

Reports and exports

Custodia Registry · V01

Your task and authority

Berland Hope

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

Learning outcome

Learner can explain the report population and trace a result back to a record.

The reporting question

Bertland Hope

- Choose the report matching the question and apply filters.

What to check

Choose the report that answers the assigned question, then apply the relevant filters. Different reports describe different populations. A familiar report title is not enough to establish that its scope is correct.

Population and period

Bertrand Hope

- Check the population, date window and access scope.

What to check

Check the date window, department filter and permitted record scope. Department is not tenant isolation. Classification and volume rules still limit the records available to the account.

Preset and sample row

Berland Hope

- Save an appropriate report preset and compare one row with record detail.

What to check

Save a useful preset when permitted and compare one known row with record detail. The preset records a convenient selection; it does not extend access or freeze future results.

Export and inspect

Bertland Hope

- Export only the permitted report or package and inspect its fields/counts.

What to check

Use only the permitted CSV or package option. Compare fields and counts with the intended report. Operational reporting CSV is different from the verifiable audit export used in the integrity lesson.

Readable handoff

Bertland Hope

- Use a mini-sheet or movement register when a readable handoff record is needed.

What to check

Choose a mini-sheet or movement register when the recipient needs a readable record of the work. Check identity and audience before distribution. Exported material retains its handling requirements.

Exceptions and recovery

Bertrand Hope

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

Important boundary

Department filtering is not tenant isolation. Operational CSV is not the verifiable audit format. Do not distribute classified exports outside the approved audience.

Guided practice

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

Your exercise

Choose a report for a fictional custody question, explain its filters and trace one row to the source record. Identify the correct output for a handoff.

Practice debrief

Berland Hope

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

Expected answer

The learner explains population and period, verifies a sample row and distinguishes operational exports from audit evidence while respecting the approved audience.