

Regulix — End-user Guide

Model a document-review decision, publish a simple review process, start one native instance, complete assigned work and trace an event or SLA exception to its owning configuration.

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

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Operating journey and preparation

Model a document-review decision, publish a simple review process, start one native instance, complete assigned work and trace an event or SLA exception to its owning configuration.

Worked example and preparation

Use a training process named Evidence Review and typed inputs such as evidenceComplete (boolean) and amount (number). Retain actual returned definition, hash, instance and task references; example names are not preinstalled artifacts.

Worked decision truth table

Model the following mutually exclusive business outcomes with the offered rule editor. Use typed booleans and numbers. These are example rules to author in the training definition, not built-in runtime outcomes.

evidenceComplete	amount	Expected example outcome
false	Any valid amount	REQUEST_INFORMATION
true	1000 or less	STANDARD_REVIEW
true	More than 1000	ENHANCED_REVIEW

Test true/999, true/1000, true/1001 and false/1001. Also omit a required input to show schema rejection. The business key identifies the training case; the native instance ID identifies the process that evaluates it.

Responsibilities

Role	Responsibility
Definition author / reviewer	Authors, validates and independently reviews rules, processes or cases.
Runtime starter	Starts an approved definition with authorized business input.
Assigned worker / delegate	Acts on the task permitted by current assignment.
Operations owner	Investigates events, incidents and runtime audit.

Terms used in this module

Term	Meaning
Definition	The versioned model from which instances run.
Native instance	The canonical process/case execution identity.
Business key	A business correlation value, distinct from the instance ID.

Term	Meaning
Task assignment	Authority to act on a particular work item.
Decision log	Evidence of inputs, rules matched and decision outcome.

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

Choose the procedure for your business task

Business journey	Open the detailed steps
Typed decision and controlled definitions	Author a typed decision and test boundary inputs Build and govern a process with a human review task Define a case with plan items and milestones
Native execution and assigned work	Start one instance and interpret its runtime state Claim, delegate and complete only assigned work
Event, SLA and recovery investigation	Register an event and diagnose an instance waiting for it Configure SLA/calendar policy and inspect an incident Trace decisions, deployment and runtime recovery

CHAPTER 3

Author a typed decision and test boundary inputs

Open	Who acts
Regulix → Rule Design; DMN Library; Rule Definitions	Rule author and independent reviewer

Make decision conditions, output types and hit policy explicit before a process depends on the rule.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Artifact name / kind	Training Evidence Decision; select the supported decision style	DMN/ruleset, scorecard and chain have different evaluation behavior.
Typed inputs	evidenceComplete as boolean; amount as number	The value true is different from a loosely typed text label.
Conditions / outputs	Explicit complete/incomplete branches and a named outcome	Define the unmatched case as well as the expected match.
Hit policy	An offered policy consistent with the model	Determines how multiple matching rules are resolved.

Field	Value or selection	Meaning and effect
Validity / policy set	Use the intended offered period and optional binding	Publication and consumer adoption still require their own authority.

Procedure and expected result

Step	Action	Expected visible result
1	Open Rule Design and select the required supported definition family.	The editor exposes the appropriate model and test inputs.
2	Declare typed inputs, conditions and outputs.	The model expresses the complete decision contract.
3	Validate and test a normal complete case.	The expected rule and output appear in the evaluation result.
4	Test false/missing evidence and the amount boundary on both sides.	The result distinguishes expected rejection, no match and invalid input.
5	Save and submit the exact artifact through the offered governance action.	The reviewer can inspect the tested saved version.
6	After review/publication, inspect Rule Definitions and retain its version/hash.	Consumers can select the exact controlled artifact.

When the result differs

Observation	Next action
No rule matches	Inspect the typed inputs and modeled fallback; do not assume a successful request means a positive business decision.
Several rules match unexpectedly	Review overlap and hit policy before publication.

Completion check

Show a match, a boundary/no-match case, the selected hit policy and the published version.

Continue

Bind the approved artifact in the intended process/case through that definition's review.

CHAPTER 4

Build and govern a process with a human review task

Open	Who acts
Regulix → BPMN Design → Process Definitions	Process author and reviewer

Model an executable sequence whose task, decisions and completion conditions are understandable before starting an instance.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Process name	Evidence Review with a unique training suffix	The returned definition reference, not the name, identifies the published version.
Activity / stage name	Review Evidence	A business label describing the work performed.
Sequence and gateway conditions	Start → review work → decision → end	Every intended path needs a valid continuation.
Assignment / rule references	Eligible saved policies and exact reviewed decisions	A typed role label is not a grant or task assignment.
Definition version / hash	The returned controlled identity	Running instances retain their definition context.

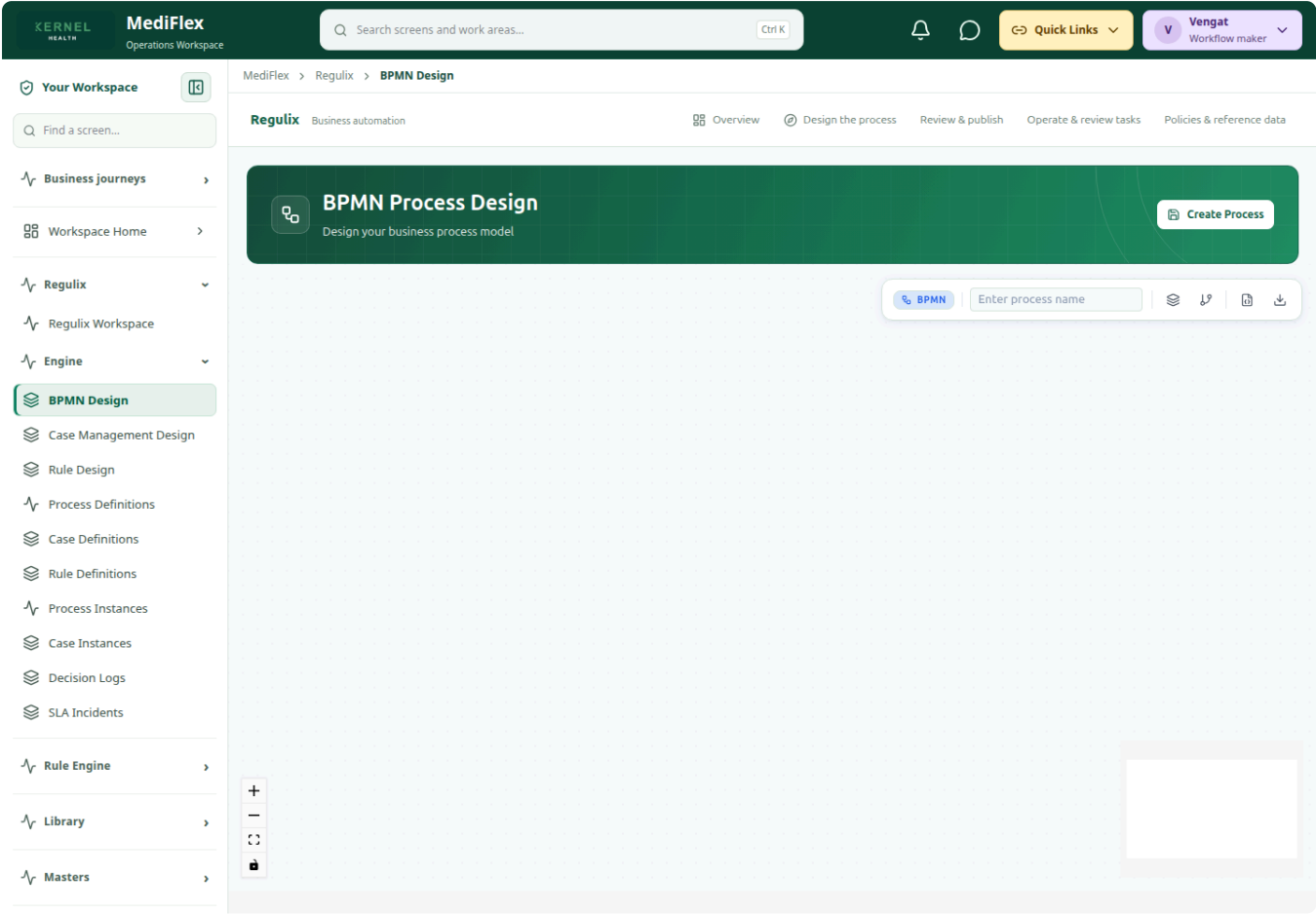
Procedure and expected result

Step	Action	Expected visible result
1	Open BPMN Design and enter the process name.	The design is identifiable before publication.
2	Add the required start, human work and completion path using the supported canvas controls.	The main sequence can be followed from beginning to end.
3	Configure the activity and any gateway/rule/assignment references.	Required inputs and branch behavior are explicit.
4	Validate/preview the saved design and inspect all reported errors.	Disconnected or invalid paths are resolved before submission.
5	Submit the exact model and complete the eligible review.	The reviewed definition is attributable.
6	Open Process Definitions and inspect the eligible published definition.	The runtime start action refers to the intended version.

SCREEN 1

BPMN Process Design: process name, design canvas and definition entry points

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



When the result differs

Observation	Next action
Validation reports an unresolved reference	Select an eligible saved dependency rather than replacing its ID with a label.
A later rule changes	Review and adopt that rule version in the process; do not assume existing definitions silently follow it.

Completion check

Show the complete path, task settings, validation outcome and exact definition version.

Continue

Start a single training instance and record its native reference.

Define a case with plan items and milestones

Open	Who acts
Regulix → CMMN Design → Case Definitions	Case author and reviewer

Use a case when work is organized around conditions and milestones rather than only a fixed sequence.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Case name	Training Evidence Case	Identifies the design; execution uses its native definition reference.
Plan item name	Review Documents	Describes a permitted piece of case work.
Milestone name	Evidence Confirmed	A milestone records a condition achieved; it is not an unassigned user task.
Entry/completion conditions	The offered typed model conditions	Explain when an item becomes available and when it is satisfied.
Pinned dependencies	Approved rules, assignment or policy references	The case must use controlled versions.

Procedure and expected result

Step	Action	Expected visible result
1	Create the named case in CMMN Design.	The case canvas and definition identity are available.
2	Add the required stage/plan item and milestone.	The case structure reflects the business outcome.
3	Configure the supported entry, exit and completion conditions.	The availability of work can be explained.
4	Save and validate the exact design.	Model/reference errors are resolved.
5	Complete the offered review/publication and inspect Case Definitions.	The eligible version can be selected for execution.

When the result differs

Observation	Next action
The milestone never becomes satisfied	Inspect its actual conditions and recorded case data.

Observation	Next action
A plan item is not available	Check its entry criteria and current case state before attempting a runtime command.

Completion check

Show plan item, milestone, conditions and the published case reference.

Continue

Start the reviewed Case Definition and inspect its native Case Instance timeline.

CHAPTER 6

Start one instance and interpret its runtime state

Open	Who acts
Regulix → Process Definitions / Case Definitions → Start; Instances / Case Instances	Authorized runtime starter

Create an execution against an approved definition and correlate it with the business record without confusing the two identities.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Definition reference/version	The reviewed training process or case	Do not start a draft copy with the same name.
Business key	The training evidence/case reference	Useful for correlation, not a replacement for native instance ID.
Variables / start input	Values matching the declared schema	Wrong types and missing required data should be corrected at input.
Request / instance reference	The server-returned identities	Retain them before any retry or follow-up command.

Procedure and expected result

Step	Action	Expected visible result
1	Open the eligible definition and inspect its current version.	The intended model is selected.

Step	Action	Expected visible result
2	Enter valid typed start input and business correlation.	Inputs agree with the definition contract.
3	Start once and record the returned native instance ID.	A distinct runtime execution is created.
4	Locate it in Instances or Case Instances.	Status, definition and business key agree with the start result.
5	Open progress, variables, work and history.	The next available task or waiting condition is visible.
6	Compare the current version before any runtime update.	Subsequent commands use the latest concurrency baseline.

When the result differs

Observation	Next action
The response is lost	Search by business correlation and inspect persisted execution before starting again.
The instance is waiting	Identify the specific task/event/condition; waiting is not automatically a failed engine.

Completion check

Show definition ID, business key, native instance ID, current state and next work.

Continue

Open the assigned task through its owning business record or Work Queue where that module uses it.

CHAPTER 7

Claim, delegate and complete only assigned work

Open	Who acts
Regulix → Work Queue; Assignment Policies; Assignment Delegation; owning business record	Assigned worker, eligible delegate or assignment administrator

Task visibility, claim and completion authority are separate. The business owner may additionally require independent review.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Task / native instance	The selected current work item	Keep task identity distinct from business record and process definition.
Assignment policy	The eligible policy selecting a worker/team	A policy reference does not itself grant IAM access.
Delegate / period / reason	The permitted alternate subject and bounded period	Delegation must be active and within the offered scope.
Completion input / expected version	The required decision data and current revision	Completing a stale task must not overwrite newer work.

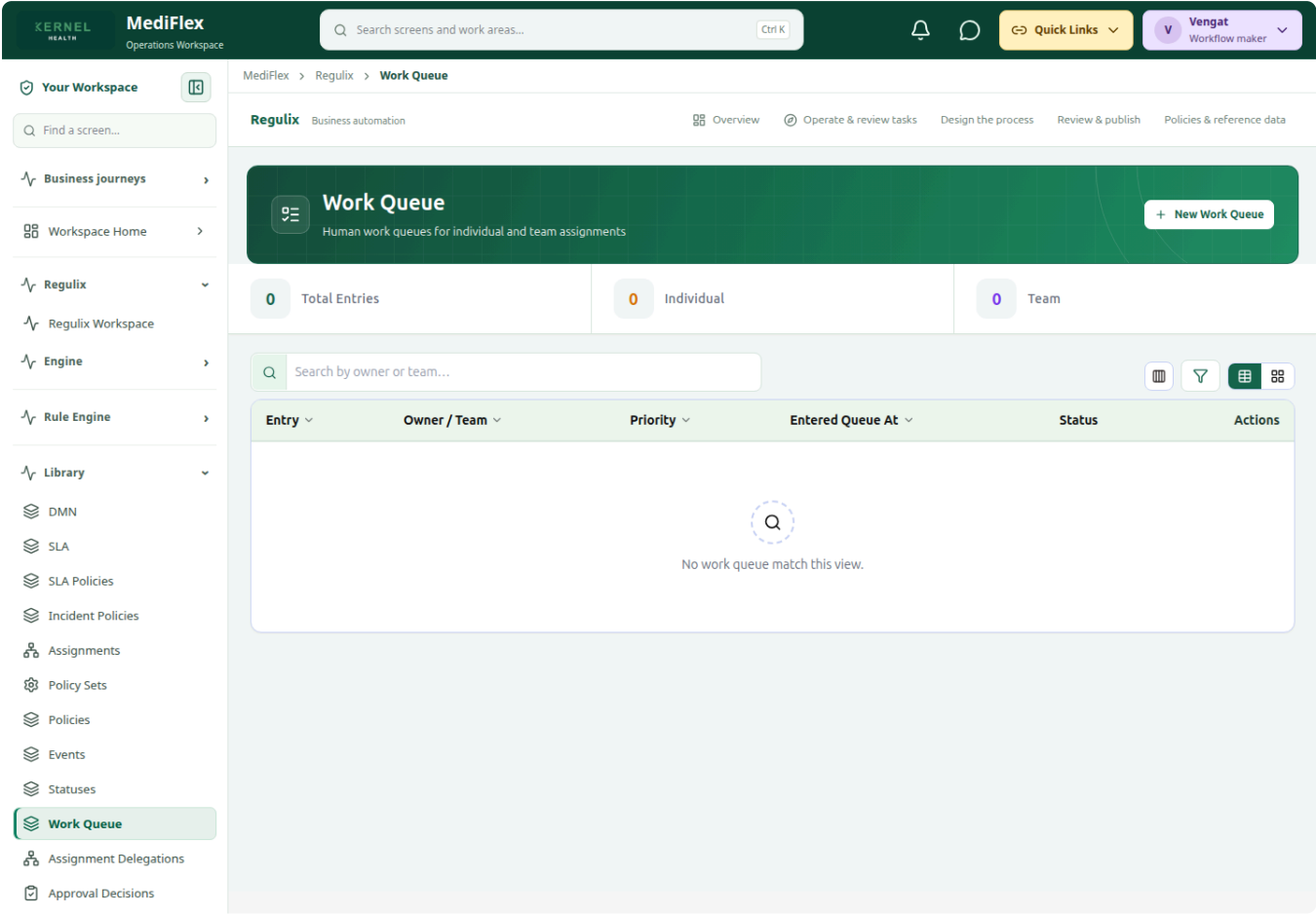
Procedure and expected result

Step	Action	Expected visible result
1	Open the current work item and inspect assignee/team and state.	Your authority to act can be distinguished from row visibility.
2	Use the offered claim or assignment action only when eligible.	The task records the current worker.
3	Where delegation is needed, create the permitted bounded delegation and inspect its effective state.	The delegate can be attributed to a specific authority.
4	Complete required business input on the owning record or task form.	The intended outcome is explicit.
5	Submit completion once and read back task and instance state.	The workflow advances and the owner records its outcome.
6	Inspect audit for assignment, delegate and decision.	The submitting and reviewing subjects remain distinguishable.

SCREEN 2

Work Queue: owner/team search and permitted row actions; this retained view has no assigned entries

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



When the result differs

Observation	Next action
Approve/complete is missing	Check assignment, current state, action permission and subject independence.
Another worker completed the item	Reload the current task and outcome instead of replaying the stale completion.

Completion check

Show task assignment, current decision and the resulting business record.

Continue

Return to the originating business record to verify the applied result, not just workflow completion.

Register an event and diagnose an instance waiting for it

Open	Who acts
Regulix → Event Registry; Event Types / Event Defs; instance runtime	Event/configuration owner and runtime operator

Correlate an authorized event with the correct waiting execution and its declared payload contract.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Event type / definition	The offered registered event contract	A descriptive name alone is not a valid event payload.
Business correlation	The same business key/reference expected by the consumer	Prevents signaling an unrelated case.
Payload	Typed fields required by the registered contract	Avoid omitted required values or text in numeric/boolean fields.
Native instance / current version	The intended waiting execution	Use the current runtime identity for contextual commands.

Procedure and expected result

Step	Action	Expected visible result
1	Inspect the waiting instance and the specific expected event/condition.	The blocked boundary is known.
2	Open the registered event contract and compare required payload and correlation.	The intended delivery can be validated.
3	Use the supported authorized event/signal action with the matching context.	The runtime records acceptance or a specific rejection.
4	Reopen the instance timeline and variables.	Only the intended waiting work advances.
5	Inspect runtime audit and any event/error record.	Delivery and consumption can be distinguished.

SCREEN 3

Event Types: active and inactive reference records

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

Kernel Health

MediFlex

Operations Workspace

Search screens and work areas...

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Event Types

Activity Types

Loop Characteristics

Gateway Types

Merge Strategies

Event Definitions

Action Types

Artifact Types

Artifact Statuses

Hit Policies

Feedback

MediFlex > Regulix > Event Types

Regulix Business automation

Overview Policies & reference data Design the process Review & publish Operate & review tasks

BPMN Event Types

BPMN Event Types for process modeling and execution

New BPMN Event Type

2 Total Event Types

1 Active

1 Inactive

Search event types by name or code...

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Name	Event Code	Status	Actions
Message event	MESSAGE	ACTIVE	⋮
Retired event	RETIRED	INACTIVE	⋮

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When the result differs

Observation	Next action
The event is accepted but work remains waiting	Inspect correlation, consumer state and entry condition rather than resending blindly.
The payload is invalid	Correct its contract values before another attempt.

Completion check

Show the expected event contract, submitted correlation and observed timeline change.

Continue

Investigate assignment or SLA conditions if the instance is still waiting.

CHAPTER 9

Configure SLA/calendar policy and inspect an incident

Open	Who acts
Regulix → SLA Library; SLA Policy Master; SLA Incident Policy; Incident Log	SLA author/reviewer and runtime operator

Separate a timing definition from its incident behavior and the runtime evidence that the policy was applied.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
SLA policy	The eligible timing policy for the activity	Bind it deliberately to the intended definition/activity.
Business calendar / time zone	The offered working calendar and timing zone	Working time can differ from elapsed wall-clock time.
Incident policy	The offered escalation/remediation behavior	An incident policy does not by itself send an unconfigured external message.
Due/incident references	The current runtime obligation and incident	Retain the exact affected instance/task and policy version.

Procedure and expected result

Step	Action	Expected visible result
1	Inspect the calendar and SLA policy intended for the training activity.	Working days, exclusions and timing scope are understood.
2	Author/review the supported timing and incident configuration.	Controlled versions are available for binding.
3	Bind the eligible policy to the intended process/case activity and govern that definition.	The runtime dependency is explicit.
4	Use the isolated SLA test facility where offered to inspect due-date calculations.	Expected working-time behavior can be compared without a business escalation.
5	Inspect a training runtime obligation and its Incident Log entry when an incident exists.	The task, deadline and incident are linked.
6	Follow the permitted owner action and read back the incident/runtime state.	Recovery is attributable rather than a silent record edit.

When the result differs

Observation	Next action
The deadline differs from expectation	Compare zone, working calendar, exclusions, start time and pinned policy.
There is no incident	Confirm the obligation is due and the policy is actually bound; do not fabricate a breach for presentation.

Completion check

Show policy/calendar binding, due-date test and an actual incident only when available.

Continue

Use runtime audit to explain the timing calculation, incident and owner response.

CHAPTER 10

Trace decisions, deployment and runtime recovery

Open	Who acts
Regulix → Audit; Decision Log; Deploy Event Log; Artifact Graph	Auditor or runtime operator

Follow one execution from its controlled dependencies to its decision and outcome; use the first failed boundary to choose recovery.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Definition/hash	The executed model snapshot	Current authoring content may differ from what ran.
Decision inputs/output	The recorded evaluation values	Explain match/no-match and business rejection separately from technical errors.
Deployment event	The artifact deployment/availability result	A saved definition is not proof deployment succeeded.
Runtime correlation / expected version	The affected execution and current state	Support should use references rather than credentials or session data.

Procedure and expected result

Step	Action	Expected visible result
1	Open the training instance and record its definition, task and decision references.	The investigation has an exact scope.
2	Follow Decision Log to inspect typed inputs and rule outcome.	The business result can be explained from the executed artifact.
3	Inspect Deploy Event Log and Artifact Graph for dependent versions.	Missing or stale dependencies can be identified.
4	Inspect the runtime failure or waiting condition.	Technical failure, business rejection and pending work are distinguished.
5	Resolve the owning dependency and use only the runtime recovery action offered for the current state.	The new attempt/transition retains the original failure history.

When the result differs

Observation	Next action
Only the current design is being inspected	Return to the definition version/hash that the instance actually executed.
A workflow task is complete but business data is unchanged	Check the business owner's apply/result receipt and correlate it with workflow completion.

Completion check

Show one definition-to-instance-to-decision trail and the first failed/recovered boundary.

Continue

Retain the minimum necessary decision/run references in support or UAT evidence.

CHAPTER 11

Appendix · Screen and action directory

▼ Open the complete screen or declared-field reference

Use search or the authorized module menu first. Links open the named application route and retain IAM checks; record-specific actions may need selection context. Labels are refreshed from the available application route registry where a matching route exists. The earlier inventory supplies the remaining owner entries.

Screen / action	Area	Route/reference	Page permission reference
BPMN Design	Engine	regex:/engine/design/bpmn	Server-issued Regex access menu and operation policy
Rule Design	Engine	regex:/engine/design/rules	Server-issued Regex access menu and operation policy
CMMN Design	Engine	regex:/engine/design/cmmn	Server-issued Regex access menu and operation policy
Process Definitions	Engine	regex:/engine/Process/definitions	Server-issued Regex access menu and operation policy
Case Definitions	Engine	regex:/engine/Case/definitions	Server-issued Regex access menu and operation policy
Case Instances	Engine	regex:/engine/Case/instances	Server-issued Regex access menu and operation policy
Instances	Engine	regex:/engine/process/instances	Server-issued Regex access menu and operation policy
Audit	Engine	regex:/engine/runtime/audit	Server-issued Regex access menu and operation policy
Decision Log	Engine	regex:/engine/runtime/rules/decision-logs	Server-issued Regex access menu and operation policy
Incident Log	Engine	regex:/engine/runtime/sla-incidents	Server-issued Regex access menu and operation policy
Artifact Graph	Engine	regex:/engine/rules/graph	Server-issued Regex access menu and operation policy
Rule Definitions	Engine	regex:/engine/rules/definitions	Server-issued Regex access menu and operation policy
Deploy Event Log	Engine	regex:/engine/rules/deploy-log	Server-issued Regex access menu and operation policy
DMN Library	Library	regex:/library/decisions/dmn	Server-issued Regex access menu and operation policy
SLA Library	Library	regex:/library/policies/sla	Server-issued Regex access menu and operation policy
SLA Policy Master	Library	regex:/library/policies/sla-policies	Server-issued Regex access menu and operation policy
SLA Incident Policy	Library	regex:/library/policies/incident-policies	Server-issued Regex access menu and operation policy
Assignment Policies	Library	regex:/library/policies/assignments	Server-issued Regex access menu and operation policy
Event Registry	Library	regex:/library/events	Server-issued Regex access menu and operation policy

Screen / action	Area	Route/reference	Page permission reference
Policy Set Library	Library	regex:/library/policies/policy-sets	Server-issued Regex access menu and operation policy
Policy Set Library	Library	regex:/library/policies/policies	Server-issued Regex access menu and operation policy
Work Queue	Library	regex:/library/runtime/work-queue	Server-issued Regex access menu and operation policy
Assignment Delegation	Library	regex:/library/runtime/assignment-delegations	Server-issued Regex access menu and operation policy
Approval Decision	Library	regex:/library/runtime/approval-decisions	Server-issued Regex access menu and operation policy
Activity Status Registry	Library	regex:/library/definitions/statuses	Server-issued Regex access menu and operation policy
Activity Type	Master	regex:/masters/types/activityTypes	Server-issued Regex access menu and operation policy
Loop Characteristics	Master	regex:/masters/types/loopCharacteristics	Server-issued Regex access menu and operation policy
Gateway Type	Master	regex:/masters/types/gatewayTypes	Server-issued Regex access menu and operation policy
Merge Strategy	Master	regex:/masters/types/merge-strategies	Server-issued Regex access menu and operation policy
Event Types	Master	regex:/masters/types/events	Server-issued Regex access menu and operation policy
Event Defs	Master	regex:/masters/definitions/eventDefs	Server-issued Regex access menu and operation policy
Action Type	Master	regex:/masters/rules/actionTypes	Server-issued Regex access menu and operation policy
Artifact Status	Master	regex:/masters/rules/artifactStatuses	Server-issued Regex access menu and operation policy
Artifact Type	Master	regex:/masters/rules/artifactTypes	Server-issued Regex access menu and operation policy
Hit Policy	Master	regex:/masters/rules/hitPolicies	Server-issued Regex access menu and operation policy
Environment	Master	regex:/masters/rules/environments	Server-issued Regex access menu and operation policy
Calendar	Master	regex:/masters/calendar	Server-issued Regex access menu and operation policy

CHAPTER 12

Cross-module handoffs and the record references to retain

Next module	What to carry across	Open the related guide
IAM	Current identity, scope and operation permission constrain runtime commands.	IAM
TimeVault	Return the review outcome to the owning temporal change.	TimeVault
MEDES	Correlate assigned case work with its actual member/case record.	MEDES
Core	Bind the intended published state/reason contract.	Core

CHAPTER 13

Problem → responsible action → safe continuation

Procedure	Observed problem	Recovery
Author a typed decision and test boundary inputs	No rule matches	Inspect the typed inputs and modeled fallback; do not assume a successful request means a positive business decision.
Author a typed decision and test boundary inputs	Several rules match unexpectedly	Review overlap and hit policy before publication.
Build and govern a process with a human review task	Validation reports an unresolved reference	Select an eligible saved dependency rather than replacing its ID with a label.
Build and govern a process with a human review task	A later rule changes	Review and adopt that rule version in the process; do not assume existing definitions silently follow it.
Define a case with plan items and milestones	The milestone never becomes satisfied	Inspect its actual conditions and recorded case data.
Define a case with plan items and milestones	A plan item is not available	Check its entry criteria and current case state before attempting a runtime command.
Start one instance and interpret its runtime state	The response is lost	Search by business correlation and inspect persisted execution before starting again.
Start one instance and interpret its runtime state	The instance is waiting	Identify the specific task/event/condition; waiting is not automatically a failed engine.
Claim, delegate and complete only assigned work	Approve/complete is missing	Check assignment, current state, action permission and subject independence.

Procedure	Observed problem	Recovery
Claim, delegate and complete only assigned work	Another worker completed the item	Reload the current task and outcome instead of replaying the stale completion.
Register an event and diagnose an instance waiting for it	The event is accepted but work remains waiting	Inspect correlation, consumer state and entry condition rather than resending blindly.
Register an event and diagnose an instance waiting for it	The payload is invalid	Correct its contract values before another attempt.
Configure SLA/calendar policy and inspect an incident	The deadline differs from expectation	Compare zone, working calendar, exclusions, start time and pinned policy.
Configure SLA/calendar policy and inspect an incident	There is no incident	Confirm the obligation is due and the policy is actually bound; do not fabricate a breach for presentation.
Trace decisions, deployment and runtime recovery	Only the current design is being inspected	Return to the definition version/hash that the instance actually executed.
Trace decisions, deployment and runtime recovery	A workflow task is complete but business data is unchanged	Check the business owner's apply/result receipt and correlate it with workflow completion.