DENTALXPAND LEARNING CENTER / WORK HUB

Manage Client Instructions, Options, and Versions

A detailed guide to current per-client instruction records, instruction types and software labels, approved PDF upload, optional task-linked access, signed preview, version changes, archive behavior, tenant scope, troubleshooting, and verification.

VERSION	1.0	AUDIENCE	Client operations, RCM teams, and administrators
FORMAT	Website + PDF	UPDATED	July 2026

Every organization, practice, client, provider, patient, employee, task, instruction, type, software label, PDF, filename, version, path, URL, date, size, count, and status shown in this guide is fictional. Never put protected data, credentials, tokens, signed URLs, private exports, or another tenant's content into training material.

Contents

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How to use this guide

Read tenant scope, identity, client, page role, source, task audience, version, and retention discipline first. Then use the command center, options, PDF upload, task link, preview, update, archive, production-scope checks, troubleshooting, and completion verification.

01 / PURPOSE AND ACCESS

Use Client Instructions as a scoped operational reference, not a generic PDF share

Area	Current role	Boundary
Current instruction	One current record represents a client and instruction type; the baseline schema makes that pair unique.	A matching name does not prove another record is the right client, current source, or authorized scope.
Current PDF	The instruction points to a current file record, which the page can preview in an iframe using a signed Storage URL.	A current file, signed URL, preview, browser cache, or local copy is not a public share or broad access grant.
Version record	Initial creation stores version 1. A replacement PDF increments the record and adds a client_instruction_versions row.	A metadata-only change does not increment the version, and the current page does not render a visible history or restore UI.
Page controls	The page renders New, Edit, and Archive for admin or super-admin roles. View and Assign appear for visible rows.	Client controls alone never replace page, authenticated session, tenant, database, and Storage policy enforcement.
Task grant	A task link can create grants for the client, assignment, supervisor, and team members when fields exist.	A task is a precise operational audience, not a bulk sharing list or a substitute for policy.

Stop at unexpected data
If another client, organization, practice, provider, patient, employee, Guardian Connect workspace, or unrelated PDF appears, stop. Do not open, preview, download, forward, copy, screenshot, or test more access. Report minimum non-sensitive context through the approved incident process.

Open Client Instructions	Roles and access	Organization context
Open Client Instructions	**Roles and access**	**Organization context**

02 / COMMAND CENTER

Find the current non-archived instruction without turning search into data discovery

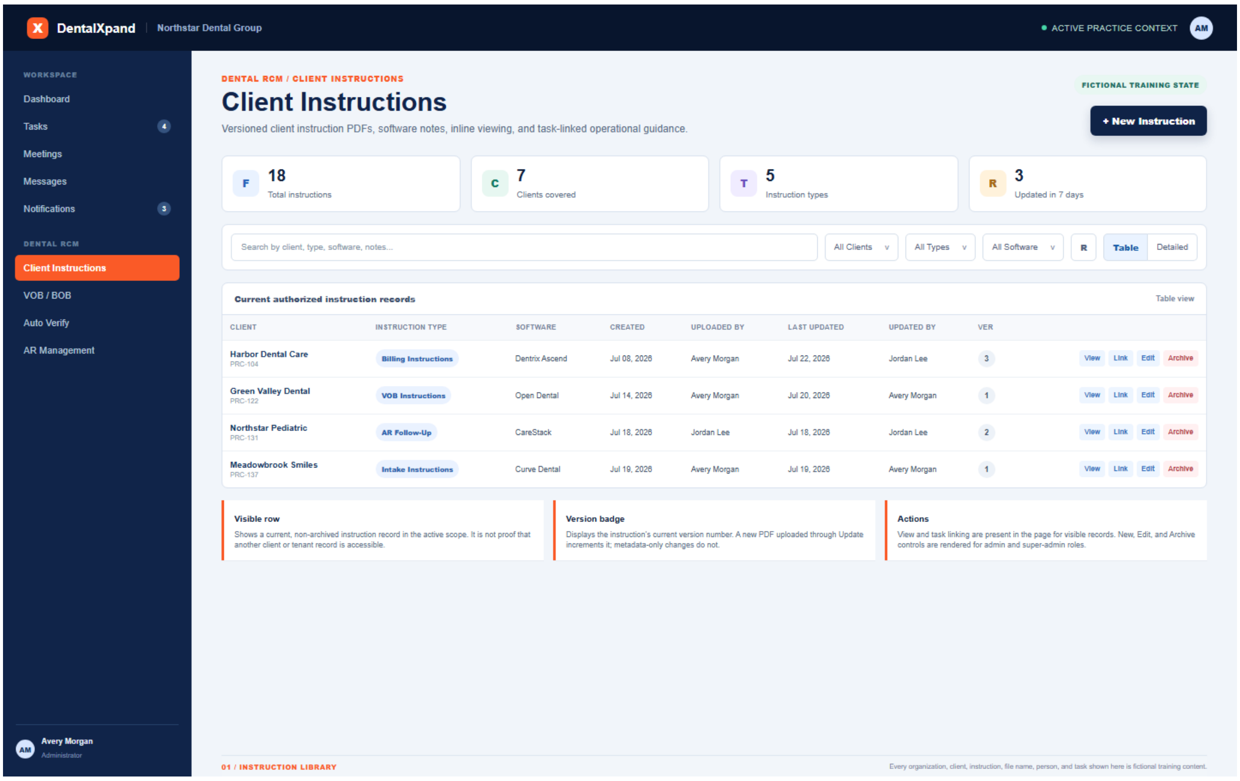

Figure 1. Fictional Client Instructions table with loaded totals, client/type/software filters, metadata, current version badges, and View, Link, Edit, and Archive actions.

1. Open the permitted Client Instructions route with your own approved account. Respect a denied route instead of using a copied URL or another person's session.
2. Treat totals, client coverage, type counts, and recent-update cards as current display summaries, not complete audit, retention, or compliance evidence.
3. Search checks currently loaded client name, instruction type, software, and notes. Use a known non-sensitive reference; never search as a way to discover unrelated protected data.
4. Filter by client, type, or software and choose Table or Detailed presentation. These controls change the visible set or presentation, not authorization, source status, or policy.
5. The list excludes archived records and orders current records by most recent update. Refresh after material work and verify the owner workflow.

> Current means current pointer, not a full historical browser
> The reviewed component displays only the current version badge. It does not call the version-history API or expose visible comparison, restore, prior-PDF, or archived-record controls.

03 / TYPES, SOFTWARE, AND NEW PDF

Use source-accurate options and create a single current record for the correct client/type

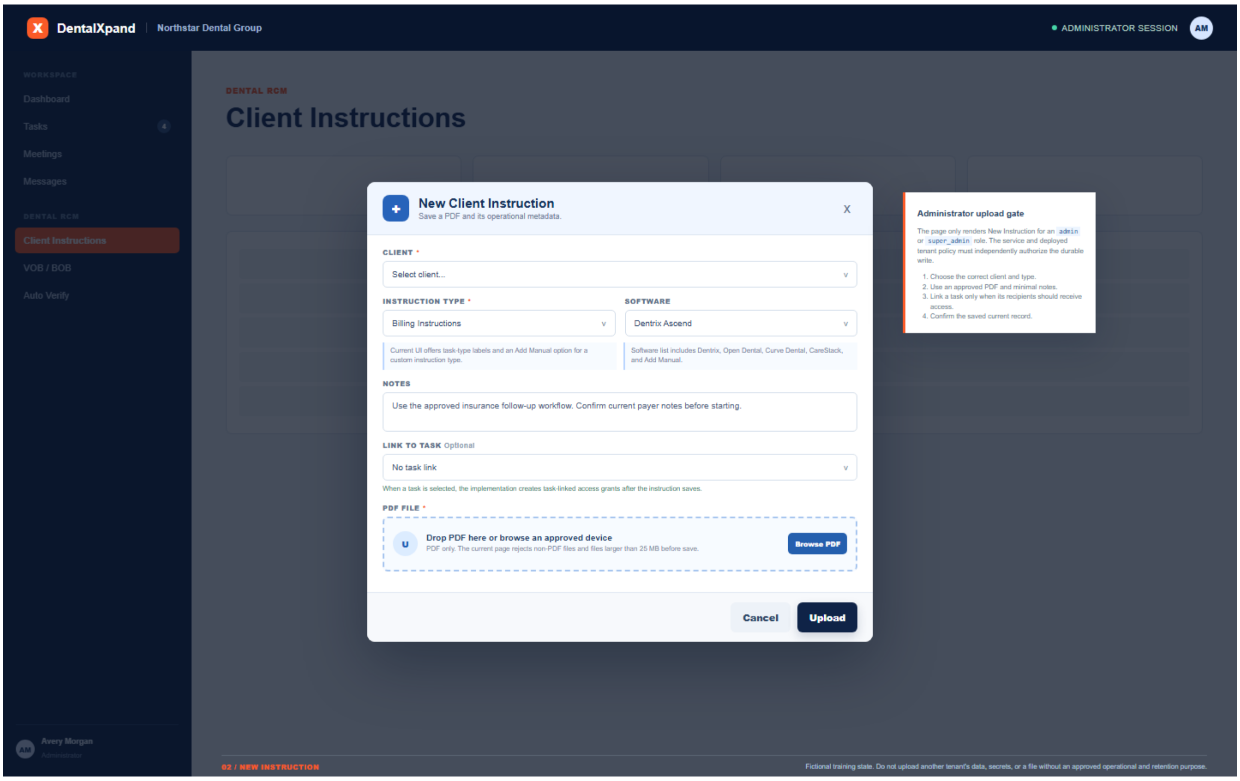

Figure 2. Fictional New Client Instruction form with client, instruction type, software, notes, optional task link, and PDF-only browser upload under the current 25 MB UI check.

Form area	Reviewed current behavior	Required discipline
Instruction type	The form uses TASK_TYPE_OPTIONS labels and an Add Manual choice, which requires custom text.	Use a distinct approved type. Do not invent near-duplicate values to bypass the unique client/type rule.
Software	The component has a local software list, plus Add Manual; it is not dynamically fed by the client_instruction_options API in the reviewed page.	Software signals operational context only. It is not proof of a PMS connection or permission to access client systems.
Client	Client and final type are required for new records. The form uses the same provider source as Tasks.	Confirm the exact intended provider/client and practice. Do not reuse a wrong record as a shortcut.
PDF	New records require a file. The browser rejects a non-PDF by MIME/extension checks and rejects files over 25 MB.	Validate source, purpose, tenant, retention, and approved handling. Browser validation is not a complete security control.
Save	The API uploads to files storage, saves a file record, creates version 1, then inserts the first version row.	Refresh and verify client, type, version, current source, and intended scope after save.

04 / TASK-LINKED ACCESS

Link only the smallest task audience whose work requires the current instruction

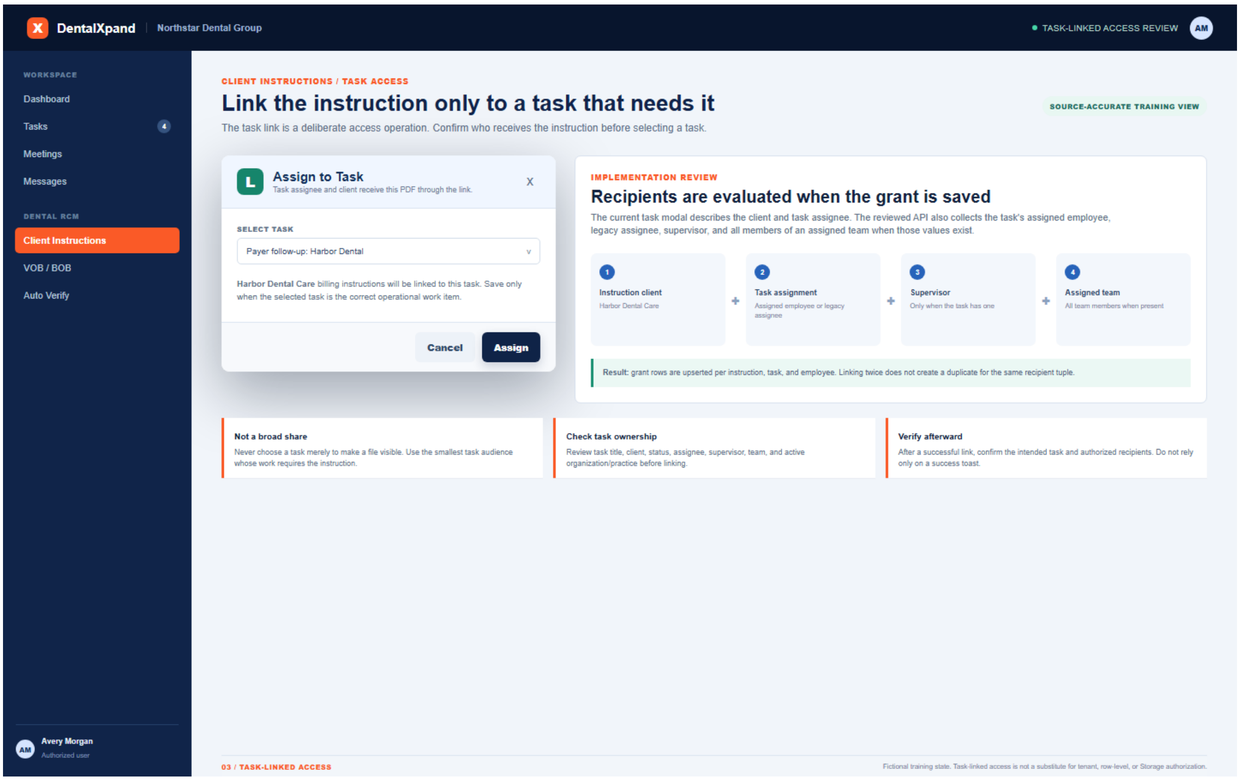

Figure 3. Fictional Assign to Task modal and source-reviewed recipient map for the instruction client, task assignment, supervisor, and assigned team members.

Step	Reviewed implementation	Boundary
Select task	New Instruction offers an optional task link. The separate Assign modal loads the current task list.	Check task title, client, status, assignment, supervisor, team, organization, and practice before selection. Do not assume a list is client-scoped.
Build recipients	The API creates a set from assigned_employee, assigned_to, supervisor_id, the instruction client, and assigned team members when present.	Do not choose a task merely to make a PDF visible. Task membership can broaden the audience beyond the person initially considered.
Save grant	Rows are upserted on instruction_id, task_id, and employee_id, so the same tuple is not duplicated.	A no-duplicate technical result does not prove the task audience, tenant, or business decision is correct.
Verify result	The UI shows a success count after assignment.	Confirm the intended task and authorized recipients. Do not treat a toast as a policy, tenant, or access audit.

Task links never bypass policy
The reviewed assignToTask client method does not use the same visible admin-or-manager guard as create, update, and archive. Treat task linking as a sensitive operational action that still requires correct deployed database, page, tenant, and Storage policy.

05 / SIGNED PREVIEW

Use the in-app preview as a time-limited authorized reading surface

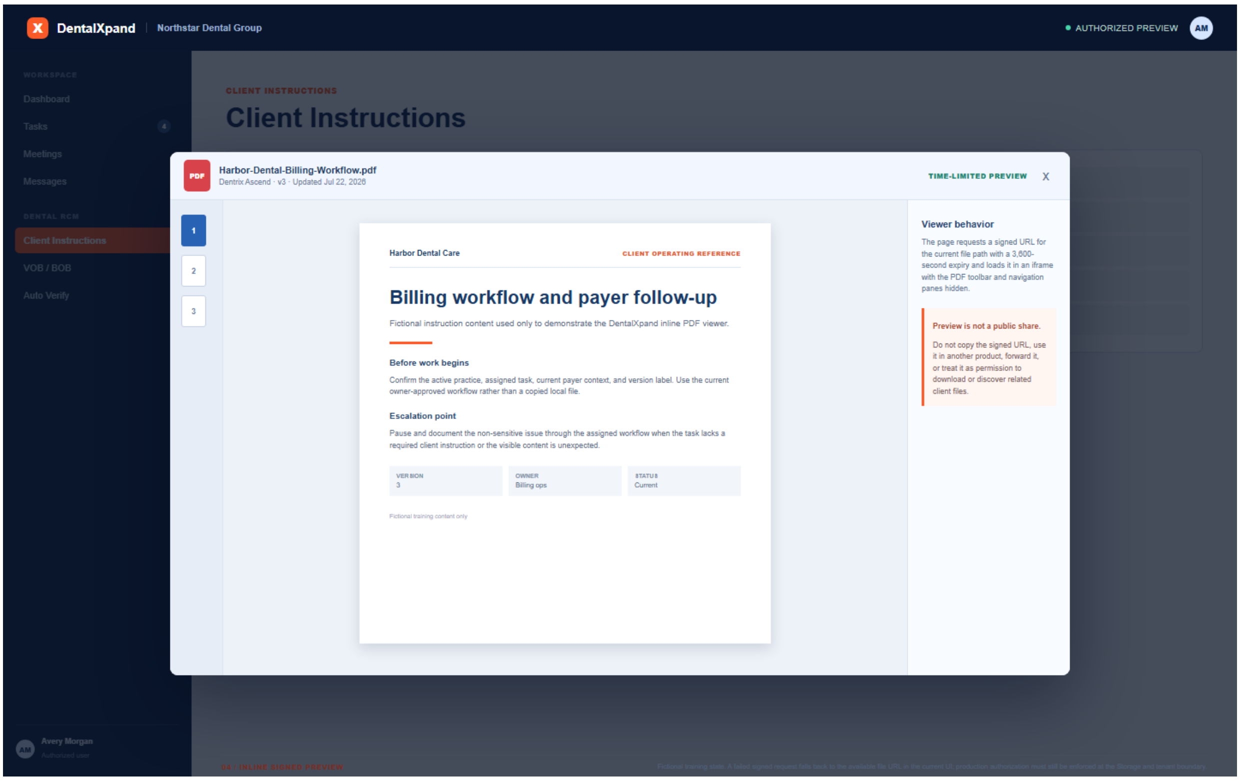

Figure 4. Fictional Client Instructions inline viewer with current file title, software, current version, updated time, time-limited preview guidance, and no-sharing boundary.

Area	Reviewed behavior	Boundary
Current file	View reads the current file path from the instruction record and requests a signed URL using a 3,600-second expiry.	Do not use a copied, cached, forwarded, or external URL to reach the current PDF or related records.
Fallback	If signed URL generation throws, the viewer falls back to the current file's available URL field.	A fallback path must still be protected by live Storage and tenant policy. Never treat it as a public access route.
Viewer	The URL is loaded in an iframe with toolbar and navigation panes hidden. The header shows type, client, software, version, and updated time.	Browser, format, network, expiration, iframe policy, file state, and access policy can affect rendering.
Download	The current Client Instructions viewer does not display a download control.	Preview does not grant permission to download, print, screenshot, forward, copy, or keep an unmanaged local file.

06 / UPDATE AND VERSION

Replace the current PDF deliberately and record why it changed

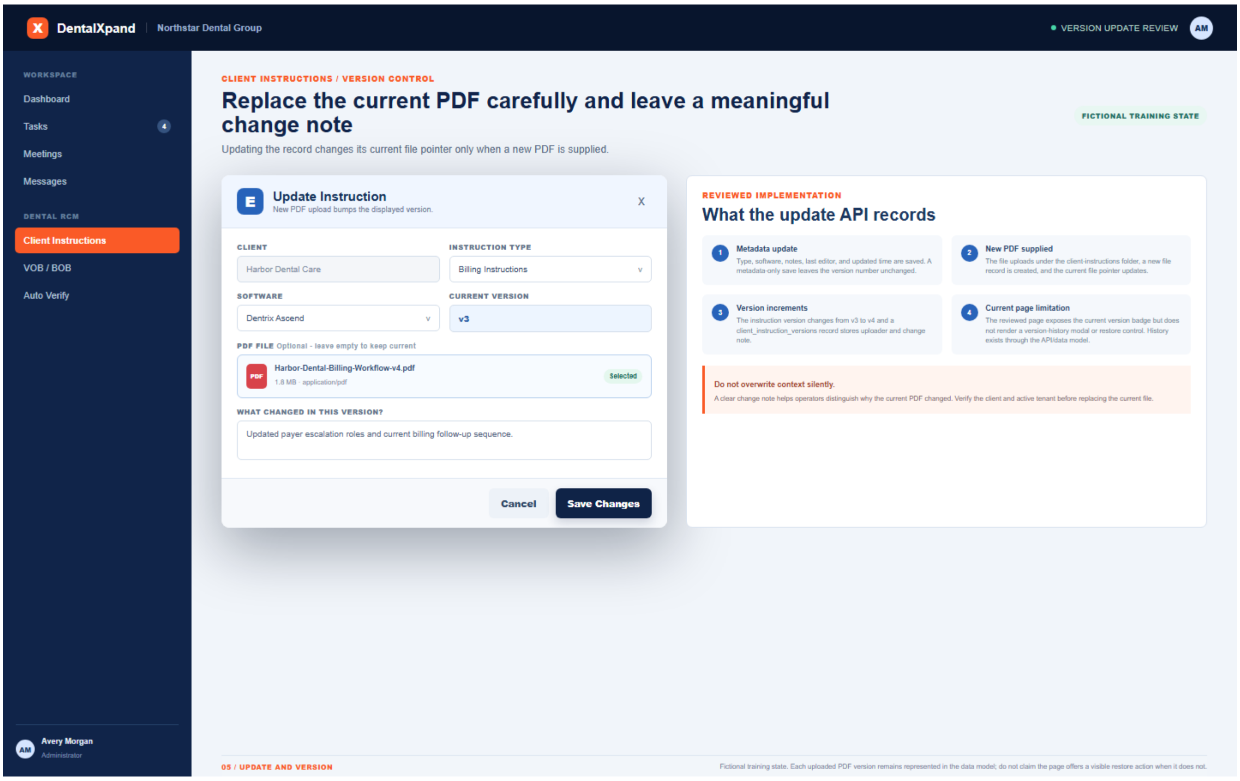

Figure 5. Fictional Update Instruction form with disabled client field, current version, selected replacement PDF, required review of change reason, and implementation notes.

Update case	Current behavior	Required discipline
Client	The edit form disables Client and the update API does not accept a client ID change.	Do not repurpose a record for another client. Create the correct record through an authorized workflow.
Metadata only	Type, software, notes, last editor, and updated time can change without a replacement PDF.	Current version stays unchanged. Do not imply a file changed when it did not.
New PDF	A new file creates a file record, replaces current_file_id, increments version, and creates a client_instruction_versions row.	Confirm owner approval, client and tenant scope, retention impact, and source before replacement.
Change note	The What changed field appears only in edit with a selected replacement PDF. The API uses the note or a default Version N label.	Use a concise operational reason. Never put credentials, protected data, or informal sharing instructions into the note.
History limit	The API has getVersions, but this page does not render history, compare, restore, or prior-file download controls.	Do not promise users a UI recovery function that does not exist. Use approved admin/support procedures after policy review.

07 / ARCHIVE

Archive with source, task, version, retention, and tenant discipline

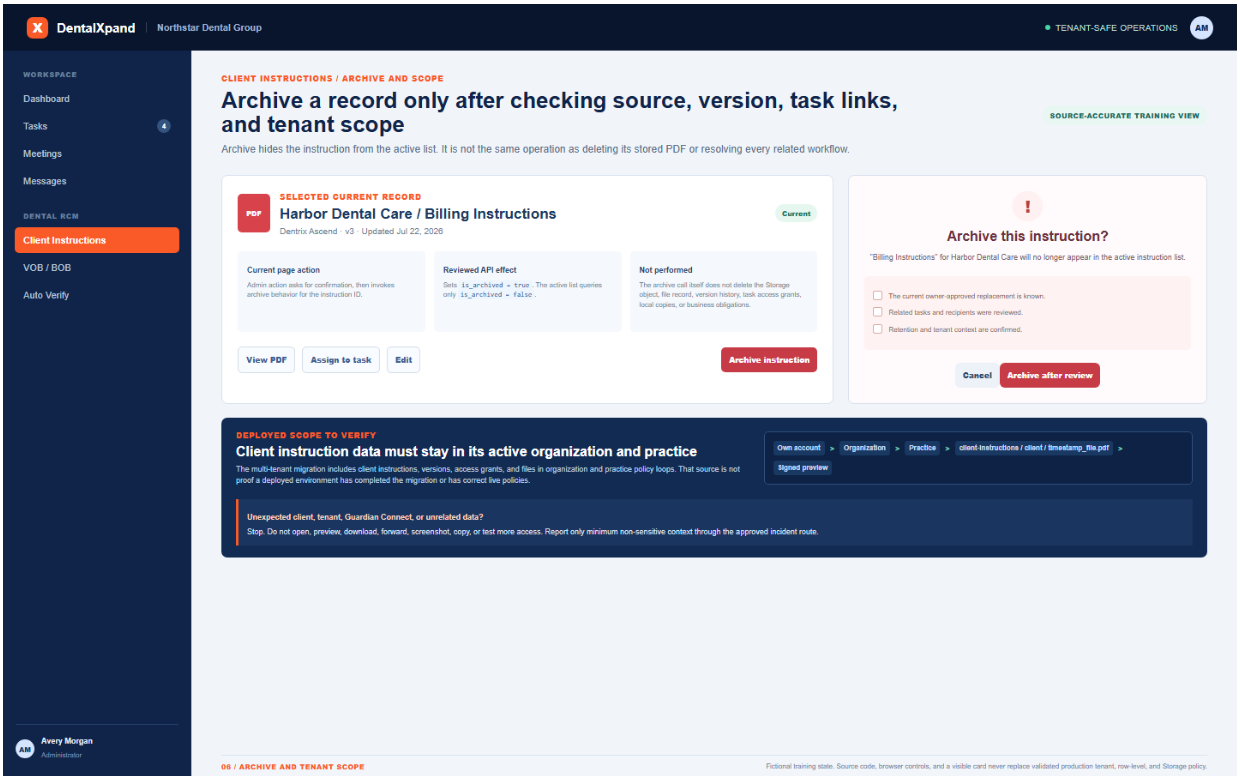

Figure 6. Fictional archive confirmation and tenant-scope review showing current record effect, what archive does not perform, scope sequence, and unexpected-data response.

Area	Reviewed behavior	Boundary
Confirmation	The current page asks for confirmation before calling archive behavior for the instruction ID.	A confirmation prompt does not complete a replacement, retention, access review, or incident response.
Archive effect	The API updates is_archived to true. The active query filters false, so the record disappears from the normal list after refresh.	Visual disappearance is not permanent deletion, access revocation, or proof related tasks and files are resolved.
Not deleted	The archive call does not remove Storage objects, file rows, version rows, task grants, local copies, screenshots, or business obligations.	Do not use archive to hide a wrong-tenant, unsafe, missing-approval, or exposure event. Stop and report appropriately.
Verify	The page refreshes after archive success.	Confirm the correct replacement or policy state with the owning workflow before treating operational work as complete.

> Archive is not incident containment
> If the PDF or record is wrong client, wrong tenant, Guardian Connect content, unexpected data, or lacks approval, do not silently archive and continue. Stop exposure and report the safe minimum context.

08 / TENANT AND STORAGE SCOPE

Verify deployment state before assuming client instruction data is isolated

Layer	Source implementation	Production requirement
Instruction records	The multi-tenant migration includes client_instructions, client_instruction_versions, and client_instruction_access in organization and practice policy loops.	Verify deployed migration completion, correct organization/practice IDs, and live authenticated policies. Source code alone is not proof of production state.
Legacy baseline	The older Client Instructions migration creates broad setup policies before the later tenant migrations replace policies.	Never rely on the older baseline alone for isolation. Verify later tenant and practice policies are the ones active in the deployed database.
File path	Create and update use client-instructions/client_id/timestamp_filename through a tenant-aware storage helper.	When context is present, organization and practice prefixes must be validated. Never construct or reuse another tenant path.
Signed delivery	The viewer creates a signed URL from the files bucket for the current path.	Keep Storage non-public with appropriate tenant scope. Signed URLs are time-limited, sensitive access artifacts, not share links.
Product boundary	This is a DentalXpand workflow and exposes records, files, URLs, cache, and browser surfaces.	Guardian Connect data must not show here, and DentalXpand client data must not show in Guardian Connect. Treat crossing as an incident.

Never test isolation through additional access
Do not probe client IDs, task IDs, paths, URLs, caches, direct routes, or another account to discover what is reachable. A suspected scope failure must be stopped and reported, not investigated with more exposure.

09 / TROUBLESHOOT

Resolve expected states without bypassing page, client, file, or tenant controls

What you see	Possible reason	Correct first response
Route or page is missing	Account, page permission, organization, practice, or session can deny the route.	Respect the response, verify your own expected context, then use an authorized administrator or support path.
New, Edit, or Archive is missing	The page only renders those actions for admin or super-admin roles.	Do not bypass. Confirm documented authority and ask an authorized administrator when appropriate.
Save fails or reports a duplicate	A client/type pair exists, or file, session, network, tenant, row, Storage, or record-save conditions can fail.	Check whether the intended current record should be updated. Keep the PDF approved and report a non-sensitive error.
PDF rejected	The current browser validation rejects a non-PDF or a file over 25 MB.	Use an approved PDF inside the UI limit. Do not alter filename, MIME, or browser behavior to evade validation.
Preview fails	Signed URL, expiration, Storage access, file path, browser, network, format, or iframe policy can be unavailable.	Refresh the authorized record once and report safe symptoms. Never paste a signed URL into an external tool.
Task grants unexpected audience	Task assignee, supervisor, or team membership may differ from the operator's assumption.	Stop broader sharing, inspect task ownership through authorized controls, and report unexpected behavior without exposing the PDF further.
Wrong tenant or Guardian Connect data	Session, cache, mapping, policy, URL, Storage, or deployment isolation may be wrong.	Stop immediately, avoid further access, and report only page, time, expected scope, role, and non-sensitive behavior.

Support safely
Use only minimum necessary, non-sensitive context. Never attach a client PDF, signed URL, live Storage path, credential, token, protected screenshot, or another person's account details to an unapproved ticket.

10 / COMPLETION

Verify safe Client Instructions handling

- I can distinguish current instruction record, current file, version row, task grant, signed URL, inline preview, archive state, and local copy as separate surfaces with different risks.
- I confirm my own account, expected organization/practice, client, instruction type, software context, source workflow, task audience, and retention need before action.
- I use search, client/type/software filters, Table or Detailed view, and refresh without treating them as authorization, discovery, audit, or source truth controls.
- I know the page uses local instruction type and software lists plus Add Manual, while the separate options API/table is not managed through the reviewed screen.
- I create a new record with one correct client/type pair, an approved PDF, minimal notes, and the current browser PDF and 25 MB checks.
- I inspect task assignment, supervisor, and team audience before creating task-linked access grants.
- I know View uses a current signed URL and does not create permission to share, download, print, screenshot, or investigate other PDFs.
- I know replacement PDFs increment the version and create history data, while metadata-only updates do not increment the number.
- I do not promise a visible history, restore, or compare feature when the reviewed Client Instructions page does not render one.
- I know archive hides the active record but does not erase related file, version, access, local-copy, or retention responsibilities.
- I stop and report any cross-client, cross-tenant, cross-practice, Guardian Connect, or unrelated data event immediately.

> Continue safely
> Use the Documents guide for shared file, signed URL, Storage, and incident-handling discipline. Keep operational records in the intended tenant and protect every current file as a scoped business reference.

Website guide	Documents guide	All resources
Website guide	**Documents guide**	**All resources**