

Vista — Step-by-step Walkthrough

Connect an approved HTTPS JSON source, discover typed fields, publish a selected dataset, build a service report and dashboard, then schedule exact published versions.

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 · Register a bounded source connection and discover fields
4. Demonstration · Define the source and publish a selected dataset
5. Demonstration · Model joins, calculations and filters without changing the grain silently
6. Demonstration · Build a report with meaningful table, summary and chart blocks
7. Demonstration · Review a saved report and run its published version
8. Demonstration · Compose a dashboard and schedule controlled report/visual versions
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 a report
17. Additional demonstration · Step 1 · Choose sources, datasets and artifact details
18. Additional demonstration · Step 2 · Create and edit a report
19. Additional demonstration · Step 3 · Report components, expressions and visual controls
20. Additional demonstration · Step 4 · Preview, review and publish the report
21. Additional demonstration · Step 5 · Run the published report and inspect output
22. Additional demonstration · Build and publish a dashboard
23. Additional demonstration · Step 1 · Create, review and publish a dashboard
24. Additional demonstration · Schedule published Vista output
25. Additional demonstration · Step 1 · Create and govern a job definition
26. Additional demonstration · Step 2 · Bind current dataset values to job inputs
27. Additional demonstration · Step 3 · Execute a job and inspect its result

- 28. Additional demonstration · Step 4 · Create a one-time or recurring schedule
- 29. Additional demonstration · Step 5 · Rerun, cancel, pause, resume and retire
- 30. Additional demonstration · Step 6 · Inspect and verify execution audit evidence
- 31. Cross-module handoffs and the record references to retain
- 32. Problem → responsible action → safe continuation
- 33. Close the demonstration and hand over the operating guide

Demonstration story, prepared data and participants

Connect an approved HTTPS JSON source, discover typed fields, publish a selected dataset, build a service report and dashboard, then schedule exact published versions.

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.

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
Connection/data author	Defines governed connections, named sources and dataset models.
Report/dashboard author	Builds the saved composition against approved datasets.
Independent reviewer / publisher	Previews the exact saved version and decides/publicizes it.
Runner / Scheduler operator	Executes under an identity with current data and artifact access.

Terms used in this module

Term	Meaning
Connection	Endpoint, authentication references and bounded discovery settings.

Term	Meaning
Source definition	Named typed data contract derived from an eligible registered source.
Dataset	Explicit source fields, joins, calculations and output model.
Report/dashboard version	A governed composition pinned to controlled dependencies.
Run	An execution result, separate from authoring preview.

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
Approved connection, source and modeled dataset	<u>Register a bounded source connection and discover fields</u> <u>Define the source and publish a selected dataset</u> <u>Model joins, calculations and filters without changing the grain silently</u>
Saved report to independent review and output	<u>Build a report with meaningful table, summary and chart blocks</u> <u>Review a saved report and run its published version</u>
Dashboard and scheduled producer result	<u>Compose a dashboard and schedule controlled report/visual versions</u>

CHAPTER 3

Demonstration · Register a bounded source connection and discover fields

Open	Who acts
Vista → Sources & datasets → Connections → New connection	Connection maker and reviewer

Put endpoint and authentication configuration on the connection; select the resulting source/dataset in Studio instead of pasting connection details into report content.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Connection name / code	Training Case Records / a unique training code	Identifies the connection across later discovery and publication.

Input shown on screen	Enter or select	Explain its significance
HTTPS endpoint	An approved-host endpoint serving the prepared JSON	This flow is an HTTPS JSON connector, not an arbitrary SQL database browser.
Authentication	Public API, bearer/API-key reference or username/password reference as offered	Enter an approved private credential reference; never put a secret into a report or screenshot.
JSON row path	For example data.records, or blank for a root array	Must identify the actual array returned by the endpoint.
Maximum rows / timeout	Small approved values such as 100 rows and 15 seconds	The inspected connector bounds are 500 rows, 2 MB and 1–30 seconds.
Row scope / tenant field	Tenant matching for tenant business data; public only for genuinely public data	Public scope must not be used to evade tenant filtering.

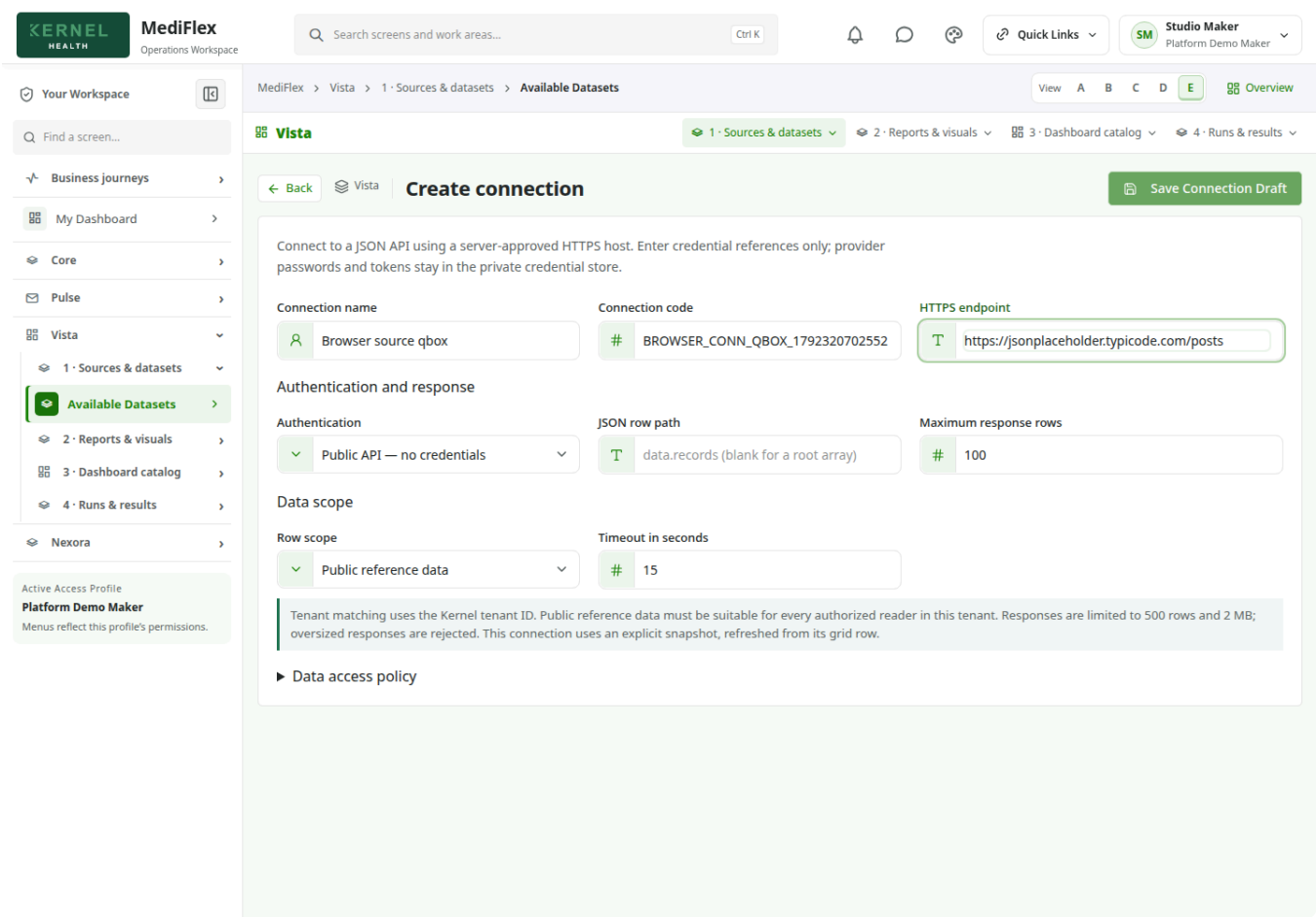
Perform and explain

Step	Demonstrator action	Point out on the screen
1	Inspect existing connections before creating another.	Reuse a suitable controlled connection.
2	Save the connection draft with endpoint, authentication reference, row path and limits.	The configuration has a revision of its own.
3	Run Test & discover; if queued, Check test result until it finishes.	A current READY result contains discovered fields/types and bounded row information.
4	Inspect the returned contract and sample rows against the endpoint.	The row path and types agree with the prepared input.
5	Submit, obtain the independent current test/review and publish.	The exact approved connection becomes available for source definition.

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.

Evidence to show before continuing

Show connection revision, private reference type, READY discovery and published contract.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
Test fails or times out	Check approved host, credential reference, response size, row path and service error; a saved draft is not a working connection.
Discovery is stale after editing	Test the new revision before submission/publication.

Next part of the demonstration

Define a named business source using the eligible connection snapshot.

CHAPTER 4

Demonstration · Define the source and publish a selected dataset

Open	Who acts
Vista → Source Definitions; Datasets → New dataset	Data author and independent reviewer

Give the data contract a business name, then select explicit fields for the intended report/template use.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Source name/code	Training Cases / a unique source code	A source definition is separate from the external connection.
Connection / discovered contract	The eligible published connection and current fields	The source must identify the intended available snapshot.
Dataset name/code	Training Case Summary / a unique dataset code	The dataset belongs to its selected source model.
Selected outputs	record_id, name, status and amount in the prepared fixture	Choose only necessary permitted fields and retain their types.
Preview rows	Current authorized input	Empty results may be valid filtering; they must not be replaced by hardcoded sample values.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Create the source definition against the eligible connection/registered source.	The named source exposes a typed field contract.
2	Save/review/publish the source through its offered lifecycle.	Only an eligible controlled source is selected downstream.
3	Create the dataset, select the intended source(s) and explicit output fields.	The model has one declared output schema.
4	Preview and compare 3 training rows, total 2000 and OPEN total 1500.	The intended grain and typed values can be checked.

Step	Demonstrator action	Point out on the screen
5	Save the dataset and have the independent reviewer preview the same saved model.	The decision covers the actual selected fields and data model.
6	Publish and retain the dataset version/reference.	Studio can bind the eligible dataset.

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 displays the MediFlex Operations Workspace interface. The top navigation bar includes the Kernel Health logo, the MediFlex Operations Workspace title, a search bar, and various utility icons. The left sidebar shows a 'Your Workspace' section with a list of items: Business journeys, My Dashboard, Pulse, Vista, 1 · Sources & datasets, Available Datasets (highlighted), 2 · Reports & visuals, 3 · Dashboard catalog, 4 · Runs & results, and Nexora. The main content area is titled 'Vista' and shows the 'Source Definitions' tab selected. Below the tabs, there's a 'Source Definitions' section with a description: 'Define a named source using an approved connection. Published sources supply fields to datasets.' A search bar for 'Search loaded records...' is present. A table lists three sources:

Source Name	Code	Connection / Provider	Version	Status	Actions
Report Catalogue	VISTA_CATALOGUE	MediFlex catalogue	—	PUBLISHED	Preview, Create Dataset
External test records	NX_7fc6ad11372044098b31152237ecb8e0	MediFlex	1	PUBLISHED	Preview, Create Dataset
Model albums source	NX_9d5bed372e2c4202b854836e5d7fd3e	MediFlex	1	PUBLISHED	Preview, Create Dataset

At the bottom of the table, it says 'Showing 1-3 of 3' and 'Page 1 / 1'.

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

Evidence to show before continuing

Show connection → named source → dataset as three distinct controlled records.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
Fields are missing	Check discovery/source publication, current profile and the source owner's field access.
The same source name appears several times	Compare code, connection and version rather than selecting by label alone.

Next part of the demonstration

For a simple report retain one row per case; use the modeling procedure when combining sources.

CHAPTER 5

Demonstration · Model joins, calculations and filters without changing the grain silently

Open	Who acts
Dataset → Dataset structure → Model sources, joins and calculations	Dataset author and reviewer

Combine sources deliberately and inspect cardinality before using totals or charts.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Source aliases	For example main and items	Qualify fields when sources have the same column names.
Join keys / kind	main.record_id = items.case_id; LEFT or INNER	LEFT retains unmatched parent rows; INNER keeps matches only.
Output names/types	Distinct output names and selected typed fields	The inspected model supports 1–3 sources and 1–40 named outputs.
Calculated expression	Use offered arithmetic/text/date/condition controls	The expression language is bounded; it is not arbitrary executable scripting.
Filters	For example status equals OPEN	Filters alter both detail and aggregate interpretation; up to 12 supported boolean filters are inspected.

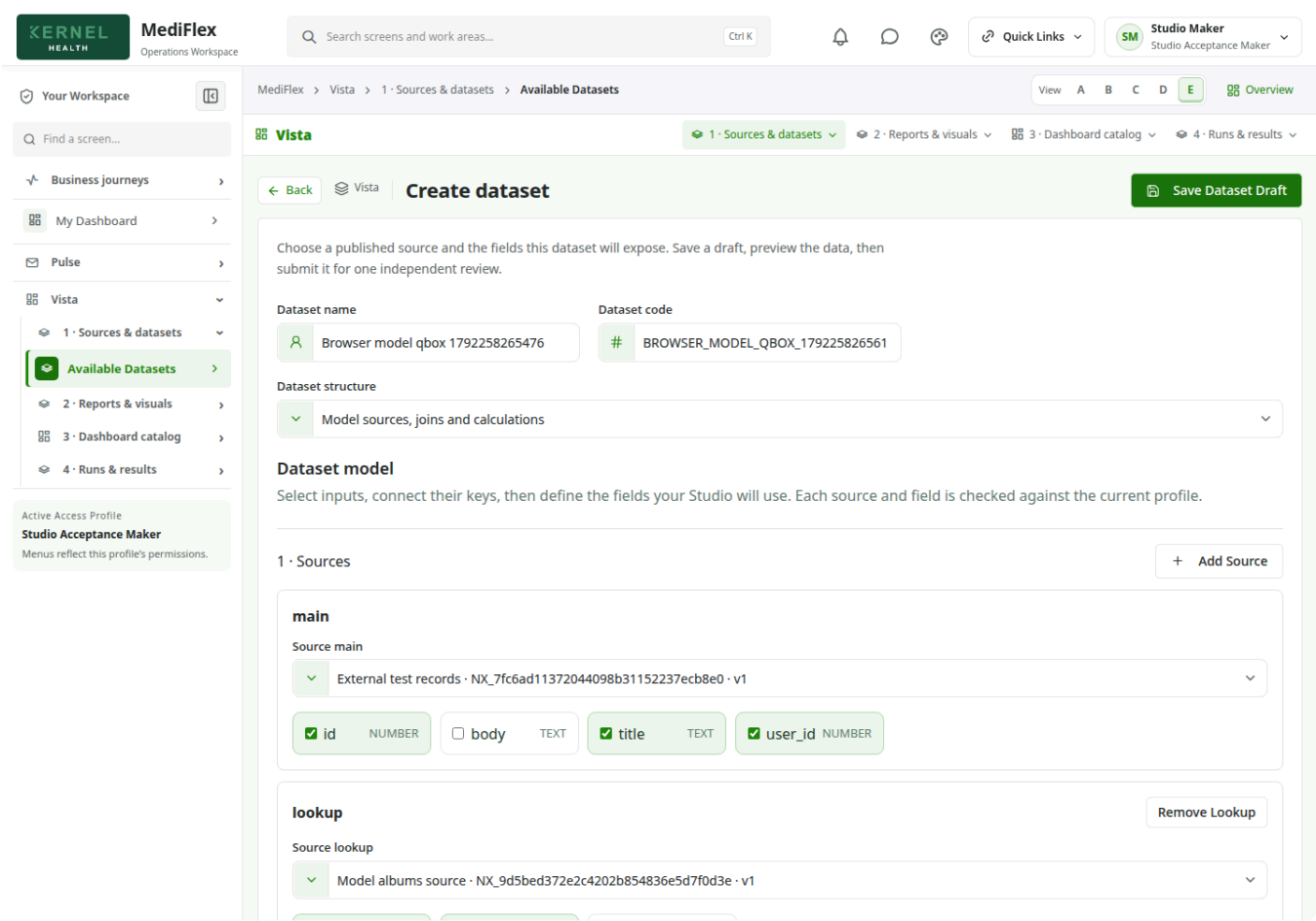
Perform and explain

Step	Demonstrator action	Point out on the screen
1	Choose a primary source and add the required secondary source.	Every additional source has an intended join.
2	Select compatible keys and the join type.	Unmatched-row behavior is explicit.
3	Select named outputs and add a calculation with the offered expression controls.	Output types agree with the calculation.
4	Preview matched, unmatched, empty and zero-value cases.	Null keys do not match and divide-by-zero resolves to empty output under the inspected model.
5	Compare parent count before and after a one-to-many join.	Repeated parent amounts are identified before summing.
6	Save, independently preview/review and publish the exact model.	The governed dataset retains the intended grain and calculation contract.

SCREEN 3

Dataset model: selected sources and fields

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

Evidence to show before continuing

Show join kind, preview cardinality and one calculation with its expected values.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
Totals increase unexpectedly	Check duplicate join keys and parent repetition before changing chart formulas.
A calculation is empty	Inspect null/missing inputs, field type and divide-by-zero behavior.

Next part of the demonstration

Use the published model as the report’s primary dataset; use Pulse related collections for parent/detail composition when appropriate.

CHAPTER 6

Demonstration · Build a report with meaningful table, summary and chart blocks

Open	Who acts
Vista → Create Report → source/dataset selection → report details → Report Studio	Report author

Start from the approved data and the business question, then author the composition. Template choice alone does not create a verified report.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Source(s) / dataset	The eligible Training Case Summary model	Select a dataset belonging to the selected source(s).
Report name/code/details	Training Case Operations / unique code and purpose	Set the artifact identity before opening Studio.
Heading / text / data table	A clear title, reporting scope and selected columns	Body content must explain the data being displayed.
Summary / chart grouping / measure	Count cases; group by status; sum amount	Expected fixture values are OPEN 2/1500 and CLOSED 1/500.
Chart style / pivot / expressions	Use the offered type that fits the business question	A line implies meaningful ordered points; a category comparison is often better as bars/columns.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Follow source → dataset → artifact details and open Studio.	The composition has an explicit saved data context.
2	Add a title, scope text and a detail table with the intended fields.	The report is readable before visual embellishment.
3	Add a case-count summary and a status chart.	Grouping and measures use the typed model fields.

Step	Demonstrator action	Point out on the screen
4	Use a calculated or conditional display only where it explains a real rule.	Empty and zero cases remain understandable.
5	Save Draft and open the saved current-data preview.	The values match the prepared fixture/model.
6	Inspect print/PDF pagination and the table/visual boundaries.	The output is readable across pages, not merely on the design canvas.

SCREEN 7

Report Studio starts with a blank composition

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

Evidence to show before continuing

Show count 3, amount 2000, status breakdown and readable saved output.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A placeholder does not resolve	Check the saved dataset field binding and current authorized data.
The preview differs from the canvas	Inspect the saved revision, run/current-data context and pagination rather than treating the sample canvas as final output.

Next part of the demonstration

Submit the exact saved previewed report for independent review and publication.

CHAPTER 7

Demonstration · Review a saved report and run its published version

Open	Who acts
Report Catalog / Report Studio → selected report → review, publish and run	Independent reviewer, publisher and runner

Approve the exact saved report rather than the author’s unsaved canvas, then run its controlled publication under current data access.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Saved version / review state	The submitted report revision	Draft, submitted, approved and published are separate stages.
Dataset / preview	The linked model and current authorized rows	A reviewer needs a current preview for the submitted revision.
Decision reason	What was accepted or returned	The prior publication remains the controlled version until a new one is published.
Run parameters / published version	The exact eligible artifact and offered input	A run records execution and output separately from the design preview.

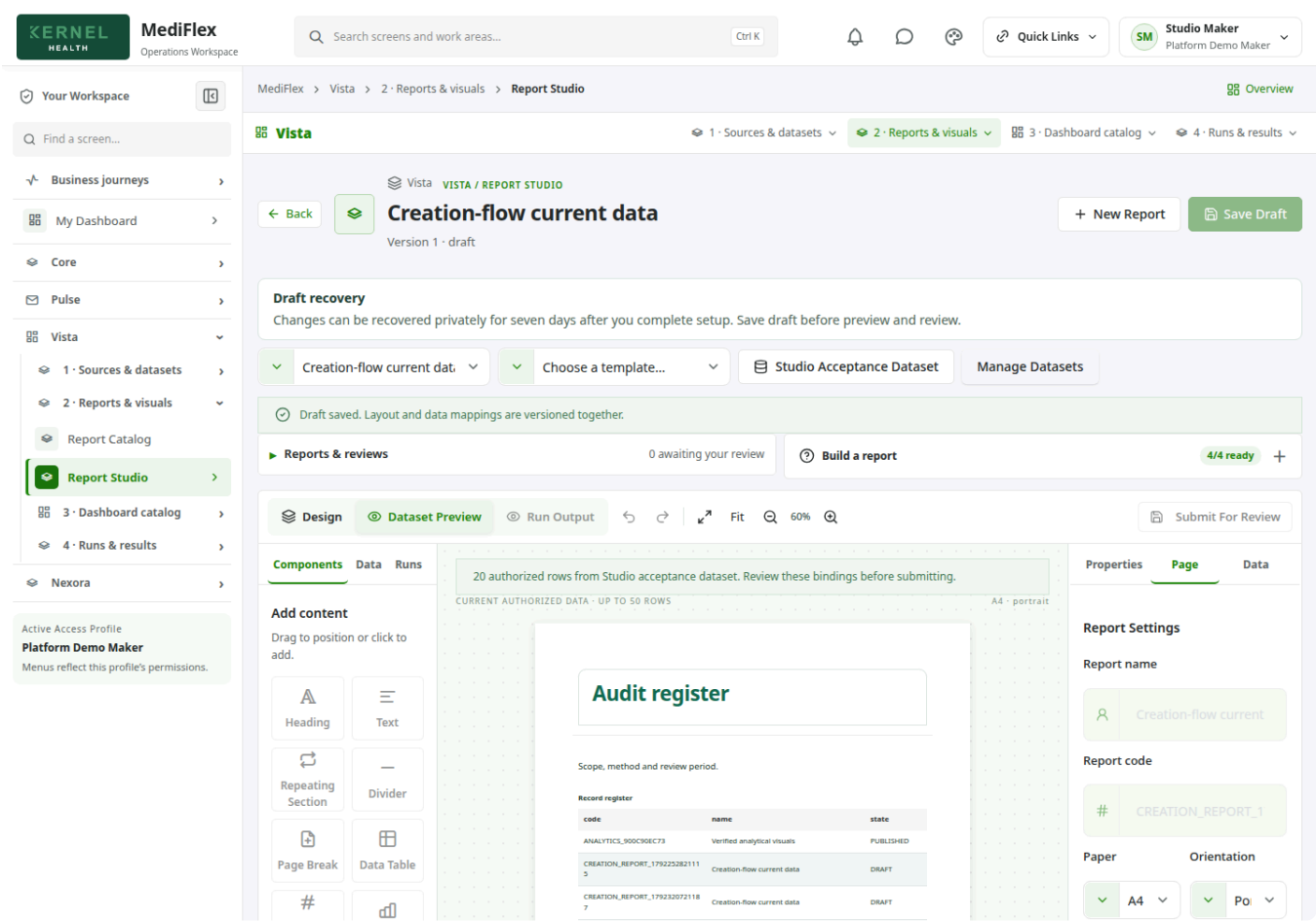
Perform and explain

Step	Demonstrator action	Point out on the screen
1	The author saves and previews the intended revision, then submits.	The request is attached to the report.
2	The independent reviewer opens that record, inspects dataset and current preview and records the decision.	The decision covers the saved version.
3	Publish the eligible approved version.	The report catalog identifies a published version separately from latest authoring.
4	Run the published report and inspect My Report Runs.	The run has a durable producer/output reference.
5	Open the generated output and compare values, headers and pages.	The result is supported by the executed version and data.
6	For a later revision, create/save/review/publish it explicitly.	The earlier publication and run evidence remain retained.

SCREEN 8

Saved report preview with current dataset rows

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- The preview identifies current authorized data and its bounded row count.
- Changing the saved revision invalidates review eligibility.

Evidence to show before continuing

Show latest versus published version, the independent decision and an actual run output.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
Approval is missing	Check reviewer permission, subject independence, current state and preview freshness.
A run fails despite publication	Inspect data authorization and output worker/producer status; publication alone does not guarantee current execution succeeds.

Next part of the demonstration

Compose a dashboard from published visuals or bind the published report to Scheduler.

CHAPTER 8

Demonstration · Compose a dashboard and schedule controlled report/visual versions

Open	Who acts
Vista → Dashboards → composition; Scheduler → Job Definitions	Dashboard author/reviewer and Scheduler operator

Build a governed dashboard from eligible published visual/report content and retain the exact version dependencies used by scheduled execution.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Dashboard title/details	Training Operations Dashboard	Explains the audience and decision it supports.
Tile / report / visual version	Eligible published content	A draft visual is not a scheduled dashboard dependency.
Layout / tile order	The offered composition controls	Keep the primary measures readable at desktop and narrow widths.
Scheduler business operation	Run published Vista report or dashboard	Select the registered operation matching the artifact type.
Execution identity / inputs	An eligible identity with access to every dependent dataset/tile	Interactive author access is not the same as execution-owner access.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Select published visuals and place them in a clear dashboard order.	Every tile has an identifiable controlled source.
2	Preview and inspect both populated and empty results.	The dashboard handles current data coherently.
3	Save, independently review and publish the dashboard.	The publication pins its intended dependencies.
4	Create a Scheduler job using the matching report/dashboard operation and selected published content.	Version/revision/hash are supplied by the artifact selector.

Step	Demonstrator action	Point out on the screen
5	Preview the job, review/publish it and execute a controlled run.	The Scheduler result links to the Vista producer/output.
6	Inspect every tile/report result before declaring dashboard success.	A missing or denied dependency is visible rather than hidden behind a successful parent request.

SCREEN 9

Dashboard composition uses published report visuals

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The screenshot displays the MediFlex Operations Workspace interface. The top navigation bar includes the 'MediFlex' logo, a search bar, and various utility icons. The left sidebar shows a 'Your Workspace' section with a search bar and a list of navigation items: 'Business journeys', 'My Dashboard', 'Pulse', 'Vista', and 'Dashboards'. The 'Dashboards' item is currently selected. The main content area is titled 'Vista / DASHBOARD STUDIO' and shows the 'Current data dashboard' in 'Design' mode. The interface is divided into three main sections: 'Published report visuals' on the left, 'Dashboard Canvas' in the center, and 'Dashboard Properties' on the right. The 'Published report visuals' section lists a specific report visual with a reference ID '8ef3e881c5' and a published version '1'. The 'Dashboard Canvas' is a large empty area with a dashed border and a central prompt to 'Drop a published report here'. The 'Dashboard Properties' panel on the right shows the 'Dashboard Name' as 'Current data dashboa' and the 'Dashboard Code' as 'CREATION_FLOW_DAS'. The 'Build a dashboard' section at the top of the main area includes a 'Design' tab and a 'Live Snapshot' button.

- A dashboard can combine visuals using different datasets.
- Each tile retains the exact approved report version; the blank canvas is expected before adding visuals.

Evidence to show before continuing

Show dashboard publication, pinned report tiles, job preview and the resulting producer references.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A tile cannot execute	Resolve that report/dataset's current authority or version availability.
A new report version should appear	Adopt it through dashboard/job revision and governance; do not silently change pinned dependencies.

Next part of the demonstration

Use the Scheduler handbook for recurrence, backfill, queues, retries and batch recovery.

CHAPTER 9

Additional demonstration · Access, prerequisites and example values

Prepare two eligible identities for independent review, a registered/testable source connection, permitted source fields and a small synthetic dataset. Use the supplied service-record sample for explanation; create records through the supported source flow rather than assuming the examples already exist in Azure.

Input / choice	Example or selection	Meaning / check
Connection / authentication reference	Named approved source and private credential reference where required	Use references, not secret values in the report or demo notes.
Dataset code/name	DEMO_SERVICE_DATA / Service operations data	Select the source(s), typed fields and supported model operations; keep a stable business key.
Field selection	record_id, status and other available source fields	Only use fields actually exposed by the selected contract. Identical labels across sources do not establish a valid join.
Model / calculated field	A supported expression, transform or join with explicit types	Preview cardinality and null/missing cases; use the editor's admitted syntax rather than arbitrary SQL.
Report details	Service operations report; intended dataset and page settings	Start blank or choose a template, then replace placeholder bindings with actual fields.
Dashboard tiles	Published report visuals and their exact versions	A dashboard does not silently adopt a later report revision.
Scheduler artifact pin	Published report/dashboard chosen by name	The selector supplies identity, version, revision and hash; do not invent these values manually.

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.

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

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	Prepare two eligible identities for independent review, a registered/testable source connection, permitted source fields and a small synthetic dataset. Use the supplied service-record sample for explanation; create records through the supported source flow rather than assuming the examples already exist in Azure.

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 screenshot displays the 'Create connection' form within the MediFlex Operations Workspace. The interface includes a top navigation bar with the 'KERNEL HEALTH' logo, 'MediFlex Operations Workspace', a search bar, and various utility icons. A left sidebar shows the 'Your Workspace' menu with options like 'Business journeys', 'My Dashboard', 'Core', 'Pulse', 'Vista', and 'Nexora'. The main content area is titled 'MediFlex > Vista > 1 · Sources & datasets > Available Datasets'. The 'Create connection' form is the central focus, with a 'Save Connection Draft' button in the top right. The form contains several sections: 'Connection name' (set to 'Browser source qbox'), 'Connection code' (set to 'BROWSER_CONN_QBOX_1792320702552'), and 'HTTPS endpoint' (set to 'https://jsonplaceholder.typicode.com/posts'). The 'Authentication and response' section shows 'Authentication' set to 'Public API — no credentials' and 'JSON row path' set to 'data.records (blank for a root array)'. The 'Data scope' section shows 'Row scope' set to 'Public reference data' and 'Timeout in seconds' set to '15'. A 'Maximum response rows' field is set to '100'. A note at the bottom states: 'Tenant matching uses the Kernel tenant ID. Public reference data must be suitable for every authorized reader in this tenant. Responses are limited to 500 rows and 2 MB; oversized responses are rejected. This connection uses an explicit snapshot, refreshed from its grid row.' A 'Data access policy' link is also visible.

- 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.

CHAPTER 12

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.

CHAPTER 13

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 displays the MediFlex Operations Workspace interface. The top navigation bar includes the Kernel Health logo, the MediFlex Operations Workspace title, a search bar, and various utility icons. The left sidebar contains a 'Your Workspace' section with links to Business journeys, My Dashboard, Pulse, Vista, and Nexora. The main content area is titled 'Vista' and shows the 'Source Definitions' tab selected. Below the tabs, there's a 'Source Definitions' section with a 'Refresh' button and a 'New Source' button. A table lists three sources: 'Report Catalogue', 'External test records', and 'Model albums source'. Each source has a 'Code', 'Connection / Provider', 'Version', and 'Status' (all are 'PUBLISHED'). Action buttons for 'Preview' and 'Create Dataset' are available for each source. The bottom of the table 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

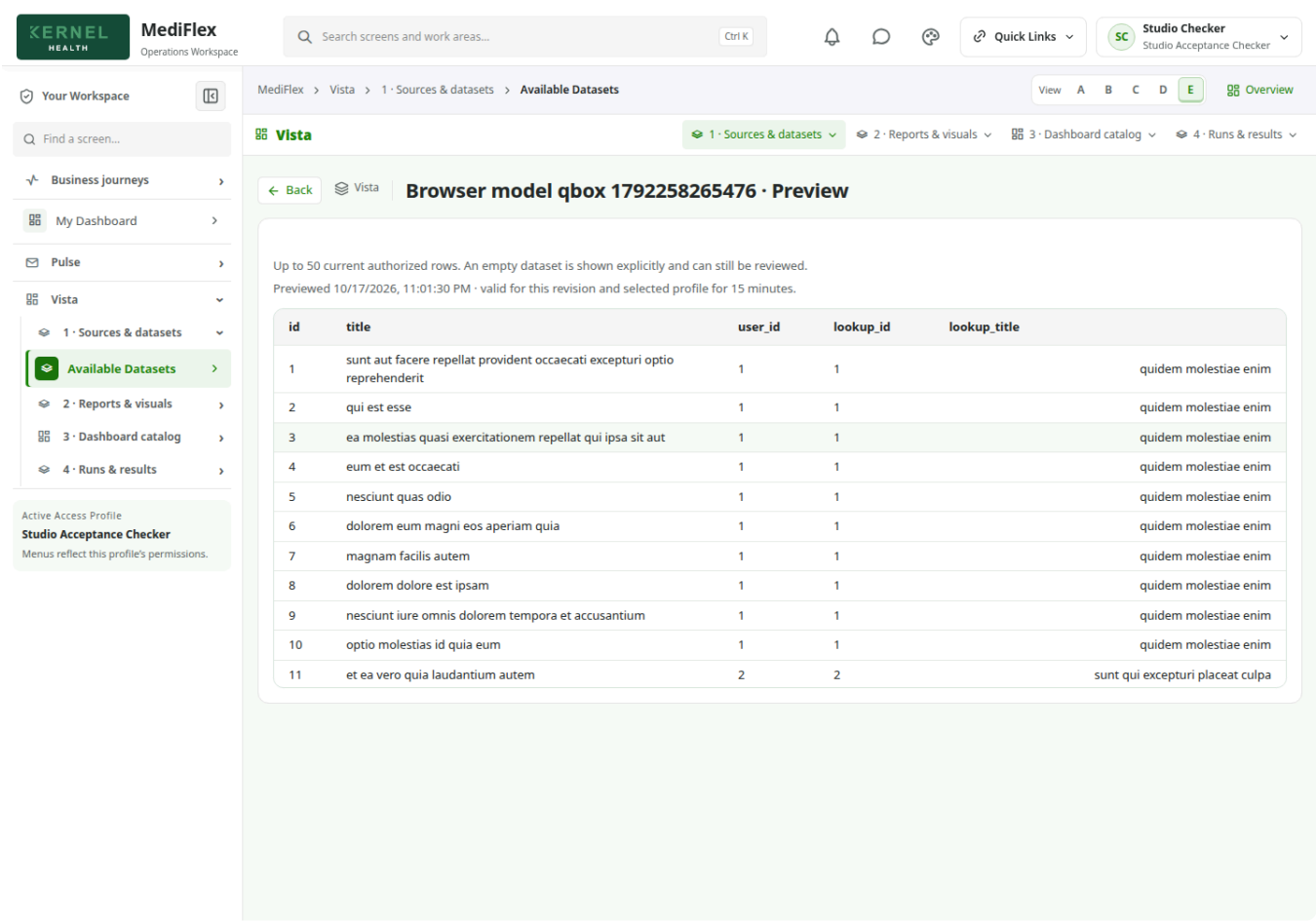
Model albums source · NX_9d5bed372e2c4202b854836e5d7fd3e · v1

- 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



- 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 a report

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

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. Create and edit a report
3. Report components, expressions and visual controls
4. Preview, review and publish the report
5. Run the published report and inspect 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	Prepare two eligible identities for independent review, a registered/testable source connection, permitted source fields and a small synthetic dataset. Use the supplied service-record sample for explanation; create records through the supported source flow rather than assuming the examples already exist in Azure.

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 MediFlex Operations Workspace, 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. 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 (active), 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 'Find a source' search bar and a list of sources from the 'Report Catalogue' (VISTA_CATALOGUE) with 3 fields. A note states 'New sources and datasets become selectable after independent review and publication.' at the bottom.

- 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 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 tabbed interface with four tabs: 1 Sources, 2 Datasets, 3 Basic details (active), and 4 Studio. The 'Basic details' tab contains a 'Name your report' section 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 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 · Create and edit a report

Before you act	Required context
Screen / entry	Vista → Reports & visuals → Report Studio → New report
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 → Reports & visuals → Report Studio → New report

1. Complete the shared setup using Service records → Service review dataset → Service operations report / DEMO_SERVICE_REPORT.
2. Open the blank canvas. Choose an optional layout from the toolbar, or add individual components.
3. Add a Heading: Service operations review. Add a short Text block describing scope and date.
4. Add a Summary Card named Total records using count. Add another card for Total amount using sum of amount.
5. Add a Chart: Columns or Horizontal bars. Group by region and aggregate amount by sum.
6. Add a Data Table with record_id, recipient_name, region, status and amount. Set useful widths and number formatting.
7. In Page settings choose paper/orientation/margins; keep the report readable at its actual output size. Use Page Break when a new section should start on a new page.
8. Check the Data tab for selected columns, placeholder mappings and any layout problems. Save draft with a clear reason.

SCREEN 7

Report Studio starts with a blank composition

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

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

Expected result

The saved report contains a real dataset reference and named visual blocks. For the full four-record synthetic result, count is 4 and sum is 4000; confirm the actual preview scope before using those totals.

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 · Report components, expressions and visual controls

Before you act	Required context
Screen / entry	the saved report draft in Report Studio and select the component to configure.
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

1. Open the saved report draft in Report Studio and select the component to configure.
2. Choose a supported component or chart type from the tool reference below. Bind fields of the expected types and configure aggregation, grouping and formatting.
3. For a pivot, choose the row field, column field and numeric measure. For expressions, use the offered expression controls and inspect empty values and zero denominators.
4. Save the draft, render its saved preview with current authorized data and compare visible values with the dataset. Correct any validation or layout problem before independent review.

Tool	Short user walkthrough
Charts	Switch the same region/amount visual between bars, columns, line, area, donut and pie where meaningful
Stacked columns	Use region as category and status as the series field
Scatter plot	Choose two genuinely numeric fields; do not force a text status into an axis
Pivot table	Rows = region, columns = status, measure = sum amount
Calculated measures	Use the offered numeric expression controls and check empty/zero-denominator behavior
Repeating section	Choose supported dataset fields to repeat in the body
Formatting	Titles, alignment, section placement, number/currency/percent formatting, paper and margins
Editing	Select, move, duplicate/delete supported blocks, Undo/Redo and focus mode
Draft recovery	Restore an offered working copy, then explicitly save and preview the resulting revision

The inspected chart styles are horizontal bars, columns, line, area, donut, pie, stacked columns and scatter. Use the chart type that explains the data. A meaningful three-visual report is a stronger demo than cycling through every option.

Working-copy recovery is not publication and is not a substitute for Save draft. A restored layout must still pass current validation, current-data preview and independent review. Do not claim unsupported expressions, unlimited blocks or arbitrary scripting.

Check before continuing: The saved report preview renders the configured charts, expressions and pivots with current authorized values, including the tested empty/zero cases.

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 20

Additional demonstration · Step 4 · Preview, review and publish the report

Before you act	Required context
Screen / entry	Report Studio → saved report / Reports & reviews
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: Report Studio → saved report / Reports & reviews

1. Save all edits. Choose Dataset Preview for the saved report. Wait for current authorized rows to load and inspect the rendered components, not just the field names.
2. Confirm the report revision, dataset contract and displayed scope. Correct any missing field, unavailable source or layout problem; save and preview again.
3. Choose Submit for review on the report’s row or the corresponding Studio action. Provide the requested reason and confirm.
4. Checker opens that report from the catalog/row, previews the same saved revision with its own current access, then selects Approve or Return.

- After approval, an authorized publisher selects Publish and confirms the reason. Verify the catalog's published version.
- Show a returned draft only if prearranged: the author corrects it, saves, previews and resubmits through one new independent decision.

SCREEN 8

Saved report preview with current dataset rows

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, MediFlex Operations Workspace, a search bar, and user information for Studio Maker. The left sidebar shows a workspace menu with options like Business journeys, My Dashboard, Core, Pulse, Vista, Report Catalog, Report Studio (selected), 3 · Dashboard catalog, 4 · Runs & results, and Nexora. The main content area is titled 'Creation-flow current data' (Version 1 · draft) and includes a 'Draft recovery' section. Below this, there are tabs for 'Creation-flow current dat.', 'Choose a template...', 'Studio Acceptance Dataset', and 'Manage Datasets'. A status bar indicates 'Draft saved. Layout and data mappings are versioned together.' and '0 awaiting your review'. The central preview area shows a table titled 'Audit register' with columns for code, name, and state. The table contains three rows of data. The right sidebar contains 'Report Settings' with fields for Report name, Report code, Paper, and Orientation.

code	name	state
ANALYTICS_90DC90ECT3	Verified analytical visuals	PUBLISHED
CREATION_REPORT_179223282111	Creation-flow current data	DRAFT
CREATION_REPORT_179232072118	Creation-flow current data	DRAFT

- The preview identifies current authorized data and its bounded row count.
- Changing the saved revision invalidates review eligibility.

Expected result

The report is PUBLISHED and available as a dashboard visual source and Scheduler report artifact.

The Report Catalog's lightweight preview can show up to 10 current rows. It is useful for inspection, but use the saved-revision Studio preview required for submission/approval. Design examples or sample rows do not establish review eligibility. The workflow is Draft → one independent review → Approved → Publish, not several independent approval levels.

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 21

Additional demonstration · Step 5 · Run the published report and inspect output

Before you act	Required context
Screen / entry	Published report → Run Report; then Run Output / Runs
Who acts	Authorized report runner
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 report runner

Open: Published report → Run Report; then Run Output / Runs

1. Choose the published report/version. Select Run Report and provide the execution reason.
2. Wait for the actual run to complete. Open its Run Output; record the run reference and completion status.
3. Compare the output’s dataset/columns and key values with the intended source snapshot and profile scope. Preview limits and full-run limits can differ; do not infer totals from an incomplete preview.
4. Use CSV, Excel or Print/PDF when permitted. Check table headings, numeric formatting, page boundaries and footer/content placement.
5. Keep the completed run reference for comparison with the scheduled run later.

Expected result

A completed output belongs to the published version and the authorized execution. Viewing the designer or obtaining a preview does not itself create this run.

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 22

Additional demonstration · Build and publish a dashboard

Use this route when you need to build and publish a dashboard.

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. Create, review and publish a dashboard

CHAPTER 23

Additional demonstration · Step 1 · Create, review and publish a dashboard

Before you act	Required context
Screen / entry	Vista → Dashboard catalog → Dashboards → New dashboard
Who acts	Maker
You need	Prepare two eligible identities for independent review, a registered/testable source connection, permitted source fields and a small synthetic dataset. Use the supplied service-record sample for explanation; create records through the supported source flow rather than assuming the examples already exist in Azure.

Steps and field guidance

Who: Maker

Open: Vista → Dashboard catalog → Dashboards → New dashboard

1. Complete Sources → Datasets → Basic details using Service operations dashboard / DEMO_SERVICE_DASH. Select every dataset whose published report visuals you intend to add.
2. In Published report visuals, find Service operations report. Add its Total records KPI, Total amount KPI, Region chart and Detail table as separate tiles.
3. Use Arrange tiles for Balanced, Featured lead visual or Compact. Adjust each tile's title, width and order. The grid has 12 columns and the inspected editor supports up to 8 tiles.
4. Save draft. Use the saved dashboard Preview to load current authorized rows for each pinned report visual. Verify every tile.
5. Maker submits the saved revision for review. Checker independently previews it and approves or returns from the dashboard record/row.
6. Publish the approved dashboard. Use Refresh Dashboard to produce a live snapshot and inspect the date/version and individual tile results.
7. Open a tile's available drill-down and verify Print/PDF if permitted.

SCREEN 9

Dashboard composition uses published report visuals

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

The screenshot displays the 'Current data dashboard' configuration interface within the MediFlex Operations Workspace. The interface is divided into several sections:

- Left Sidebar:** Contains navigation links for 'Your Workspace', 'Business journeys', 'My Dashboard', 'Pulse', 'Vista', and 'Dashboards'. The 'Dashboards' section is currently selected.
- Top Header:** Includes the 'MediFlex Operations Workspace' logo, a search bar, and a 'Quick Links' dropdown.
- Main Content Area:**
 - Build a dashboard:** A section with a 'Design' tab and a 'Live Snapshot' button. It indicates '1/4 ready'.
 - Published report visuals:** A list of available report visuals. One is highlighted: 'Studio acceptance reference' (ID: 8ef3e881c5, Published Version 1, 1 visual).
 - Dashboard Canvas:** A large central area for arranging report visuals. It contains a plus sign and the text 'Drop a published report here'.
 - Dashboard Properties:** A panel on the right showing the dashboard name 'Current data dashboa' and the code 'CREATION_FLOW_DAS'.

- A dashboard can combine visuals using different datasets.
- Each tile retains the exact approved report version; the blank canvas is expected before adding visuals.

Expected result

The dashboard is PUBLISHED with all intended tiles available. It becomes selectable in the Scheduler dashboard operation.

A dataset alone is not a dashboard tile. Publish a report containing the desired KPI/chart/table first. A newly published report version does not silently replace a tile's pinned report version. An unavailable tile is visible as a problem; do not present a partial dashboard as complete.

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 · Schedule published Vista output

Use this route when you need to schedule published Vista 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. Create and govern a job definition
- 2. Bind current dataset values to job inputs
- 3. Execute a job and inspect its result
- 4. Create a one-time or recurring schedule
- 5. Rerun, cancel, pause, resume and retire
- 6. Inspect and verify execution audit evidence

Additional demonstration · Step 1 · Create and govern a job definition

Before you act	Required context
Screen / entry	Scheduler → Job Definitions → New job
Who acts	Scheduler Maker
You need	Prepare two eligible identities for independent review, a registered/testable source connection, permitted source fields and a small synthetic dataset. Use the supplied service-record sample for explanation; create records through the supported source flow rather than assuming the examples already exist in Azure.

Steps and field guidance

Who: Scheduler Maker

Open: Scheduler → Job Definitions → New job

- 1. Choose Business operation: Run published Vista report. Select the approved Run as execution identity.
- 2. Enter Job name: Service report generation and Job code: DEMO_REPORT_JOB. Add a useful description.
- 3. In Published content choose Service operations report and its published version by name. The application fills its identity, version, revision and content hash.

4. Add Reason as a text Value: Reference-data setup: generate the approved service operations report. Use the offered contract inputs; do not invent reportId/version values.
5. Set Timeout to 300 seconds for the walkthrough if appropriate. Start with Maximum attempts 1 and overlap policy Wait in queue. Verify retry tuning separately.
6. Save draft. Select Preview on the saved job row. Inspect the operation, execution context, resolved values and pinned artifact.
7. Return to the row and Submit for review. Checker independently previews the same revision, then Approve or Return. Publish the approved job version.

SCREEN 10

Job inputs bind a named published report

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

MediFlex
Operations Workspace

Ctrl K

Quick Links

Studio Maker
Platform Demo Maker

Your Workspace

Find a screen...

Business journeys

My Dashboard

Core

Scheduler 3

Job Definitions

Schedules

Job Runs

Pulse

Vista

Nexora

Active Access Profile

Platform Demo Maker

Menus reflect this profile's permissions.

Job name

Browser scheduled artifact qbox 1792317514

Job code

BROWSER_QBOX_1792317514167

Description

Enter description

Published content

Published report

Karthi_Vista_Test · KARTHI_VISTA_TEST · v1

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

Inputs

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

Search loaded records...

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

Showing 1-1 of 1

<<

<

>

>>

Page 1 / 1

Input name

Input source

Value type

Value

Choose an input

Value

TEXT

T

+ Add Input

Execution policy

Timeout (seconds)

Maximum attempts

Initial retry delay (seconds)

Maximum retry delay (seconds)

300

1

30

300

If a previous run is still active

Wait in queue

The registered operation supports a stable retry key.

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

SCREEN 11

Job preview resolves inputs without executing the business operation

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 MediFlex Operations Workspace title, a search bar, and various utility icons. The left sidebar shows a navigation menu with options like 'Your Workspace', 'Business journeys', 'My Dashboard', 'Core', 'Scheduler', 'Job Definitions' (highlighted), 'Schedules', 'Job Runs', 'Pulse', 'Vista', and 'Nexora'. The main content area is titled 'Preview · Browser scheduled artifact qbox 1792317514110'. It contains a message: 'Current input values and the registered operation are shown. Preview does not execute the business operation.' Below this, there are three columns: 'Saved version' (1 · Revision 1), 'Preview valid until' (10/18/2026, 3:43:45 PM), and 'Timeout' (300 seconds). A search bar for 'Search loaded records...' is present. A table with two columns, 'Input' and 'Current Value', lists several fields: 'reason' (Scheduled reporting browser acceptance), 'reportId' (becfa741-93cf-4fbe-a2a9-455f6321af70), 'versionId' (22507ced-4e69-46c2-a9be-c28793a9bef6), 'contentHash' (80e46d065ba9d05c6e14752dcdbcb692c75540a2a26ae0092c8ebbdd5a5496f9), and 'expectedRevision' (4). At the bottom of the table, it says 'Showing 1-5 of 5'. Below the table, a message states: 'Return to the job row to submit or review. Changed data, permissions or draft details require a new preview.'

- Preview establishes current saved-definition eligibility.
- It does not generate the report; an actual run comes later.

Expected result

A published report job is available to Run a job, Schedules and compatible batch steps.

A job's saved artifact reference is pinned. Publishing report version 2 does not make this job use version 2. Change the job through its supported new-version/review/publication flow and then update dependent schedules/batches explicitly.

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 26

Additional demonstration · Step 2 · 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 3 · 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 28

Additional demonstration · Step 4 · 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 12

Schedule timing, calendar and missed-execution behavior

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

Kernel Health

MediFlex

Operations Workspace

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

47 / 53

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 29

Additional demonstration · Step 5 · 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 30

Additional demonstration · Step 6 · 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 13

Run details, producer reference and audit verification

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

MediFlex
Operations Workspace

Ctrl K

Quick Links

Studio Checker
Platform Demo Checker

Your Workspace

Business journeys

My Dashboard

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.

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

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 31

Cross-module handoffs and the record references to retain

Next module	What to carry across	Open the related demonstration
Pulse	Reuse eligible source/dataset definitions for saved primary/related content bindings.	Pulse
Scheduler	Select the exact published report/dashboard operation and retain producer output.	Scheduler
IAM	Recheck execution-owner data and artifact access.	IAM

CHAPTER 32

Problem → responsible action → safe continuation

Procedure	Observed problem	Recovery
Register a bounded source connection and discover fields	Test fails or times out	Check approved host, credential reference, response size, row path and service error; a saved draft is not a working connection.
Register a bounded source connection and discover fields	Discovery is stale after editing	Test the new revision before submission/publication.
Define the source and publish a selected dataset	Fields are missing	Check discovery/source publication, current profile and the source owner's field access.
Define the source and publish a selected dataset	The same source name appears several times	Compare code, connection and version rather than selecting by label alone.
Model joins, calculations and filters without changing the grain silently	Totals increase unexpectedly	Check duplicate join keys and parent repetition before changing chart formulas.
Model joins, calculations and filters without changing the grain silently	A calculation is empty	Inspect null/missing inputs, field type and divide-by-zero behavior.
Build a report with meaningful table, summary and chart blocks	A placeholder does not resolve	Check the saved dataset field binding and current authorized data.
Build a report with meaningful table, summary and chart blocks	The preview differs from the canvas	Inspect the saved revision, run/current-data context and pagination rather than treating the sample canvas as final output.
Review a saved report and run its published version	Approval is missing	Check reviewer permission, subject independence, current state and preview freshness.

Procedure	Observed problem	Recovery
Review a saved report and run its published version	A run fails despite publication	Inspect data authorization and output worker/producer status; publication alone does not guarantee current execution succeeds.
Compose a dashboard and schedule controlled report/visual versions	A tile cannot execute	Resolve that report/dataset's current authority or version availability.
Compose a dashboard and schedule controlled report/visual versions	A new report version should appear	Adopt it through dashboard/job revision and governance; do not silently change pinned dependencies.

CHAPTER 33

Close the demonstration and hand over the operating guide

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

Procedure	Evidence the audience should have seen
Register a bounded source connection and discover fields	Show connection revision, private reference type, READY discovery and published contract.
Define the source and publish a selected dataset	Show connection → named source → dataset as three distinct controlled records.
Model joins, calculations and filters without changing the grain silently	Show join kind, preview cardinality and one calculation with its expected values.
Build a report with meaningful table, summary and chart blocks	Show count 3, amount 2000, status breakdown and readable saved output.
Review a saved report and run its published version	Show latest versus published version, the independent decision and an actual run output.
Compose a dashboard and schedule controlled report/visual versions	Show dashboard publication, pinned report tiles, job preview and the resulting producer references.

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.