Kernel R1 • UAT handover •

Release and Support Runbook

Evidence-based handover of the implemented Kernel scope. Business acceptance and release signatures remain open.

Open complete handover

1. Handover purpose and current decision

This package hands the implemented Kernel scope to the UAT team for structured execution. It combines module walkthroughs, end-user procedures, source-backed implementation scope, cross-module ownership, editable test records and existing engineering evidence.

> **Handover state: prepared for UAT intake. UAT acceptance: not granted.** Confirm the target environment and entry gates before execution. Known access/configuration/provider dependencies are listed with owners and closure criteria. No new R1 business cases have been executed by producing these documents.

“R1” is the logical handover baseline requested for this package. The application was delivered through multiple recorded component releases. This document does not invent a single new application build or deployment tagged R1. The release owner must confirm the active UI, APIs, workers, database migrations and published configuration as one frozen UAT baseline.

The scope is Kernel only, including MEDES. The reader scope contains only Kernel module procedures. Integrum, full Nexus and PGATE remain labelled architecture references; only the implemented bounded Nexus connection/source-refresh capability is included in the Studio/Scheduler paths.

5. Existing evidence and what it establishes

The latest retained production screen report is dated **2026-10-19T22:58:35.010392+00:00**. It records **306 unique actual-user screens passing** within a rendered-menu union of 307, and 394 passing profile/screen checks with 1 failed check. These are different denominators. They are not percentages of completed business UAT.

The remaining failed screen is Security Dashboard: the recorded configuration guard required publication of a reviewed security page. MEDES access inspection separately found no relevant grants in the inspected profiles. Later configuration changes have not been re-queried during packaging.

Earlier native and fixture tests cover presentation, authorization boundaries, migrations, worker behavior and selected business paths. Their scope is retained in the evidence register. Documentation verification covers file rendering, links and downloads only. New UAT cases remain unexecuted.

ID / retained record	Boundary
E01 · Production screen-read and navigation acceptance	Authenticated production reads and available record navigation, 19 October 2026. Retains known gaps; not full mutation/approval acceptance.
E02 · Record review and presentation acceptance	Isolated fixtures and native test profiles; both themes, controls and originating-record reviews.
E03 · MEDES production profile coverage	Read-only production catalog inspection; inspected profiles had zero MEDES permissions/menus.
E04 · Dynamic menu provenance	Saved navigation provenance inspection; does not establish all role/ABAC permutations.
E05 · Studio deployment receipt	18 October Studio-only deployment, including preview/connection workers; Scheduler excluded from this older release.
E06 · Studio deployment verification	Historical deployment/public boundary checks; later read checks are in E01.
E07 · Scheduler and lifecycle deployment receipt	19 October Scheduler release, worker heartbeat and native profile checks; not human production business acceptance.
E08 · Scheduler migration and native acceptance	Rehearsal, rollback, service identity, native/browser tests and lifecycle columns; evidence boundary retained.
E09 · Scheduler implementation and remaining scope	Deployed implemented subset with explicit remaining roadmap. Older queue summaries may predate deployment.
E10 · MEDES technical completion and activation limit	14 October technical delivery; activation and live business acceptance were explicitly incomplete. E03 is later access evidence.
E11 · Documentation verification	Offline documentation links/rendering/downloads only. No application business tests.
E12 · IAM historical migration exceptions	Historical legacy classifications/audit data and specialist-permission exceptions; recheck before treating counts as current.
E13 · Axis implementation and review dependencies	Historical delivery and mapping-review/tenant-field limits; later read evidence in E01.
E14 · TimeVault workspace delivery	Historical Country/State UI and authenticated query evidence with later-flow-repair reference.
E15 · Regulix connected HTTP acceptance	Isolated native acceptance; later production navigation in E01.
E16 · Custodia reference implementation	Historical batch capture, dashboard, document tab delivery and evidence boundaries.
E17 · Nexora implementation and provider dependencies	Historical core integration delivery with explicit provider and remaining reference gaps.
E18 · Studio implementation acceptance	Mixed historical implementation ledger. Deployment state must be read with E05/E07 and later E01, not stale priority text.

ID / retained record	Boundary
E19 · Qbox fonts and icons evidence	Saved production font/icon inspection. Not a fresh screenshot run.
E20 · MEDES parked activation decision	Parked native approvals, provider activation and dependent business acceptance. No approval waiver.
E21 · Application source-route inventory	484 source routes and 32 native IAM screens; route existence is not availability or business acceptance.

8. Known gaps, parked work and exclusions

The following are carried forward from dated source records and the established scope. They are not all software defects: some are owner approvals, data/provider setup, roadmap scope or unexecuted acceptance. Assign named owners and dispositions before UAT begins.

ID / category	Scope and impact	Disposition	Owner and closure
R1-G01 · Configuration gate	IAM / Axis Security Dashboard: Security Dashboard cannot be used until a reviewed experience is published.	Open at latest saved inspection	Axis owner and independent reviewer. Approved current security-page mapping/version and successful permitted/denied UAT. Evidence: E01
R1-G02 · Access gate	MEDES: Inspected profiles cannot begin MEDES business UAT.	Open at latest saved inspection	IAM access owner and independent checker. Approved MEDES role/profile/menu/control chain, user assignments and allow/deny browser evidence. Evidence: E03; E10; E20
R1-G03 · Owner configuration gate	MEDES integrations: Native owner publications and business-role journeys cannot be assumed live.	Parked dependency	MEDES and platform owner reviewers. Current approved configuration/publication references for each of the seven platform handoffs. Evidence: E10; E20
R1-G04 · Provider activation	Pulse / MEDES fax and print-mail: Live fax/print-mail delivery is not accepted.	Parked by user	Provider administrator and business owner. Secret references configured, approved sender/recipient and actual provider/delivery receipts for controlled destinations. Evidence: E20
R1-G05 · Acceptance gap	All modules: Historical screen reads do not establish all create/edit/deactivate/review/execute journeys.	Open	UAT lead and module business owners. Completed R1 cases and applicable screen/control checklist with evidence, defect disposition and sign-off. Evidence: E01; E02
R1-G06 · Record setup	Vista / Pulse preview: Missing row bindings or denied datasets prevent the affected preview.	Record-dependent gate	Content maker and data owner. Exact saved version, authorized current row, successful preview and fresh review acknowledgement. Evidence: E01
R1-G07 · Roadmap	Scheduler connectors and operations: Arbitrary protocols and business operations cannot be enabled by entering a name.	Outside implemented R1 subset	Integration product owner. Supported adapter and registered typed contract, independent governance and execution/deny evidence. Evidence: E09
R1-G08 · Roadmap	Scheduler orchestration: Conditional fanout, automatic batch triggers and broader EOD/control totals are not accepted features.	Outside implemented R1 subset	Scheduler product owner. Approved extension scope and implementation/acceptance evidence. Evidence: E09

ID / category	Scope and impact	Disposition	Owner and closure
R1-G09 · Roadmap	Scheduler → Pulse / Vista operations: Actionable operational alerts and dedicated Vista operations datasets remain listed extensions.	Open extension	Scheduler, Pulse and Vista owners. Registered event/data contracts, configured authorized targets and end-to-end success/failure evidence. Evidence: E09
R1-G10 · Provider / feature gap	Nexora: Mentor, automatic live classes, isolated SCORM hosting, outbound events and signature/QR credential flow have stated limits.	Recorded dependencies; current recheck needed	Learning owner and integration administrator. Configured provider contracts and accepted relevant learner/author/reviewer journeys. Evidence: E17
R1-G11 · Availability gap	Atlas: Historical captures do not prove the current workspace can be used.	Current portal not verified	Atlas owner. Confirmed environment/access and executed document/link/export UAT. Evidence: E11
R1-G12 · Source-data exception	IAM historical records: Legacy classification/effective-start/audit values and specialist provider links cannot be fabricated.	Historical open items; recheck required	IAM data owner. Authoritative reconciliation or signed exception against the current records. Historical counts are in E12. Evidence: E12
R1-G13 · Governance dependency	Axis mappings: Unpublished mappings are not eligible for unrestricted rollout. Tenant-defined database fields remain parked.	Scope-specific review remains required	Axis designated owner and reviewer. Exact accepted mapping versions and governed publications for the agreed R1 screens. Evidence: E13; E01
R1-G14 · Release baseline gate	R1 target environment: Historical component receipts do not uniquely identify the current combined R1 installation.	To confirm at UAT entry	Release owner / operations. Signed environment record with current UI, APIs, workers, migration and configuration versions. Evidence: E05; E07; E01
R1-G15 · Operational acceptance	Recovery and nonfunctional targets: Business load, recovery targets and supported environment matrix require owner acceptance.	Not signed off	Operations and UAT lead. Agreed targets, controlled rehearsal results and operational sign-off for this exact baseline. Evidence: E13; E08
R1-G16 · Specification boundary	Integrum / full Nexus / PGATE: Full specification catalogs are not added as implemented operating modules. Bounded Nexus HTTPS/source refresh remains included.	Reference only	Architecture / release owner. Future release scope with implementation and operational acceptance evidence. Evidence: E11; E09

10. Operations, support and safe recovery

Symptom	First checks	Owner / next step
Missing menu or screen denied	Selected tenant/domain/profile, active/effective assignment, role/permission/menu and IAM→Axis bridges, module entitlement.	IAM and owner configuration; preserve denial/correlation.
Screen opens but action absent	Record state/revision, control permission, review independence and record-specific eligibility.	Owning module plus IAM/Axis; do not bypass review.
Preview fails or stale content	Saved artifact version, published dataset, authorized row key/fields, current source and preview worker.	Vista/Pulse/data owner; refresh preview after a content change.
Job queued or worker unavailable	Published job, queue/calendar window, Run as authority, current heartbeat/lease and dispatch result.	Scheduler operator; distinguish queued, accepted, running and completed.
Uncertain execution result	Owner receipt/output reference and idempotency key before dispatching again.	Scheduler and producer owner; cancellation may not reverse accepted external work.

Symptom	First checks	Owner / next step
Generated email/letter not delivered	Generation receipt versus channel/mode/recipient/provider attempts and final status.	Pulse/provider administrator; no claim of delivery from local capture.
MEDES menu absent	Approved MEDES role/profile and menu/control grants plus owner configuration.	IAM/MEDES; current recorded gate is R1-G02.
Document not available	Admission/scanning/classification, processing/version, custody permission and retention/hold state.	Custodia; quarantined bytes are not approved business evidence.
Tenant activation blocked	Fresh identity, commercial, configuration, placement/residency/support and entitlement evidence.	Failed owner step; registration progress is not activation authority.
Slow workflow response	Request correlation, server error/status, current deployment, task/definition identity and supported timeout behavior.	Regulix/runtime owner; inspect receipt before repeating a mutation.

Release and rollback boundary

Before UAT freeze, the release owner reconciles the historical receipts with the active installation and signs the environment record. If a correction is needed, build a bounded candidate, rehearse exact migrations/configuration and rollback in isolation, obtain required release authorization, deploy the reviewed artifact, verify health plus affected authenticated journeys and issue a new UAT baseline. This package itself deploys nothing.

Rollback must use the matching component receipt, verified backup and change-specific procedure. A UI rollback does not roll back database/configuration changes. A database restore or job cancellation does not undo a provider’s accepted delivery. Stop new dispatch as authorized, record in-flight work, reconcile owner outcomes and then follow the approved recovery sequence. Keep immutable attempts and audit history.

Complete the support roster in Environment. Route identity/access failures to IAM, presentation metadata to Axis, tenant facts to Tenant/TCP, data connections to the data/integration owner, content/output to Vista/Pulse, execution to Scheduler, and business case decisions to MEDES/Regulix. Escalation contacts and service targets must be assigned; no names or SLAs are invented here.

Deployment, gateway and regression handover — Revision 2

The deployment pipeline is the implemented operator-driven Azure release process. These annexes document its scripts, stages, artifacts, migrations, service activation, verification and rollback, together with Kong and recorded regression results.

- Azure deployment pipeline · PDF

- Kong and gateway operations · PDF
- Regression suites and recorded results · PDF

Integrated Pre-UAT release

How to read the status: implementation delivery, engineering regression and client acceptance are separate milestones. The engineering results below describe work already tested. The editable client case results begin *Awaiting client validation* because this handover starts the client Pre-UAT phase.

Security testing and user-experience refinements continue during Pre-UAT. The final UAT decision will include closure or explicit acceptance of the relevant findings and the agreed review outcomes.

Delivered scope, current checks and client review plan · Feature register