

PRODUCT WORKFLOW STUDY

From scattered daily checks to one operational command view

A dashboard workflow showing how Corexa can surface the machines, jobs, technicians, parts, customer actions and commercial exceptions that need attention today.

Evidence level stated clearly throughout

Repository-reviewed

Capability basis

Daily operations

Primary workflow

Connected record

Operating model

Pilot required

Outcome standard



THE CHALLENGE

Why the existing process breaks down

Service managers often begin the day by checking several calendars, messages, job lists, stock warnings and accounting queues. The work is not simply seeing data; it is identifying the small number of conditions that require action now.

01

Counts lack action

A dashboard shows totals without explaining which records are blocked, overdue or high risk.

02

Roles see the same noise

Technicians, administrators and managers need different priorities from the same operating system.

03

Status is stale

Users lose confidence when cards lag behind the underlying job or machine state.

04

Exceptions are hidden

Awaiting parts, uninvoiced completions and unread customer messages sit inside separate modules.

05

Drill-down is weak

A warning cannot be opened directly into the machine, job or workflow that created it.

06

Daily priorities are person-dependent

The business relies on one experienced administrator to remember what matters.

The central risk

A dashboard can create the appearance of visibility while still forcing the team to manually discover the day's real operational risks.

THE OPERATING MODEL

A connected workflow around the machine

Corexa can combine role-specific summary cards, exception counts and direct drill-down into the connected workflows requiring action.

1

Load trusted summary

Retrieve current machine, job, stock and commercial indicators.

2

Prioritise exceptions

Separate overdue, blocked, critical and unread work from routine activity.

3

Assign attention

Show the responsible role or user for each action.

4

Drill into source

Open the exact job, machine, message or transaction.

5

Confirm resolution

Update the source workflow and refresh the operational view.

COREXA CAPABILITY	OPERATIONAL CHANGE	WHY IT MATTERS
Role-aware dashboards	Presents information relevant to home, business, technician or corporate users.	Users begin with their actual responsibilities.
Machine health and alerts	Surfaces condition and maintenance risk.	Technical issues compete appropriately with job activity.
Job and calendar summaries	Shows open, scheduled, completed and blocked work.	The day's service load is visible.
Inventory and part alerts	Highlights shortages and unresolved part demand.	Potential job blockers can be addressed earlier.
Commercial queues	Shows quotes, invoices and readiness exceptions.	Completed work is less likely to stall before revenue.
Direct drill-down	Opens the connected source record.	The dashboard becomes an action surface rather than a report.

CREDIBILITY STANDARD

What is supported - and what is not yet claimed

A credible case study distinguishes repository evidence, real workflow scope and future outcome hypotheses. The evidence level below is deliberately explicit.

✓ Repository capability

The repository contains home, business, technician and corporate dashboards, health cards, job summaries, alerts, inventory widgets, quotes, invoices and direct navigation work.

✓ Connected operating model

The workflow is designed to keep daily operations connected to the relevant machine, customer, site, job and responsible user.

✓ Credible limitation

Dashboard accuracy depends on canonical data sources, refresh behaviour and permission resolution; visual polish does not guarantee trustworthy counts.

✓ Pilot requirement

A defined cohort should be measured from baseline through controlled use before any productivity, cost, revenue or satisfaction outcome is published.

Not yet claimed: this case study does not present a measured productivity, revenue, accuracy or customer-satisfaction improvement. A controlled baseline and participant-approved result are required before those claims are published.

Measurement plan for the publishable version

MEASURE	EVIDENCE SOURCE	CREDIBLE REPORTING
Summary reconciliation	Dashboard versus source queries	Percentage of displayed counts matching underlying records.
Time to first action	Session and workflow timestamps	Time from dashboard open to the first resolved priority item.
Unowned exception rate	Dashboard action audit	Priority items without an accountable user.
Drill-down success	Navigation test	Cards opening the intended source record without error.
State-state frequency	Refresh issue log	Instances requiring reload before current state appears.
Daily queue age	Open exception records	Age distribution of blocked jobs, unread messages and uninvoiced work.

"A useful dashboard does not show everything; it makes the next correct action obvious and traceable."

MAKE THE STORY TANGIBLE

Show the dashboard resolving one real operational exception

Begin with a priority card, drill into the affected record, complete the required action and return to a refreshed summary. This proves the dashboard is connected, not decorative.



Connected workflow

Representative view

Load trusted summary

Retrieve current machine, job, stock and commercial indicators.

Prioritise exceptions

Separate overdue, blocked, critical and unread work from routine activity.

Assign attention

Show the responsible role or user for each action.

Drill into source

Open the exact job, machine, message or transaction.

1. Role-specific daily dashboard

2. Priority exception card with count and context

3. Source workflow opened from the card

4. Updated dashboard after verified resolution

Recommended evidence-building sequence

Phase 1 - Baseline

Select a representative sample and record the current process, delays, errors and missing evidence.

Phase 2 - Controlled workflow

Apply one agreed Corexa process, ownership rule and completion standard for 8-12 weeks.

Phase 3 - Verified result

Report system-derived measures, dated screenshots and a participant-approved quotation.

Build the publishable proof layer

Replace representative views with dated interface screenshots, a defined baseline, system-derived measures and an approved participant quotation.

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Publication note: capability descriptions are based on the Corexa repository supplied in July 2026. Confirm the deployed workflow, permissions, integrations and data quality before presenting a capability as a completed customer outcome.