

Metadata import

Custodia Registry · R08

Your task and authority

Berland Hope

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

Learning outcome

Import results match approved rows without bypassing record locks or clearance.

Supported input

Bertrand Hope

- Download the supported template and prepare fictional metadata.

What to check

Use the supplied template and fictional metadata. Check identifier, column meaning and date values before upload. Import permission is a specific assignment and is not included in the default records-manager preset.

Mapping and preview

Bertrand Hope

- Upload and map columns, then inspect preview errors and duplicate choices.

What to check

Map each column to its intended field and inspect preview errors. A successful file upload is only the beginning. Preview allows you to find invalid rows and review duplicate handling before committing.

Duplicate targets

Bertrand Hope

- Verify each duplicate target is visible and editable; do not provision around denied records.

What to check

A duplicate update still needs normal visibility, edit authority and state checks. Inaccessible duplicates must not be used to reveal protected titles. Do not change grants just to get a batch through.

Cancel and correct

Bertrand Hope

- Cancel a faulty batch, correct it, preview again and confirm only the intended valid rows.

What to check

Cancel the faulty practice batch and repair the source data. Preview again before confirming intended valid rows. Keep the preview decision distinct from the actual commit.

Verify imported rows

Bertrand Hope

- Reopen one created and one updated record and inspect history.

What to check

Reopen a created record and an updated record. Compare the saved fields with the approved input and inspect history. Counts are useful, but they do not replace checking the individual results.

Exceptions and recovery

Bertland Hope

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

Important boundary

Import is not granted to the default `records_manager` preset. Preview is not commit; inaccessible duplicates must not disclose titles. Do not run imports against production during training.

Guided practice

Berland Hope

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

Your exercise

Review a fictional import containing a valid new row, an editable duplicate and an invalid date. Explain the correction and verification sequence without importing into production.

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

Expected answer

The learner separates preview from commit, rejects or corrects the invalid row, respects duplicate access checks and verifies both create and update results.