

Classification and file plans

Custodia Registry · G01

Your task and authority

Berland Hope

- Confirm your assigned duties
- Use the fictional training case
- Verify the result and its history

Learning outcome

Learner maps a record consistently without representing a draft plan as approved.

Approved hierarchy

Bertland Hope

- Locate the approved classification hierarchy.

What to check

Locate the classification structure authorized by the organization. Read access and management access differ. Do not treat a locally created draft as the governing plan for production records.

Trace the series

Berland Hope

- Trace a sample record from function through series/subseries.

What to check

Follow the sample from function through its applicable levels to series or subseries. Explain why that mapping fits the record's business purpose. A convenient category is not necessarily the formal classification.

Draft a plan

Bertland Hope

- Create a training-only plan and entry when authorized.

What to check

Create the training-only plan and entry only with management authority. Check names and hierarchy against the approved exercise. Saving a draft records proposed work; it does not establish approval.

Approval responsibility

Bertrand Hope

- Submit or record its approval using the available authority.

What to check

Use the authorized approval step and inspect its status. A default records manager can build plans but does not receive file-plan approval authority. The organization determines who can approve the classification.

Confirm the mapping

Bertland Hope

- Confirm the record uses the intended plan and distinguish category from formal classification.

What to check

Check that the record points to the intended plan and series. Explain the distinction between category and formal classification. Keep the decision traceable for later retention and reporting work.

Exceptions and recovery

Bertland Hope

- Identify the blocked condition
- Preserve the relevant evidence
- Use the authorized next step

Important boundary

Do not promote roadmap/governance claims into implemented screens. A records_manager lacks default file-plan approval; organizational policy controls valid classifications.

Guided practice

Bertland Hope

- Work within the assigned role
- Show the resulting state
- Explain one exception

Your exercise

Trace a fictional record through an approved hierarchy and identify who can build versus approve its file plan.

Practice debrief

Berland Hope

- Correct identity and authority
- Traceable result and history
- A justified next step

Expected answer

The mapping follows the intended hierarchy; draft and approved status are distinguished; category is not substituted for formal classification.