an appendix or terms section. Add enough controlled sample content/related rows to exercise more than one page.
5. Use the template/layout dropdown only if you want a starting design. Inspect all resulting blocks; selected recipes still need correct data mappings.
6. Optionally save a selected block as a reusable section and insert it into another draft. Inserted sections are independent copies; later library edits do not silently update published templates.
7. Save the draft. Render saved preview for CASE1001 and inspect the actual PDF, including every page, wrapping, margins and repeated table headings.

SCREEN 14

Letter Studio with repeating data and reusable sections

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The screenshot displays the 'Create letter template' interface in the MediFlex application. The interface is divided into several sections:

- Template details:** Includes fields for 'Template code' (RELATED_UI_QBOX_LETTER_1792266281226) and 'Template name' (Related qbox letter).
- Dataset binding:** Shows the 'External posts dataset' selected.
- Design Canvas:** Displays the 'Letter' template, 'Start blank or choose...' option, 'Paper' (A4), and 'Margins (Mm)' (20).
- Prepare this letter:** Shows a preview of the letter with a repeating table of 'items' containing 'Record' and 'Title' columns. The preview indicates 'Related rows appear in the saved preview.'
- Inspector:** Shows 'Make It Yours' settings, including 'repeat', 'Repeating table', 'Related records', and 'Column heading'.

- Planned page layout can grow when actual records are rendered.
- Use the saved PDF preview to verify pagination, not just the design canvas.

Expected result

A saved letter draft renders a readable PDF using the selected record. The page-break walkthrough shows a real additional page in the rendered file.

The inspected local renderer embeds fonts and honors page breaks and margins. Do not equate successful rendering with PDF/A certification, accessibility tagging, postal dispatch or fax delivery. Those require their own capabilities and acceptance.

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

CHAPTER 25

Additional demonstration · Step 4 · Review, publish and generate letter output

Before you act	Required context
Screen / entry	Letter templates → saved record → Preview
Who acts	Maker → independent Checker → Publisher
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Maker → independent Checker → Publisher

Open: Letter templates → saved record → Preview

1. After inspecting the saved PDF, acknowledge the saved-version preview and submit the draft for review with a meaningful note.
2. Checker renders the same saved revision with its own current data access, checks recipient/address and every page, acknowledges the preview and approves or returns.
3. Publish the approved letter. Verify the Published status and version on its row.
4. Use the published letter's Render / PDF request action when offered. Supply the intended record key for a saved data binding, or the explicitly required manual merge values.
5. Open Rendered letters. Refresh until READY or an explicit failure. Download the verified PDF when authorized and inspect the final recipient, reference, date and page count.
6. If rendering fails, correct the cause and use the supported new request/rerun process; retain the failed job history.

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- The letter is a versioned artifact; its rendered PDF is a separate output.
- Use the current row actions rather than manually composing record URLs.

A published letter and a READY PDF output exist as distinct records. Their identifiers are ready to compare with Scheduler results.

Use this route when you need to operate delivery and notifications.

Before starting, use an eligible published dataset and the selected source context from the preparation route. Reuse existing reviewed dependencies when they meet the task; do not create duplicates.

- 1. Configure a channel and notification rule
- 2. Generation, delivery and evidence
- 3. Act on a notification or email link
- 4. Send generated output to Custodia

CHAPTER 27

Additional demonstration · Step 1 · Configure a channel and notification rule

Before you act	Required context
Screen / entry	Create Channel and select the appropriate channel/provider/mode in its configuration control.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Use a published authorized dataset with a stable key and a controlled fictional record such as CASE1001. Prepare related rows if the template uses repeats. Select a maker and independent checker. For output-only demonstrations use clearly fictional addresses; for actual sending use an authorized controlled recipient and configured live transport.

Steps and field guidance

Before you start: The provider and sender/recipient policy are approved; credentials are available by reference.

- 1. Open Create Channel and select the appropriate channel/provider/mode in its configuration control.
- 2. Enter the required sender, endpoint and credential-reference fields. Save and inspect Channel Setup.
- 3. Keep draft/not-tested state visible until the connection has passed its intended delivery verification.
- 4. Open Create Notification Rule, choose the supported event/severity/channel configuration and cooldown.
- 5. Inspect Notification Rules and test with an authorized controlled event; verify the resulting inbox/delivery evidence.

The connection and event rule are recorded without claiming unverified live transport.

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

CHAPTER 28

Additional demonstration · Step 2 · Generation, delivery and evidence

Before you act	Required context
Screen / entry	Delivery attempts and inspect the local receipt and captured-output hash
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Evidence	What it proves	What it does not prove
Saved Studio preview	The saved content renders with selected authorized data	Publication, scheduled execution or sending
Published template	An approved version is eligible for use	A recipient has received anything
Generated email / READY PDF	The producer created an output	SMTP delivery, print, postal acceptance or fax completion
Capture locally / LOCAL_CAPTURED	A local receipt records the output and endpoint revision	External sending or provider delivery
Provider acceptance, when a separate integration is configured	The provider accepted that delivery request	Final delivery unless a later provider receipt explicitly confirms it

1. For a local delivery walkthrough, open a generated email and select Capture locally when eligible. Choose an existing matching-channel endpoint configured in LOCAL mode and its current revision.
2. Open Delivery attempts and inspect the local receipt and captured-output hash. Note that local capture is intentionally separate from sending.
3. If using a separately configured live transport, trace its own request, provider reference and final callback/status. Use a controlled recipient and the transport’s authorized send action.
4. If no such transport is configured, finish this part at generated output/local receipt and state that external dispatch is not part of this completed run.

The current Pulse Delivery attempts screen describes local capture receipts. The inspected Scheduler capabilities are Generate published Pulse email and Generate published Pulse letter. They do not supply a universal send-mail/print/fax operation or automatically attach a Vista report to an email. Do not promise those effects from a generation job.

Check before continuing: The latest attempt has an attributable provider state or an explicit configuration blocker; generation is not counted as delivery.

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

CHAPTER 29

Additional demonstration · Step 3 · Act on a notification or email link

Before you act	Required context
Screen / entry	the header bell and read the notification's subject, status and available action.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Before you start: Sign in with the intended recipient account and correct profile.

1. Open the header bell and read the notification's subject, status and available action.
2. Use the record-specific action/link to open the referenced item.
3. If sign-in is required, authenticate and return to the link; choose an eligible profile if prompted.
4. Inspect the business item's current state and perform only the action offered by its owner workflow.
5. Mark the notification read when appropriate. Reading it does not approve or complete the business item.

Navigation preserves recipient and record authority; expired or inaccessible work is handled by the target owner.

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

CHAPTER 30

Additional demonstration · Step 4 · Send generated output to Custodia

Before you act	Required context
Screen / entry	the ready Correspondence Request and choose Send to Custodia.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Before you start: The output is ready and an approved compatible Custodia class is available.

1. Open the ready Correspondence Request and choose Send to Custodia.
2. Select the approved class and enter the document title.
3. Submit and inspect Custodia Handoffs for the immutable transfer receipt.
4. Open the Custodia record and follow its admission, metadata and custody process.
5. Distinguish the transfer-time Stored in Quarantine receipt from later admission or archival results.

The owner’s bytes are transferred with matching digest and canonical document identity.

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

CHAPTER 31

Additional demonstration · Schedule published Pulse output

Use this route when you need to schedule published Pulse output.

Before starting, use an eligible published dataset and the selected source context from the preparation route. Reuse existing reviewed dependencies when they meet the task; do not create duplicates.

1. Published artifact and Scheduler operation bindings
2. Define and publish an email or letter generation job
3. Bind current dataset values to job inputs
4. Execute a job and inspect its result
5. Create a one-time or recurring schedule
6. Rerun, cancel, pause, resume and retire
7. Inspect and verify execution audit evidence

CHAPTER 32

Additional demonstration · Step 1 · Published artifact and Scheduler operation bindings

Before you act	Required context
Screen / entry	Job Definitions and start a new draft only after the intended business artifact is published.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Use a published authorized dataset with a stable key and a controlled fictional record such as CASE1001. Prepare related rows if the template uses repeats. Select a maker and independent checker. For output-only demonstrations use clearly fictional addresses; for actual sending use an authorized controlled recipient and configured live transport.

Steps and field guidance

1. Open Job Definitions and start a new draft only after the intended business artifact is published.
2. Select the registered operation that matches the artifact and output in the table below.
3. Confirm the Run as identity can access that artifact and its source data. Continue to the job-definition procedure to save, preview and govern the exact binding.

Content / purpose	Registered business operation	Produced result
Source connection	NEXUS_SOURCE_REFRESH_V1 · Refresh published source connection	New authorized source snapshot
Vista report	VISTA_REPORT_V1 · Run published Vista report	Published report output
Vista dashboard	VISTA_DASHBOARD_V1 · Run published Vista dashboard (registered operation version 2)	Dashboard snapshot with all report tiles checked

Content / purpose	Registered business operation	Produced result
Pulse email	PULSE_EMAIL_V1 · Generate published Pulse email	Generated email file; sending is separate
Pulse letter	PULSE_LETTER_V1 · Generate published Pulse letter	Rendered letter/PDF output
Private draft maintenance	VISTA_RECOVERY_CLEANUP_V1 / PULSE_RECOVERY_CLEANUP_V1	Bounded removal of expired recovery copies; maintenance permission required

Published artifact + authorized Run as identity + inputs → reviewed Job Definition → published version → Schedule / Run now / Batch step → worker → owning producer → result reference

A dataset is consumed by a report/template or used for job input binding. It is not automatically a standalone executable job. The source refresh operation refreshes a published connection's snapshot. Additional external business operations must be registered with a supported input/result contract and permission model before they appear in the selector.

Expected result

The operator can identify which owning module produces the result and which job/schedule/run record coordinates it.

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

CHAPTER 33

Additional demonstration · Step 2 · Define and publish an email or letter generation job

Before you act	Required context
Screen / entry	Scheduler → Job Definitions → New job
Who acts	Scheduler Maker → independent Checker → Publisher
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Scheduler Maker → independent Checker → Publisher

Open: Scheduler → Job Definitions → New job

- 1. Choose Generate published Pulse email or Generate published Pulse letter as the Business operation. Select an approved Run as identity with access to the template and its bound datasets.
- 2. Enter a unique Job code, recognizable Job name and description. In Published content choose the required published template and exact version; the selector supplies its revision and content hash.
- 3. For a bound template supply the exact parent Record key, such as CASE1001 from the prepared dataset. Check the saved primary and related-record mappings against the current authorized data.
- 4. For an email job, enter the controlled sender and recipient in the offered contract inputs. For a letter job, use its offered record, reason and merge inputs; do not add email-only inputs.
- 5. Set a suitable timeout, maximum attempts and overlap policy. Start the initial example execution with one attempt; verify retry behavior separately after understanding possible effects.
- 6. Save the draft and use Preview on its row. Inspect the operation, execution identity, resolved input values and pinned content. Preview resolves inputs; it does not generate the output.
- 7. Submit the saved job for review. A different eligible checker previews the same revision and approves or returns it with a reason. Publish the approved job.
- 8. Retain the published job version. Continue to Run a job and inspect its producer result before enabling a schedule.

Output	Registered operation	Verify before publication
Email	PULSE_EMAIL_V1	Published email template; sender/recipient; primary record key; current dataset access.
Letter	PULSE_LETTER_V1	Published letter template; primary record key; repeated content and pagination.

A published job generates output under its selected execution identity. Sending, faxing, printing or mailing needs the corresponding configured delivery flow. Publishing a template successor does not automatically update an existing job.

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

Additional demonstration · Step 3 · Bind current dataset values to job inputs

Before you act	Required context
Screen / entry	Job definition → Inputs
Who acts	Scheduler Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Scheduler Maker

Open: Job definition → Inputs

1. Choose an input permitted by the selected operation's schema. For example, bind the email job's recipient to the authorized primary dataset's recipient_email.
2. Set Input source to Dataset field. Select the published dataset, value field recipient_email, unique key field record_id and exact record CASE1001.
3. Add the input and inspect the resulting input grid. Keep Record key consistent with the Pulse template's intended parent record.
4. Save and Preview. Confirm the currently resolved value and its dataset version/contract. Submit/review/publish the changed definition as required.
5. At execution the binding is read and validated again. Verify a changed value only using a controlled source update followed by the required snapshot refresh; then compare the actual output.

Expected result

The job reads a current authorized value for one explicitly selected record. Missing access, missing/ambiguous keys or incompatible values fail rather than silently using an unrelated record.

Dataset field binding is not "run once per every dataset row." The inspected input model selects one record per binding. Do not claim bulk-recipient fan-out, arbitrary output-to-input piping or a generic ETL loop. Use a registered business operation for any additional bulk behavior.

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

Additional demonstration · Step 4 · Execute a job and inspect its result

Before you act	Required context
Screen / entry	Scheduler → Job Runs → Run a job
Who acts	Authorized Scheduler operator
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Authorized Scheduler operator

Open: Scheduler → Job Runs → Run a job

1. Select the published Service report generation job. Preview current inputs, provide the execution reason and select Queue run. Record the run reference.
2. Refresh the run. Follow Queued → Claimed/Running → Waiting external where applicable → Succeeded or an explicit failure.
3. Open Details. Inspect the exact job version, attempt information, execution timestamps and Producer result reference.
4. Repeat for the dashboard, email and letter jobs, one at a time for the user walkthrough.
5. For each producer result, open the appropriate authorized Vista/Pulse output screen or access-controlled result view. Compare it with the manual output and intended case.
6. Record actual outcomes in LIVE_DEMO_CHECKLIST.csv. Do not mark a queued/accepted job as a successful generated output.

Job	Required success evidence	Extra check
Report	Scheduler SUCCEEDED + completed report result reference	Expected dataset scope, values and published report version
Dashboard	Scheduler SUCCEEDED + completed snapshot	Every tile available; PARTIAL is not success
Email	Scheduler SUCCEEDED + READY generated-email reference	Correct record, sender/recipient in file; no claim of send
Letter	Scheduler SUCCEEDED + READY letter/PDF reference	Correct recipient/reference and pagination

Scheduled work can run as a service identity different from the operator. Producer output lists are access-controlled and may be requester-scoped. A result absent from the operator's personal Generated Emails/Rendered letters list is not proof that no output exists. Use the authorized result access path and the scheduler's recorded producer reference; do not broaden permissions just to expose another identity's output.

Expected result

All four actual executions have a result reference and a verified output. Rehearse these before enabling a recurring schedule.

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

CHAPTER 36

Additional demonstration · Step 5 · Create a one-time or recurring schedule

Before you act	Required context
Screen / entry	Scheduler → Schedules → New schedule
Who acts	Scheduler Maker
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Scheduler Maker

Open: Scheduler → Schedules → New schedule

1. Select the published job version. Enter name/code, for example Service report weekday schedule / DEMO_REPORT_SCHEDULE.
2. For the first live execution choose Run once and a future execution time with enough time to complete review. Enter the UTC instant in the field explicitly labelled UTC.
3. Choose the display/calendar Time zone. Inspect both UTC and local time in Preview rather than relying on the browser's timezone.
4. For repetition choose Fixed elapsed interval with a UTC anchor and interval seconds, or Calendar schedule with a five-field cron expression.

- 5. Optionally select a published Business calendar. It pins that calendar version and constrains the schedule to its allowed dates/windows.
- 6. Choose the missed-execution policy and limits. Save draft, Preview upcoming dates and current input bindings, then Submit for review.
- 7. Checker performs its own current Preview and Approve or Return. An authorized publisher uses Publish and enable when the approved revision has a fresh preview.
- 8. Open Job Runs after the occurrence. Verify the schedule's run and producer result, then pause or retire the demo schedule after use.

SCREEN 16

Schedule timing, calendar and missed-execution behavior

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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

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.

Trigger	Example	Use
Run once	A chosen future UTC instant	One scheduled execution
Fixed elapsed interval	Anchor in UTC; every 3600 seconds	Elapsed hourly cadence independent of local DST

Kernel · Demo walkthrough

58 / 65

Trigger	Example	Use
Calendar schedule	0 9 * * 1-5 in the chosen timezone	09:00 on weekdays
Calendar schedule	0 9 * * 1	Monday at 09:00
Calendar schedule	0 9 1 * *	First day of each month at 09:00

Create separate schedules for the email, letter and dashboard jobs using the same procedure when they need independent timing. A schedule is a job trigger; the inspected schedule selector does not establish timer-triggered batch execution. Verify batch execution through Batches, as described later.

Check before continuing: The saved reviewed schedule references the intended published job version, timezone and calendar. Its upcoming occurrences and missed-execution behavior match the requested timing.

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

CHAPTER 37

Additional demonstration · Step 6 · Rerun, cancel, pause, resume and retire

Before you act	Required context
Screen / entry	Job Runs, Schedules and Job Definitions → eligible row actions
Who acts	Authorized operator
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

1. Open the existing run, schedule or job and inspect its current status and last producer result.
2. Choose the single action that matches your need from the table below. Check the effect on already accepted work before confirming.
3. For a rerun, preview current inputs and supply the reason; for schedule resumption, inspect upcoming dates and missed-execution behavior.
4. Confirm the eligible action once. Refresh the originating record, retain the new receipt/reference and compare it with the original history.

Who: Authorized operator

Open: Job Runs, Schedules and Job Definitions → eligible row actions

Action	Procedure	Important effect
Rerun a completed/failed eligible run	Open run → Rerun → Preview current inputs → reason → Queue run	New linked run; same approved job version; current data may differ
Cancel queued run	Select Cancel queued run and confirm the reason	Only eligible queued work; not a rollback of accepted external work
Pause schedule	Open eligible schedule row → Pause → reason	Stops future scheduling; already accepted/queued runs remain separate
Resume schedule	Preview upcoming dates/current inputs, then Resume when eligible	Missed-execution policy governs the resumption
Retire schedule	Use its offered retirement action and reason	Retains historical occurrences/runs
Retire job	Use the job's permitted retirement action	Stops new runs for the retired job; accepted work/history are retained
Create new job version	Branch/edit the supported draft → save → preview → review → publish	Dependents must explicitly select the new published version

Do not rerun uncertain external effects merely because the screen timed out. Reconciliation-required runs block automatic rerun. Changing a record to inactive or retired is not a universal cancellation or deletion mechanism.

Expected result

Every operator action has a reason and a retained audit trail. The original failed run is still visible after recovery.

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

CHAPTER 38

Additional demonstration · Step 7 · Inspect and verify execution audit evidence

Before you act	Required context
Screen / entry	Scheduler → Job Runs → Details
Who acts	Authorized auditor/operator
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Who: Authorized auditor/operator

Open: Scheduler → Job Runs → Details

1. Open a completed run and identify job version, requested/completed timestamps, status and producer result reference.
2. Review attempts and ordered audit events such as queued, claimed, dispatched, waiting external and succeeded/failed.
3. Select Download audit and retain the exported file unchanged.
4. Use the Audit file / Verify audit file control to select that file. The browser calculates its hash and verifies its receipt with the server; the full file remains in the browser.
5. If using tamper detection, use a separate edited copy of a demo audit export. Its verification should fail without altering the original server history.
6. Open the job/schedule/queue/backfill/batch Audit history where offered to connect the approval and operational actions to execution.

SCREEN 17

Run details, producer reference and audit verification

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

The screenshot displays the MediFlex Operations Workspace. The left sidebar shows a navigation menu with options like 'Your Workspace', 'Find a screen...', 'Business journeys', 'My Dashboard', 'Core', 'Scheduler', 'Job Definitions', 'Schedules', 'Job Runs' (highlighted), 'Pulse', and 'Vista'. The main content area shows the 'Run 1 - Boot acceptance LETTER' details. It includes a table with columns: Status, Job version, Requested, Completed, and Producer result reference. Below this is a section for the 'Audit file' with a 'Choose File' button and a note that the file stays in the browser. A table of 'Attempt' records shows a single successful attempt. At the bottom, a table of 'Sequence' events details the steps from 'Queued' to 'Succeeded'.

Status	Job version	Requested	Completed	Producer result reference
Succeeded	1	10/18/2026, 3:24:07 PM	10/18/2026, 3:24:27 PM	pulse-render://a1a76c43-92d9-4ec5-89fd-0e8438601b6d

Attempt	Status	Started	Dispatched	Completed
1	ACCEPTED	10/18/2026, 03:24:12 PM	10/18/2026, 03:24:16 PM	10/18/2026, 03:24:21 PM

Sequence	Event	When	Reason
1	Queued	10/18/2026, 03:24:07 PM	
2	Operator requested	10/18/2026, 03:24:07 PM	Isolated actual Boot execution acceptance
3	Claimed	10/18/2026, 03:24:12 PM	
4	Dispatched	10/18/2026, 03:24:16 PM	
5	Waiting external	10/18/2026, 03:24:21 PM	
6	Succeeded	10/18/2026, 03:24:27 PM	

- A successful scheduler run must have its producer outcome explained.
- Choose an actual exported audit file; the screenshot has no file selected.

Expected result

The authorized user can trace who created/reviewed/published the definition, what version ran, what happened at each attempt and how the output reference is preserved.

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

CHAPTER 39

Additional demonstration · Demonstration · Notification and email outcome

1. Open the notification bell using the account that received the item. Read its subject, current stage and offered action.
2. Select View outcome or the offered work-item action. If an email link requires sign-in, finish sign-in and select the profile responsible for the item.
3. Verify that the application opens the originating screen and the corresponding record or pending change, for example Profiles → the requested profile change. Inspect the current outcome; an old message can refer to work that has since completed.
4. Approve or reject only from the current owning record if your selected profile is eligible. Opening a notification does not decide the work item.
5. Use Mark as read separately. If Notification unavailable appears, select Try Again after verifying the account/context; use Switch Profile or Open Notifications as appropriate. If it persists, retain the notification reference and correlation identifier for support.

CHAPTER 40

Cross-module handoffs and the record references to retain

Next module	What to carry across	Open the related demonstration
Vista	Register/discover sources and review datasets before template selection.	Vista
Custodia	Archive exact generated output and inspect its separate custody outcome.	Custodia
Scheduler	Govern published template generation with explicit owner and record key.	Scheduler
MEDES	Use the reviewed case outcome and eligible template to prepare accountable correspondence.	MEDES

CHAPTER 41

Problem → responsible action → safe continuation

Procedure	Observed problem	Recovery
Select sources and datasets before naming the template	The source or field is missing	Resolve source publication/discovery or access in Vista rather than hardcoding a merge value.
Select sources and datasets before naming the template	Related rows are empty	Check key types, exact key value and relationship mapping; a missing collection can be a legitimate zero-child case.

Procedure	Observed problem	Recovery
Author a responsive email with reusable and repeated content	A field token remains visible	Inspect the saved key and current record binding.
Author a responsive email with reusable and repeated content	The related section repeats unrelated rows	Correct the parent-child key mapping before review or generation.
Author and paginate a letter with stable repeated sections	The canvas looks right but PDF clips	Inspect page geometry, saved revision and output pagination.
Author and paginate a letter with stable repeated sections	The wrong record is merged	Check the primary record key and saved binding before generating again.
Review, publish and generate the exact template version	Generation is pending or failed	Open the output job and producer reason before submitting another generation.
Review, publish and generate the exact template version	A suspended/retired template cannot be selected	Use an eligible published version or complete its supported lifecycle action.
Trace output, dispatch, notifications and Custodia handoff	A send has an uncertain outcome	Reconcile the existing producer/provider attempt before another release.
Trace output, dispatch, notifications and Custodia handoff	Notification unavailable appears	Confirm the recipient/profile and current outcome; record the notification/correlation if it persists.
Schedule email and letter generation with explicit ownership	The template is missing	Check published channel, active availability and execution-owner access.
Schedule email and letter generation with explicit ownership	Scheduler succeeds but no mail arrived	Check whether the operation generated a file or dispatched it; inspect separate delivery evidence.

CHAPTER 42

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
Select sources and datasets before naming the template	Show source, dataset, artifact details, primary key and saved related mapping.
Author a responsive email with reusable and repeated content	Show resolved subject/body, multiple related rows and the empty-collection layout.
Author and paginate a letter with stable repeated sections	Show normal and multi-page output, the resolved record fields and related rows.
Review, publish and generate the exact template version	Show version, review decisions, publication and the actual generated artifact.

Procedure	Evidence the audience should have seen
Trace output, dispatch, notifications and Custodia handoff	Show output reference, dispatch status, Custodia document and current notification destination as separate facts.
Schedule email and letter generation with explicit ownership	Show the job's pinned template, current record preview, run and Pulse output.

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.