

Volumes and transfers

Custodia Registry · R07

Your task and authority

Berland Hope

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

Learning outcome

Learner preserves the volume chain and explains who owns versus who physically holds a file.

Read the volume chain

Berland Hope

- Inspect the active volume and its predecessor links.

What to check

Identify the active volume and its predecessor links. Volume history preserves continuity across parts of a file. A closed volume is not simply another editable copy of the active one.

Create the next volume

Berland Hope

- Create the next eligible training volume and verify number, new creation date and source history.

What to check

Use normal next-volume creation only when the source is eligible. Check the new number, its own creation date and the predecessor link. The new volume must not inherit the old volume's creation date.

Special volume authority

Bertrand Hope

- Explain early rollover and archived access as separate authorities.

What to check

Early rollover, archived access, unlock and issue are separate advanced permissions. Normal volume creation does not authorize all of these actions. Explain the permitted path for the learner's duties.

Ownership transfer

Bertrand Hope

- For an available file, record an approved department/owner transfer with reason.

What to check

Confirm availability and the approved new department or owner. Record the reason through the transfer workflow. Changing responsibility is not the same as recording a physical checkout.

Inspect transfer history

Bertrand Hope

- Inspect transfer history and distinguish ownership change from physical checkout.

What to check

Review the saved ownership change and history. Compare this with current holder and storage location. These fields can describe different people or places without being contradictory.

Exceptions and recovery

Bertrand Hope

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

Important boundary

Closed-volume and checkout restrictions remain. Archived issue/unlock is advanced governance, not normal editing. A new volume must not inherit the source creation date.

Guided practice

Berland Hope

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

Your exercise

Compare an active and closed volume. Explain the checks for a new volume, then distinguish an approved ownership transfer from borrowing the physical file.

Practice debrief

Bertland Hope

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

Expected answer

The learner preserves the volume chain, checks the new date and distinguishes ownership from custody. Advanced archived actions are referred to the appropriate authority.