

Duplicate cases and bulk changes

Custodia Registry · R09

Your task and authority

Berland Hope

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

Learning outcome

Learner distinguishes duplicate governance from arbitrary deletion and verifies bulk scope.

Open a duplicate case

Bertrand Hope

- Open a suspected duplicate case without deleting either record.

What to check

A suspected duplicate needs evidence and a governed case. Do not delete either record simply because the titles look alike. Record the identifiers and why you believe they refer to the same material.

Assignment and review

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- Assign and review evidence using the permitted case stage.

What to check

Work within the current case stage and your assigned authority. Compare the evidence before recommending an outcome. Permission to open a case is not permission to approve retirement.

Authorized decision

Bertrand Hope

- Submit for approval and record the authorized decision.

What to check

Submit the case for its required decision and inspect the resulting state. Approval and rejection preserve an explanation. Follow the governed retirement route rather than treating it as ordinary deletion.

Bulk selection scope

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- In Records, compare current-page selection with all-matching count before a practice bulk physical-status correction.

What to check

Compare selected rows on the current page with an all-matching selection. Read the total before a practice physical-status correction. A broad filter can select more records than are currently visible.

Results and exclusions

Bertrand Hope

- Inspect result/skipped counts and movement notes; retain governed records unchanged.

What to check

Inspect success and skipped counts with movement notes. A physical-status correction does not update digitization progress. Respect custody, clearance and retention exclusions rather than retrying them through a bypass.

Exceptions and recovery

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

Important boundary

Physical status correction does not change digitization status. Restricted, custody-locked or retained records can be excluded. Do not retry skipped rows through a bypass.

Guided practice

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

Your exercise

Review two similarly titled fictional records and propose a duplicate case. Explain the difference between current-page and all-matching selection, then interpret a skipped-row result.

Practice debrief

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

Expected answer

The learner preserves both records pending review, identifies the right decision owner, confirms selection scope and explains exclusions without claiming all rows changed.