

Custodia — Step-by-step Walkthrough

Configure a document type and metadata schema, upload and admit a training file, control versions and sharing, then inspect retention, redaction and an explicitly reviewed export.

Use the current tenant, profile and permitted actions. Screenshots illustrate the application; example records and date fields may differ in your environment.

Contents

1. Demonstration story, prepared data and participants
2. Demonstration sequence and visible outcomes
3. Demonstration · Configure the content type, metadata and capture template
4. Demonstration · Upload and resolve the document's processing stages
5. Demonstration · Control checkout, check-in and exact-version review
6. Demonstration · Review bounded sharing and exact-version redaction
7. Demonstration · Inspect retention and legal holds before disposition
8. Demonstration · Generate an approved export and track archive retrieval
9. Additional demonstration · Access, prerequisites and example values
10. Additional demonstration · Configure document capture
11. Additional demonstration · Step 1 · Create and approve a document class / content type
12. Additional demonstration · Step 2 · Define a metadata schema and typed fields
13. Additional demonstration · Step 3 · Maintain controlled vocabularies and classification definitions
14. Additional demonstration · Step 4 · Create an entry template and capture from it
15. Additional demonstration · Capture and work with a document
16. Additional demonstration · Step 1 · Upload one or several documents
17. Additional demonstration · Step 2 · Follow the nine processing stages
18. Additional demonstration · Step 3 · Enter document metadata and resolve validation
19. Additional demonstration · Step 4 · Checkout, check in, rename and verify versions
20. Additional demonstration · Step 5 · Preview, print and download a document
21. Additional demonstration · Step 6 · Private annotations and reviewed redaction
22. Additional demonstration · Step 7 · Find documents and save a search
23. Additional demonstration · Step 8 · Collections, system collections and document relationships
24. Additional demonstration · Share and independently review documents
25. Additional demonstration · Step 1 · Request and review controlled sharing
26. Additional demonstration · Step 2 · Use Shared with me as a recipient
27. Additional demonstration · Step 3 · Complete independent review and follow corrections

- 28. Additional demonstration · Manage retention and preservation
- 29. Additional demonstration · Step 1 · Apply a retention schedule and inspect obligations
- 30. Additional demonstration · Step 2 · Create and release a legal hold
- 31. Additional demonstration · Step 3 · Event-based retention and future policy changes
- 32. Additional demonstration · Step 4 · Review and execute document disposition
- 33. Additional demonstration · Export and archive governed content
- 34. Additional demonstration · Step 1 · Build, review and download a governed export
- 35. Additional demonstration · Step 2 · Revoke, recover and dispose of an export package
- 36. Additional demonstration · Step 3 · Transfer a package into the configured archive
- 37. Additional demonstration · Step 4 · Request and use archive retrieval
- 38. Additional demonstration · Step 5 · Dispose of an archive copy
- 39. Additional demonstration · Recover processing and storage issues
- 40. Additional demonstration · Step 1 · Processing operations, retries and bounded batches
- 41. Additional demonstration · Step 2 · Storage, investigations, scans and orphan packages
- 42. Cross-module handoffs and the record references to retain
- 43. Problem → responsible action → safe continuation
- 44. Close the demonstration and hand over the operating guide

Demonstration story, prepared data and participants

Configure a document type and metadata schema, upload and admit a training file, control versions and sharing, then inspect retention, redaction and an explicitly reviewed export.

Worked example and preparation

Prepare two non-sensitive training PDFs, an approved document class/type, required metadata values, a distinct reviewer and a named recipient. Use disposable content for any separately authorized disposal rehearsal.

Responsibilities

Role	Responsibility
Document administrator	Maintains types, schemas, templates, retention and controlled vocabularies.
Contributor	Captures files and metadata and manages permitted versions.
Reviewer / recipient	Reviews exact-version work or uses a bounded granted share.
Records/export operator	Performs separately authorized retention, export, archive or disposition actions.

Terms used in this module

Term	Meaning
Document / version	The enduring content identity and its specific bytes.
Admission	Security/processing eligibility before ordinary use.
Metadata schema	Typed business values required for the selected content type.
Share / export / archive	A bounded grant, a derived disclosure package and a separately managed archive copy.
Hold / retention	Preservation obligations that can prevent disposition.

The procedures below explain operation. Application captures use illustrative records. Record actual demonstration and UAT outcomes separately; a written expected result is not a recorded pass.

Demonstration sequence and visible outcomes

Business journey	Open the detailed steps
Capture policy, admission and exact-version review	<u>Configure the content type, metadata and capture template</u> <u>Upload and resolve the document's processing stages</u> <u>Control checkout, check-in and exact-version review</u>
Controlled sharing and redaction	<u>Review bounded sharing and exact-version redaction</u>
Preservation, export and archive lifecycle	<u>Inspect retention and legal holds before disposition</u> <u>Generate an approved export and track archive retrieval</u>

CHAPTER 3

Demonstration · Configure the content type, metadata and capture template

Open	Who acts
Custodia → Document classes/content types; metadata schema; entry templates	Document administrator and required reviewer

Configure what may be uploaded and what business facts must accompany it before asking users to capture evidence.

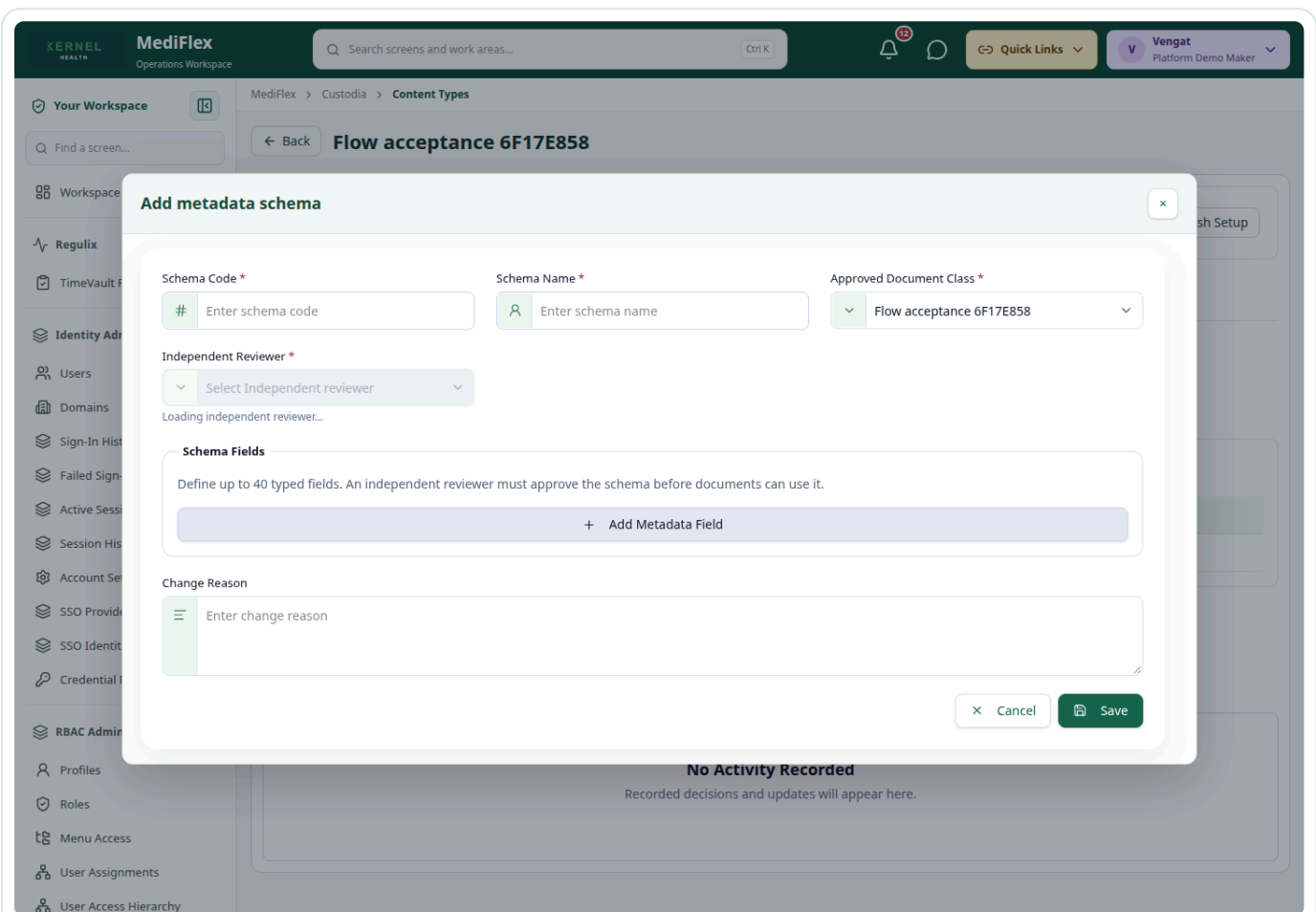
Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Content type / file policy	The eligible training evidence type and accepted formats/size	An extension accepted by the browser may still fail the content-type policy.
Field name / label / type	For example case reference, received date and evidence category	Stable field identity and visible label serve different purposes.
Required / allowed values	The actual business obligation and controlled vocabulary	A required typed field must be completed before validation succeeds.
Entry template / defaults	The approved type and reusable capture values	A default is a starting value, not verified business truth.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Inspect the approved class/type and its format/size rules.	The prepared training file is eligible.

Step	Demonstrator action	Point out on the screen
2	Define the required typed schema fields and controlled vocabulary references.	Users receive explicit labels and permitted values.
3	Complete the applicable schema/type review and effective publication.	The active schema can be used for capture.
4	Create/select an entry template with intentional defaults.	Repeated capture starts from the same controlled structure.
5	Open capture as a contributor and inspect the resulting required fields.	The user sees the effective schema, not an administrator's unpublished draft.



SCREEN 1

Contextual metadata schema form for the selected content type.

Illustrative application screen · select to enlarge.

Evidence to show before continuing

Show type policy, typed required fields and the capture form generated from that schema.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A field or type is absent	Inspect review/effective state and the selected class.
A schema is revised after documents exist	Inspect impact on current validation rather than assuming historical versions were rewritten.

Next part of the demonstration

Upload the prepared file and follow its admission/processing record.

CHAPTER 4

Demonstration · Upload and resolve the document’s processing stages

Open	Who acts
Custodia → Document library → Upload → selected document → Processing	Contributor and processing operator

File transfer, security screening, metadata validation, review and searchable custody are separate stages.

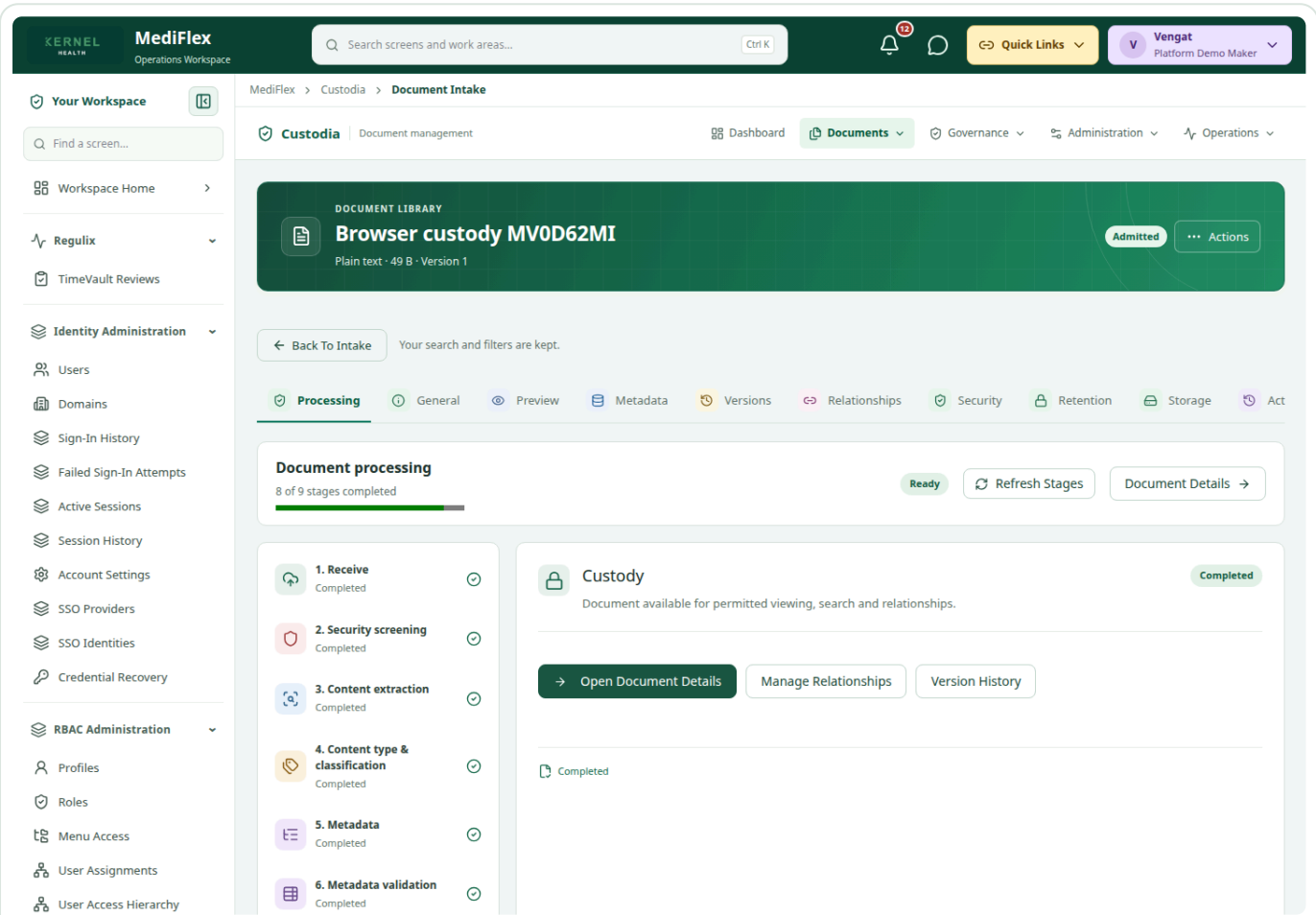
Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Files / title / content type	The prepared non-sensitive PDFs and eligible type	Review each selected file before upload.
Business context / received date / description	The intended case/reference and actual valid business date	Context assignment is separate from filename.
Metadata values	Complete the effective required schema	A successful upload may still need metadata/classification.
Processing stage / version	The current document and exact version	Recovery must address the current blocked stage.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Select files, remove unintended entries and review their type/business details.	Only the intended training files are queued.
2	Upload and inspect each per-file result.	A durable document/version reference exists for accepted transfers.

Step	Demonstrator action	Point out on the screen
3	Open Processing and inspect Receive, Security screening, Extraction, Classification, Metadata, Validation, Policy review, Indexing and Custody in order.	The first blocked or failed stage is identifiable.
4	Resolve permitted metadata/classification errors or route security failures to the processing owner.	Quarantined bytes are not used as ordinary evidence.
5	Refresh the current version and open the permitted preview/search entry.	The document is usable only when its required admission and policy conditions are satisfied.



SCREEN 3

Document processing rail and custody detail for the selected version.

Illustrative application screen · select to enlarge.

Evidence to show before continuing

Show per-file upload result and the first unresolved/resolved processing stage.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The queue pauses	Inspect the active file result; pausing prevents further admission and does not undo accepted uploads.
The document is not searchable	Inspect validation/indexing and current version before uploading a duplicate.

Next part of the demonstration

Complete the required independent document review and then use approved content.

CHAPTER 5

Demonstration · Control checkout, check-in and exact-version review

Open	Who acts
Custodia → selected document → version and review actions	Contributor and independent reviewer

Preserve which bytes were edited, reviewed and used; a document title alone does not identify a reviewed version.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Checkout / owner	The current authorized editing lease	Another user's checkout may prevent conflicting edits.
Check-in file / version reason	The intended replacement bytes and change explanation	The new version does not erase prior content.
Review subject	The selected document version	A newer version may require a fresh decision.
History / current version	The returned version identity and custody events	Use it to compare the actual change.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Open the document and inspect its current version and checkout state.	The editing baseline is known.

Step	Demonstrator action	Point out on the screen
2	Check out through the permitted action and retain ownership.	The editing state becomes attributable.
3	Check in the intended training replacement with a clear version reason.	A new version is preserved under the same document identity.
4	Request/complete the required independent review of that exact version.	The decision is bound to the content actually inspected.
5	Compare current and earlier versions and their history.	Prior evidence remains traceable without representing it as current.

Evidence to show before continuing

Show checkout owner, new version, exact-version decision and preserved prior history.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The file changed while review was pending	Reload and review the applicable current version; stale decisions should not authorize new bytes.
Checkout is held by another person	Use the supported owner/recovery action rather than circumventing the lease.

Next part of the demonstration

Use the reviewed version for sharing, redaction, exports or the MEDES case handoff.

CHAPTER 6

Demonstration · Review bounded sharing and exact-version redaction

Open	Who acts
Custodia → selected document → sharing / page viewer / redaction	Owner, independent reviewer and named recipient

A private annotation, a redacted rendered page and a bounded share have distinct visibility and disclosure consequences.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Share recipient / actions / expiry / purpose	Named authorized recipient, required actions and bounded validity	Do not grant more actions than the recipient needs.
Annotation	A private observation where offered	It is not an organization-wide business review outcome.
Redaction page / rectangle / reason	The exact reviewed region and document version	Rendered masks do not automatically modify original download bytes.
Representation	Original or permitted rendered redacted output	Choose intentionally for the disclosure purpose.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Request a bounded share for the reviewed training document.	Recipient, scope, actions and expiry are explicit.
2	The eligible independent reviewer decides the share request.	Pending sharing does not grant immediate access.
3	Open Shared with me as the named recipient and test permitted actions.	The recipient's view follows the effective grant.
4	In the exact-version page viewer, submit a small training redaction region with its reason.	The request identifies page, bounds and version.
5	After independent redaction review, inspect the rendered masked page.	The approved mask appears on that version's rendered view.
6	Compare the permitted export representation before releasing any file.	Original bytes are not mistaken for redacted rendered output.

Previous page

Page 1 of 1

Next page

Print this page

Refresh page

Close viewer

Page zoom 100% ▾

Source page rendition · 1 applied redactions · Access expires 07:57:17

Owned document review

▼ Page notes and redaction

Notes are private to you. Redaction changes require independent approval. Originals remain available only through their separate download permission.

Independent redaction review requested. The applied mask changes only after approval.

Load page notes and redactions

Rectangle on page 1

Coordinates run from 0 to 1, measured from the top left.

Left	Top	Width	Height
0	0	1	1

Private note

Change reason

Synthetic browser full-page mask

Save private note

Load independent reviewers

Independent redaction reviewer

Native security checker

Request rectangle redaction

Private browser note 1790216505547

Retire note

Applied redaction · Synthetic browser full-page mask

SCREEN 4

Page annotations and exact-version redaction controls.

Illustrative application screen · select to enlarge.

Evidence to show before continuing

Show exact version, bounded recipient grant, independent redaction decision and rendered mask.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
The document version or mask changed	Obtain the required new review/export authority before disclosure.
A recipient cannot open the file	Inspect grant decision, expiry, version access and admission; a copied link is not a grant.

Next part of the demonstration

Use a governed export when the recipient needs a controlled package.

CHAPTER 7

Demonstration · Inspect retention and legal holds before disposition

Open	Who acts
Custodia → selected document → Retention / legal hold; Disposition readiness	Records owner and independent reviewer

Preservation obligations take precedence over a desire to hide or remove content. Inactivation is not a substitute for governed destruction.

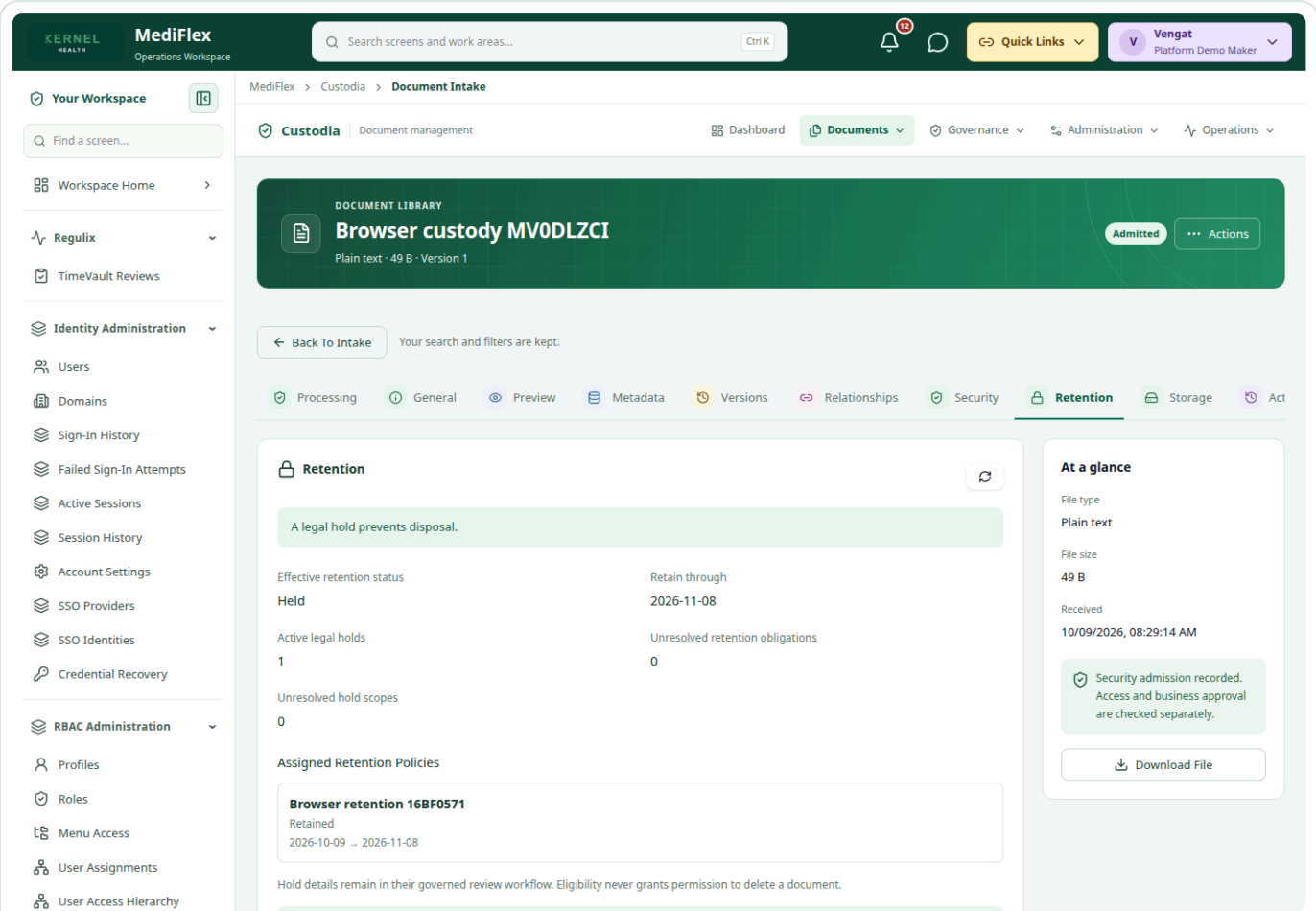
Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Retention schedule / start event	The applicable policy and event basis	A future policy change may need separate governed treatment.
Legal hold / reason	The actual preservation authority	Hold release is its own governed action.
Disposition scope	Document, derived package or archive copy as intended	Different copies have different disposal operations.
Execution confirmation / receipt	The precise reviewed target and resulting certificate	Approval alone is not proof execution occurred.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Inspect current retention, holds, versions, exports and archive copies.	The true disposition blockers are visible.
2	Apply/review the required retention or hold using the supported action.	The obligation has attributable authority.
3	Use Disposition readiness to inspect an eligible disposable training target.	The candidate scope is explicit and current.
4	Where separately authorized, submit disposition and obtain independent review.	The decision covers that precise scope.
5	Execute only the offered current approved action and its exact confirmation.	The actual result is recorded in a receipt/certificate.

Step	Demonstrator action	Point out on the screen
6	Read back retained history and execution result.	A missing file is not used as the sole proof of destruction.



SCREEN 10

Held document and its preservation context.

Illustrative application screen · select to enlarge.

Evidence to show before continuing

Show a hold/retention blocker and disposition readiness; execute destruction only in the separately authorized disposable rehearsal.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
A hold blocks disposal	Keep the blocker and use the legal/records owner’s release process if justified.

Condition to explain	Supported recovery
Execution is interrupted	Resume the saved request when offered rather than creating unrelated deletion work.

Next part of the demonstration

Hand the scoped certificate and remaining obligations to the records owner.

CHAPTER 8

Demonstration · Generate an approved export and track archive retrieval

Open	Who acts
Custodia → Governed exports; Export reviews; archive transfer/retrieval	Export/records operator and independent reviewer

A derived export has a reviewed manifest and release authority; an archive copy has its own transfer and retrieval lifecycle.

Inputs for this part of the prepared example

Input shown on screen	Enter or select	Explain its significance
Document versions / representation	Exact eligible originals or rendered redacted pages	The package must match the intended disclosure.
Purpose / validity / metadata supplements	The bounded recipient need and permitted fields	Private notes and free-text redaction reasons are not ordinary disclosure supplements.
Manifest / checksums	The reviewed snapshot and package integrity values	Generation must not silently omit oversized scope.
Archive transfer / retrieval reference	The specified package/copy and approved retrieval	Archive retrieval is separate from ordinary library download.

Perform and explain

Step	Demonstrator action	Point out on the screen
1	Select exact versions, representation, purpose and permitted supplements.	The export request has an inspectable manifest.
2	Submit and have the reviewer inspect the current snapshot and validity.	The accepted scope is explicit.

Step	Demonstrator action	Point out on the screen
3	Execute the authorized generation and wait for verified package status.	The package is ready only after successful production.
4	Download through the current authorized action and inspect its identity/checksums.	The released artifact matches the reviewed representation.
5	For an approved archive workflow, transfer the specified package and inspect the separate receipt.	An archive copy is not inferred from local generation.
6	Request/review retrieval when needed and inspect the returned copy and validity.	The archive trail remains separate from source-document custody.

Request Document Export

Contract review evidence: AGR-2026

Independent reviewer: Independent Reviewer

Validity in minutes: 60
Starts when submitted - Maximum 24 hours

Purpose: Independent audit

Request reason: Review contract evidence

Content representation: Original files — viewer masks are not applied

☒ Include business metadata ☒ Include complete audit history

Metadata fields (1 selected)

☒ Business Reference
☐ Secondary Reference

☒ I reviewed the selected content representation and disclosure scope.

Up to 16 versions and 24 MiB of original content. Redacted exports support up to 16 pages. Audit history is never silently truncated; requests exceeding 1,000 events or 256 KiB of metadata and audit evidence must be split.

No file is downloaded when you submit.

Submit Export For Review **Close**

SCREEN 11

Governed export scope and selectable supplements.

Illustrative application screen · select to enlarge.

Evidence to show before continuing

Show reviewed manifest, generated checksum, release state and any separate archive receipt.

Demonstrate an exception when the prepared record supports it

Condition to explain	Supported recovery
Access, masks or source scope changed	Resolve the change and obtain the required fresh request; retry does not make stale review valid.
A package is revoked	Future authorized release ends, but earlier downloaded copies are not recalled.

Next part of the demonstration

Use separate package/archive disposal procedures for those derived copies; retain original custody and review history.

CHAPTER 9

Additional demonstration · Access, prerequisites and example values

Prepare a synthetic document with no personal information, an eligible content class/metadata configuration and authorized capture/reviewer identities. Confirm current processing services before promising a preview or download. Use a recipient you control for sharing demonstrations and a prepared non-destructive record for retention/hold explanations.

Input / choice	Example or selection	Meaning / check
Content class / entry template	The eligible class for the training document	Defines admissible content and metadata expectations; do not select a looser class to bypass a rejected file.
Document / version	Returned document ID and specific version	Keep business references tied to the intended version rather than just a filename.
Metadata values	Required fields from the approved metadata definition	Correct business metadata through its supported action; file content and metadata are related but distinct.
Integrity reference	Returned content hash / stored-object receipt	Use the system result to compare generated, stored and exported content.
Review / sharing scope	Current version, eligible reviewer or controlled recipient	Sharing scope and validity do not replace business approval or grant unrelated access.
Retention / hold	Applicable schedule and recorded legal/governance hold	Retention and holds must be checked before any disposition; inactive does not mean disposable.

Use assigned profiles for the stated responsibilities. If a menu is absent, inspect the selected domain/profile and ask the access administrator to check its mappings. Do not substitute a broad administrator profile. If an action is unavailable, check state, current revision and reviewer eligibility.

CHAPTER 10

Additional demonstration · Configure document capture

Use this route when you need to configure document capture.

- 1. Create and approve a document class / content type
- 2. Define a metadata schema and typed fields
- 3. Maintain controlled vocabularies and classification definitions
- 4. Create an entry template and capture from it

CHAPTER 11

Additional demonstration · Step 1 · Create and approve a document class / content type

Before you act	Required context
Screen / entry	Create and approve a document class / content type
Who acts	Authorized operator / reviewer
You need	Prepare a synthetic document with no personal information, an eligible content class/metadata configuration and authorized capture/reviewer identities. Confirm current processing services before promising a preview or download. Use a recipient you control for sharing demonstrations and a prepared non-destructive record for retention/hold explanations.

Steps and field guidance

A document class establishes eligible file formats and the size policy for capture. Use Administration → Document classes / Content Types, or search Create document class. Have the class steward and an independent class reviewer available.

- 1. Search existing classes first. Create a unique code and a business-readable name.
- 2. Choose permitted file formats and maximum file size. A class may be stricter than the shared upload ceiling.
- 3. Save and open the created type's setup. Inspect its metadata configuration and capture defaults.
- 4. Submit the class for its required review. Follow the created task rather than creating a second class.
- 5. The eligible reviewer opens Class review tasks, checks the submitted definition and records the offered decision and reason.

6. Refresh the class and confirm that the approved version appears in the capture lookup. A saved draft is not an approved capture choice.

Expected result
An approved class is eligible for intake; metadata and optional capture configuration can be attached in their governed flows.

Automatic content-type-wide retention, access and storage policy assignment is not established by this setup. The implemented governance operations act on the selected document.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 12

Additional demonstration · Step 2 · Define a metadata schema and typed fields

Before you act	Required context
Screen / entry	Define a metadata schema and typed fields
Who acts	Authorized operator / reviewer
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

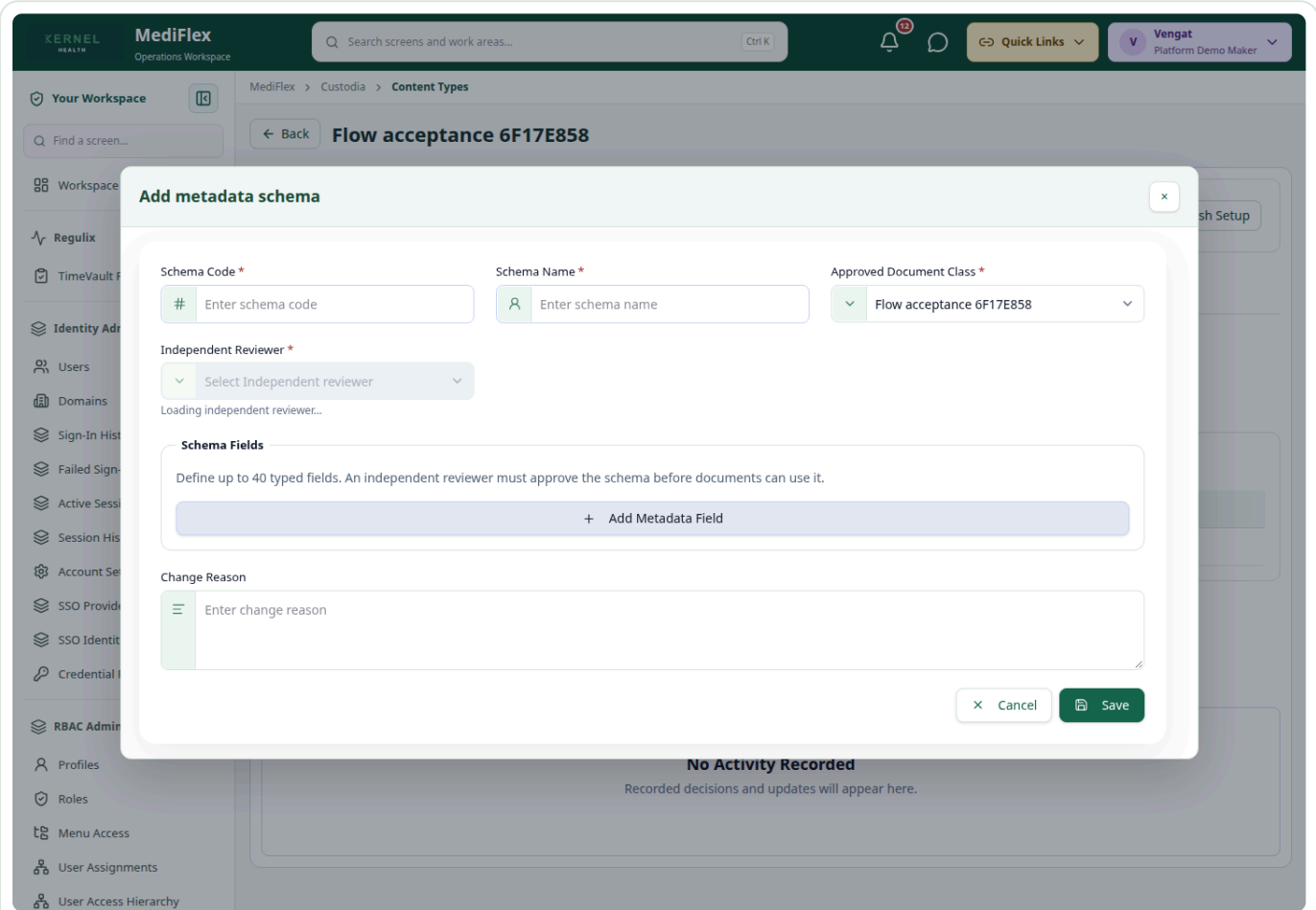
Use the selected content type’s contextual metadata setup or Metadata schemas. The schema defines what users must capture; document values are entered later.

1. Choose the approved document class. Enter Schema Code and Schema Name and select an eligible Independent Reviewer.
2. Use Add Metadata Field to define the required field keys, labels, types and constraints. Use typed fields rather than free-form JSON.
3. Define required values and permitted choices. For a controlled choice, prepare the approved vocabulary before referencing it.
4. Review the complete field list and enter a Change Reason. Save/submit through the available action.
5. The separate reviewer inspects Metadata reviews and decides the exact proposal.
6. For a later change, create a successor from the existing schema and review it. If scheduled effectiveness is used, inspect the effective date and current version.

7. Verify the capture form uses the currently effective approved schema. A successor does not rewrite existing document history.

Expected result
Capture presents typed and validated business fields under the selected approved configuration.

The displayed schema designer allows up to 40 typed fields. Required fields, supported types and limits are authoritative in the current form. An empty reviewer lookup means an eligible independent reviewer is still needed.



SCREEN 1
Contextual metadata schema form for the selected content type.
Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

Additional demonstration · Step 3 · Maintain controlled vocabularies and classification definitions

Before you act	Required context
Screen / entry	Controlled vocabularies and inspect an existing definition or use its request action.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Vocabularies provide approved choices for metadata. Classifications express document sensitivity and access requirements. They are related configuration tasks with different effects.

1. Open Controlled vocabularies and inspect an existing definition or use its request action.
2. Enter the code, label and proposed values required by the form, choose the reviewer and explain the change.
3. Complete Vocabulary reviews before using the new choices. Use successor/retirement actions for an existing approved definition.
4. Open Classifications to prepare a classification definition. Inspect its sensitivity and applicable controls with the records/security owner.
5. Complete Classification reviews. Assign the eligible classification from a document's Security/contextual action.
6. Inspect Document classifications and the document's activity to confirm the actual assignment. Definition approval alone does not classify every document.

Expected result

Users select controlled approved values and current document classifications participate in access checks.

Retirement keeps the governed history. It is not an instruction to delete prior values or original documents. A role's screen access does not override classification clearance.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

Additional demonstration · Step 4 · Create an entry template and capture from it

Before you act	Required context
Screen / entry	Entry templates and request a new definition.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

An entry template is a reusable capture configuration for a supplied file. Pulse owns reusable letter/email content templates; the two template types have different purposes.

1. Open Entry templates and request a new definition.
2. Select an approved class and metadata schema, the optional approved classification, suggested title and typed metadata defaults.
3. Select the independent reviewer and submit the proposal. Inspect Entry template reviews for the decision.
4. After approval, use Capture with entry template. Choose the approved template and inspect the prefilled fields.
5. Select the file and complete or override only fields the form permits. Check the actual values before uploading.
6. Confirm the storage receipt, template provenance and subsequent security admission.
7. Use a reviewed successor to change future capture defaults. Earlier documents keep their own captured version and history.

Expected result
New capture uses the approved version and records its configuration provenance.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 15

Additional demonstration · Capture and work with a document

Use this route when you need to capture and work with a document.

1. Upload one or several documents

2. Follow the nine processing stages
3. Enter document metadata and resolve validation
4. Checkout, check in, rename and verify versions
5. Preview, print and download a document
6. Private annotations and reviewed redaction
7. Find documents and save a search
8. Collections, system collections and document relationships

CHAPTER 16

Additional demonstration · Step 1 · Upload one or several documents

Before you act	Required context
Screen / entry	the stored document from the result or library
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Prepare a synthetic document with no personal information, an eligible content class/metadata configuration and authorized capture/reviewer identities. Confirm current processing services before promising a preview or download. Use a recipient you control for sharing demonstrations and a prepared non-destructive record for retention/hold explanations.

Steps and field guidance

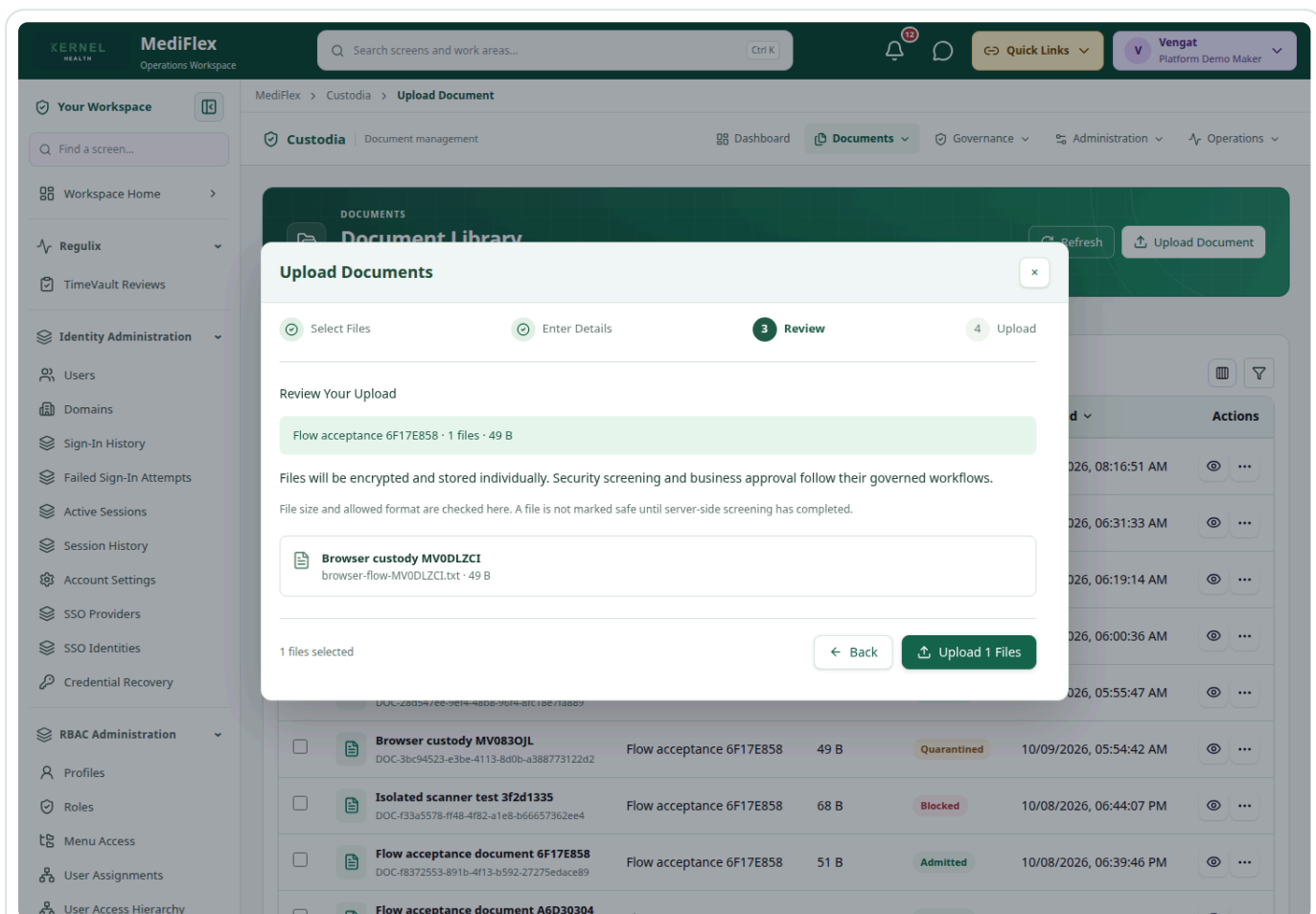
Prepare files that are permitted by the class. Use Upload document or the shared upload dialog. The recorded shared bounds are 20 files, 100 MiB total and 25 MiB per file, with stricter class limits still applied.

1. Select files. Remove an unintended selection before proceeding and read any format/size rejection.
2. Enter details. Choose the approved class or template and complete title and required metadata for each file.
3. Review. Verify each file, class, title and business values; fix validation errors before submission.
4. Upload. Keep the page open while the bounded batch runs and read each file's outcome.
5. For partial success, retain completed receipts and retry only eligible failed entries using the offered action.
6. Open the stored document from the result or library. Continue its Processing stages.
7. Before leaving, inspect the leave warning. Stored documents remain; unfinished file selections and in-browser retry context may not.

Expected result

Each successful file has a storage receipt and document/version identity. Stored in quarantine is not yet admitted.

Supported format families in the recorded implementation include PDF, PNG/JPEG, text, Word DOC/DOCX, TIFF and ZIP, subject to class and worker support. ZIP extraction is bounded text processing; it does not automatically import each archive member as a separate document.



SCREEN 2

Review selected files and capture details before upload.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 17

Additional demonstration · Step 2 · Follow the nine processing stages

Before you act	Required context
Screen / entry	the selected document's processing detail and confirm its document ID and exact version.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

1. Open the selected document's processing detail and confirm its document ID and exact version.
2. Inspect each stage below in order. Open a blocked or failed stage to read its reason and available owner action.
3. Resolve eligible metadata or classification problems, or route admission/scanning failures to the responsible operator. Do not use quarantined bytes as ordinary content.
4. Refresh after the action and recheck the current version. Continue to business review or document use only when its required admission and policy conditions are satisfied.

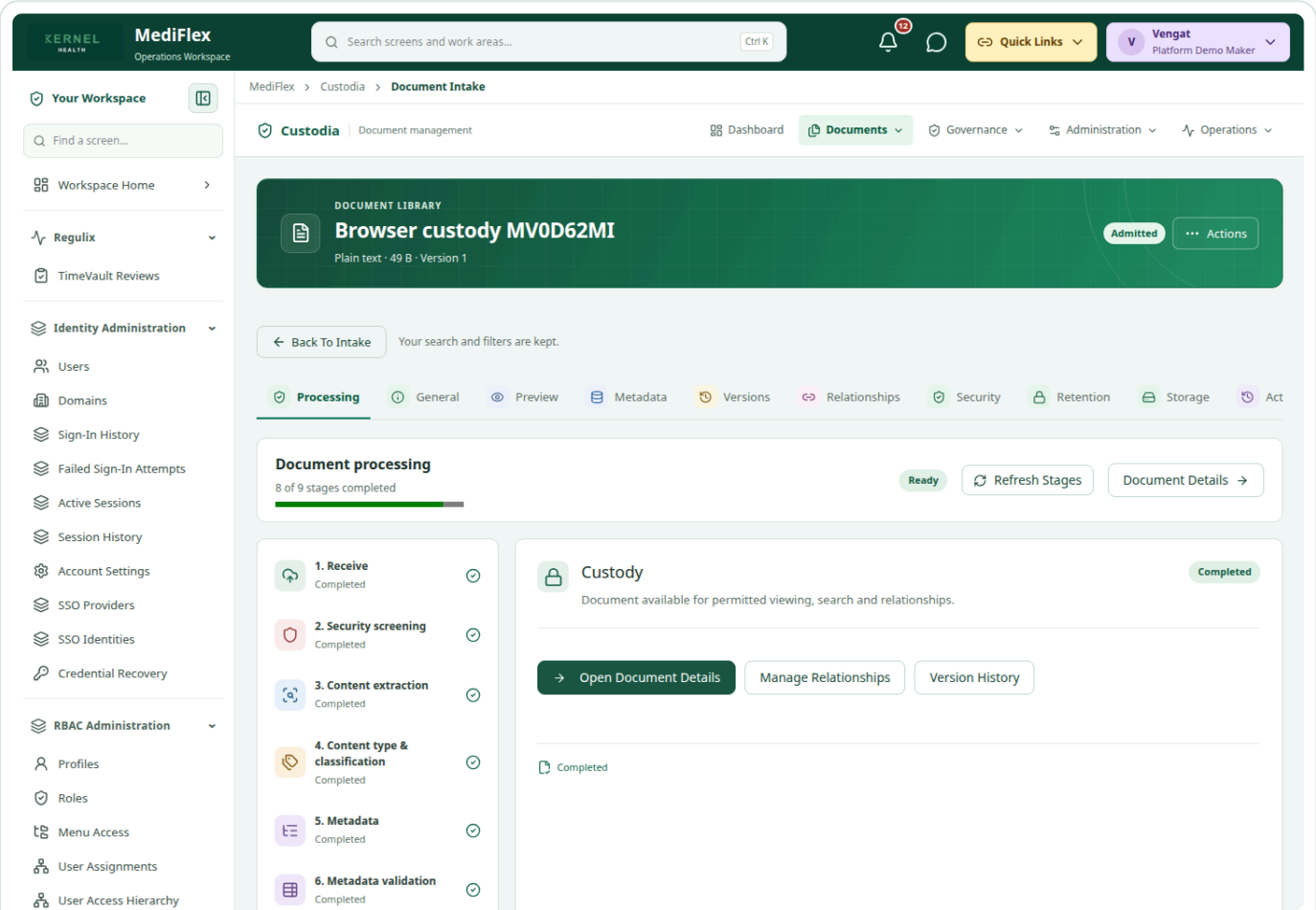
Select a document from intake, exceptions or quarantine. Processing remains attached to that document and version. Refresh stages after a completed operation; if the version changed, reload before continuing.

Item	How to use it
1 · Receive	Confirm encrypted storage receipt and source identity. A failed transfer needs upload recovery.
2 · Security screening	Inspect scanner/admission outcome. Quarantined or blocked bytes are not ordinary viewable content.
3 · Content extraction	Inspect extraction/OCR outcome and supported format. Extraction success is separate from business correctness.
4 · Content type & classification	Confirm the approved type and current classification assignments.
5 · Metadata	Enter the required business values against the effective schema.
6 · Metadata validation	Resolve missing or invalid values shown for this document.
7 · Policy review	Complete required governance or independent checks. A missing configuration is not an approval.
8 · Indexing	Confirm the current source/version is searchable. Stale or missing indexes require supported recovery.

Item	How to use it
9 · Custody	Inspect readiness for permitted viewing, search and relationships.

Expected result

The stage rail and each stage’s detail explain completed, blocked, pending or unconfigured work. The fraction completed alone is not proof that every policy exists.



SCREEN 3

Document processing rail and custody detail for the selected version.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

Additional demonstration · Step 3 · Enter document metadata and resolve validation

Before you act	Required context
Screen / entry	Enter document metadata and resolve validation
Who acts	Authorized operator / reviewer
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Open the selected document's Metadata tab or the metadata processing stage. Configuration authoring and entering document values are separate activities.

1. Check the document title, version, class and effective schema.
2. Complete required fields using their appropriate text, number, date, time, boolean or controlled-choice controls.
3. Use multi-value controls only when the schema permits multiple values. Do not place several unrelated values in a single typed field.
4. Save the current values and read validation messages. Correct the named field rather than changing the class to bypass a rule.
5. Complete any required metadata review through its offered task.
6. Refresh the processing stages and inspect metadata/activity history to confirm the result.

Expected result

Current values satisfy the applicable schema and remain associated with the correct document version.

An unauthorized metadata field can be hidden or read-only. Full-text search and facets also apply current field permissions; missing values in search can be an access outcome.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

Additional demonstration · Step 4 · Checkout, check in, rename and verify versions

Before you act	Required context
Screen / entry	Versions and inspect the current version, earlier versions, source checksum and checkout state.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Versions preserve immutable content. A title change is not a content replacement. Use a non-sensitive training document to verify versioning.

1. Open Versions and inspect the current version, earlier versions, source checksum and checkout state.
2. Use Checkout when editing is authorized. An existing exclusive checkout can block another editor.
3. Use Check-in with the intended replacement file and the required context. Keep the confirmed receipt and new version reference.
4. Wait for the replacement's own admission and processing checks before relying on it.
5. To abandon an unused checkout, use Cancel checkout. It does not delete earlier content.
6. Use Rename for a permitted business-title correction and refresh the document after the command.
7. Use Verify version / permitted historical retrieval when needed to inspect exact content identity and integrity.

Expected result

A new version retains the previous version history; changed titles do not manufacture a new content approval.

If the record changed since you opened it, refresh and inspect the latest revision. Grants, redactions, review tasks and exports can be pinned to a particular version; do not assume they move automatically to a replacement.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

Additional demonstration · Step 5 · Preview, print and download a document

Before you act	Required context
Screen / entry	Preview, print and download a document
Who acts	Authorized operator / reviewer
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Preview, page printing and original download are separately authorized. Open Preview for the exact eligible version, or open a currently valid shared grant.

1. Confirm admission and the requested version before opening the viewer.
2. Navigate pages and use zoom to inspect the content. Reflowed text layouts are labelled; PDF page rendering preserves its source page layout.
3. Use the viewer's current-page print only when offered. The browser print dialog does not prove a physical print completed.
4. Use original download only when separately authorized. The original preserves its original bytes.
5. Close the viewer when finished. On session expiry, reopen through the document's authorized viewer action rather than reusing an old page URL.

Expected result
The permitted representation is displayed with current version, classification, grant and redaction checks.

Approved redaction masks protect rendered pages. They do not rewrite the original file. Viewer runtime limits can be stricter than upload limits; a file accepted for storage is not guaranteed to support every preview representation.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

Additional demonstration · Step 6 · Private annotations and reviewed redaction

Before you act	Required context
Screen / entry	the exact document version in the authorized page viewer.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Use notes to record private observations. Use redaction requests for exact page regions that need independent approval. These actions have different visibility and consequences.

1. Open the exact document version in the authorized page viewer.
2. Add a private note where offered. Keep its purpose clear; a private annotation is not an organization-wide business decision.
3. For redaction, identify the page and rectangle, enter the required reason and submit the request.
4. An eligible separate reviewer opens Redaction reviews, inspects the proposed region and exact version, and records the decision.
5. Reopen the permitted rendered page after approval and verify the burned-in mask.
6. For removal or correction, use the governed removal/review action. A changed mask can invalidate an earlier redacted export.

Expected result
The approved mask is bound to the reviewed version; original bytes and private-note handling remain separate.

Do not send an original download expecting the rendered mask to have changed it. Search snippets/raw text can be suppressed for masked versions to avoid disclosing covered content.

Previous page

Page 1 of 1

Next page

Print this page

Refresh page

Close viewer

Page zoom 100% ▾

Source page rendition · 1 applied redactions · Access expires 07:57:17

Owned document review

▼ Page notes and redaction

Notes are private to you. Redaction changes require independent approval. Originals remain available only through their separate download permission.

Independent redaction review requested. The applied mask changes only after approval.

Load page notes and redactions

Rectangle on page 1

Coordinates run from 0 to 1, measured from the top left.

Left	Top	Width	Height
0	0	1	1

Private note

Change reason

Synthetic browser full-page mask

Save private note

Load independent reviewers

Independent redaction reviewer

Native security checker

Request rectangle redaction

Private browser note 1790216505547

Retire note

Applied redaction · Synthetic browser full-page mask

SCREEN 4

Page annotations and exact-version redaction controls.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 22

Additional demonstration · Step 7 · Find documents and save a search

Before you act	Required context
Screen / entry	a result and confirm its version and context before using its content.

Before you act	Required context
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

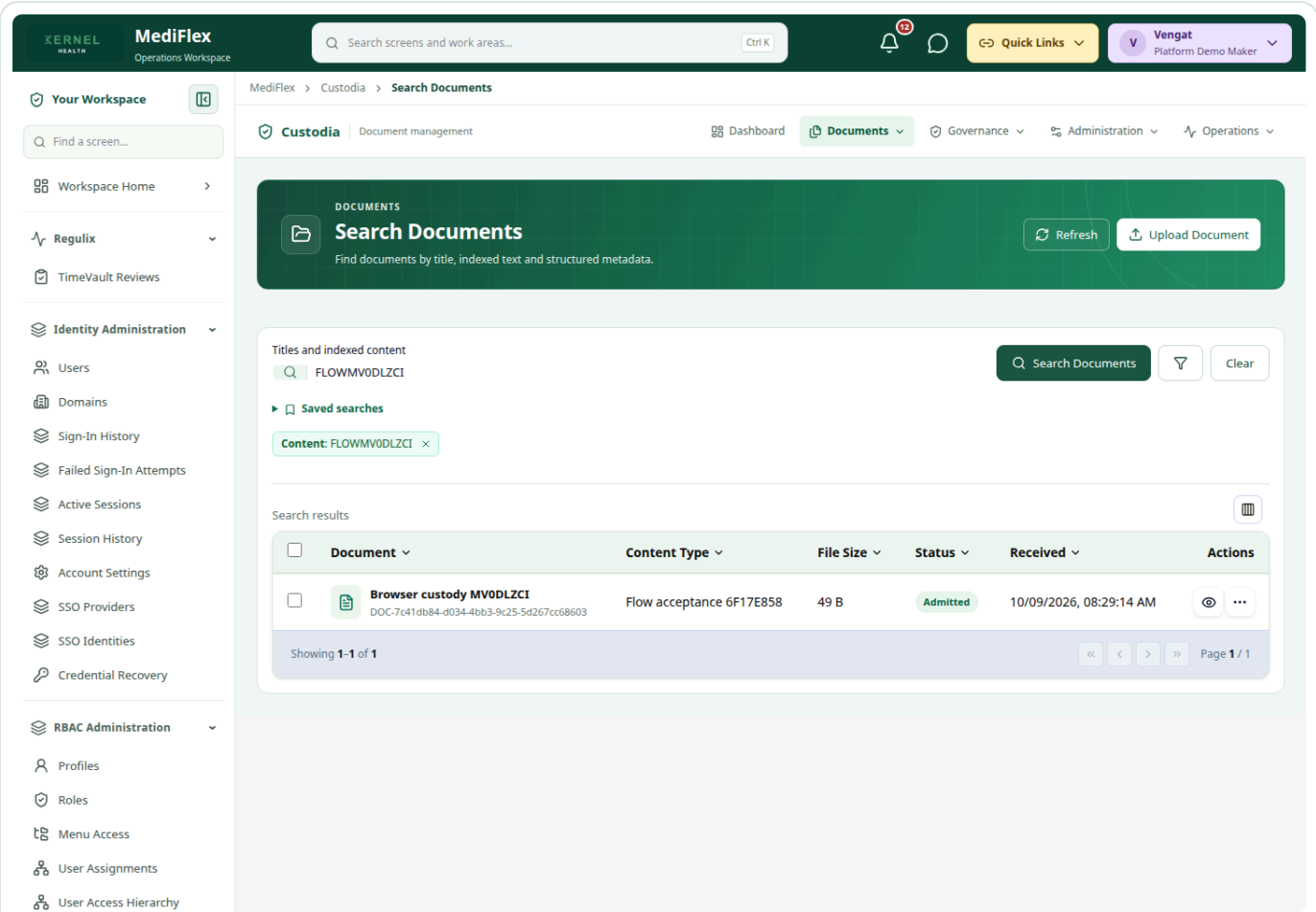
Steps and field guidance

Use the library for document records and Content search for supported extracted text, facets and metadata filters. The current source/version must be admitted, accessible and indexed where required.

1. Enter a meaningful search term and apply the relevant class, file type and metadata filters.
2. Inspect result count, facets and paging. Counts are calculated after access checks.
3. Open a result and confirm its version and context before using its content.
4. If no result is found, clear filters and check current admission/index status; ask the owner to investigate only after confirming scope.
5. Save the search definition if offered. Give it a recognizable name and reuse it from your saved definitions.
6. Rerun a saved search to obtain current authorized results. It stores criteria, not a frozen copy of all documents.

Expected result

Search returns permitted current results and does not expose denied metadata through facets or counts.



SCREEN 5

Content search following document processing.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 23

Additional demonstration · Step 8 · Collections, system collections and document relationships

Before you act	Required context
Screen / entry	Collections, inspect or create an authorized collection and choose its permitted parent when applicable.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Collections organize documents. Relationships connect a document to another document or a public business reference. Neither grants content access.

1. Open Collections, inspect or create an authorized collection and choose its permitted parent when applicable.
2. Use Collection membership to add eligible documents. Inspect membership before removing an unintended association.
3. Use System collections for computed views such as admitted, awaiting admission or your checked-out documents. These views do not accept manual membership edits.
4. Open the document's Relationships tab to create a permitted typed link.
5. For a document target, select the eligible target and inspect its version/provenance. For an external reference, supply the owning application, object type and public reference required by the form.
6. Verify the saved relationship and its history. Retire a wrong link through the offered action rather than altering the target document.

Expected result

Organization and provenance links remain visible while each underlying document retains its own permissions.

External reference capture does not certify that a remote record exists. Relationship-type authoring, broader cross-owner collection policy and configurable system-collection lifecycle remain outside the confirmed flow. System-collection previews are bounded; use the library for broader search.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 24

Additional demonstration · Share and independently review documents

Use this route when you need to share and independently review documents.

1. Request and review controlled sharing
2. Use Shared with me as a recipient
3. Complete independent review and follow corrections

CHAPTER 25

Additional demonstration · Step 1 · Request and review controlled sharing

Before you act	Required context
Screen / entry	Request and review controlled sharing
Who acts	Authorized operator / reviewer
You need	Prepare a synthetic document with no personal information, an eligible content class/metadata configuration and authorized capture/reviewer identities. Confirm current processing services before promising a preview or download. Use a recipient you control for sharing demonstrations and a prepared non-destructive record for retention/hold explanations.

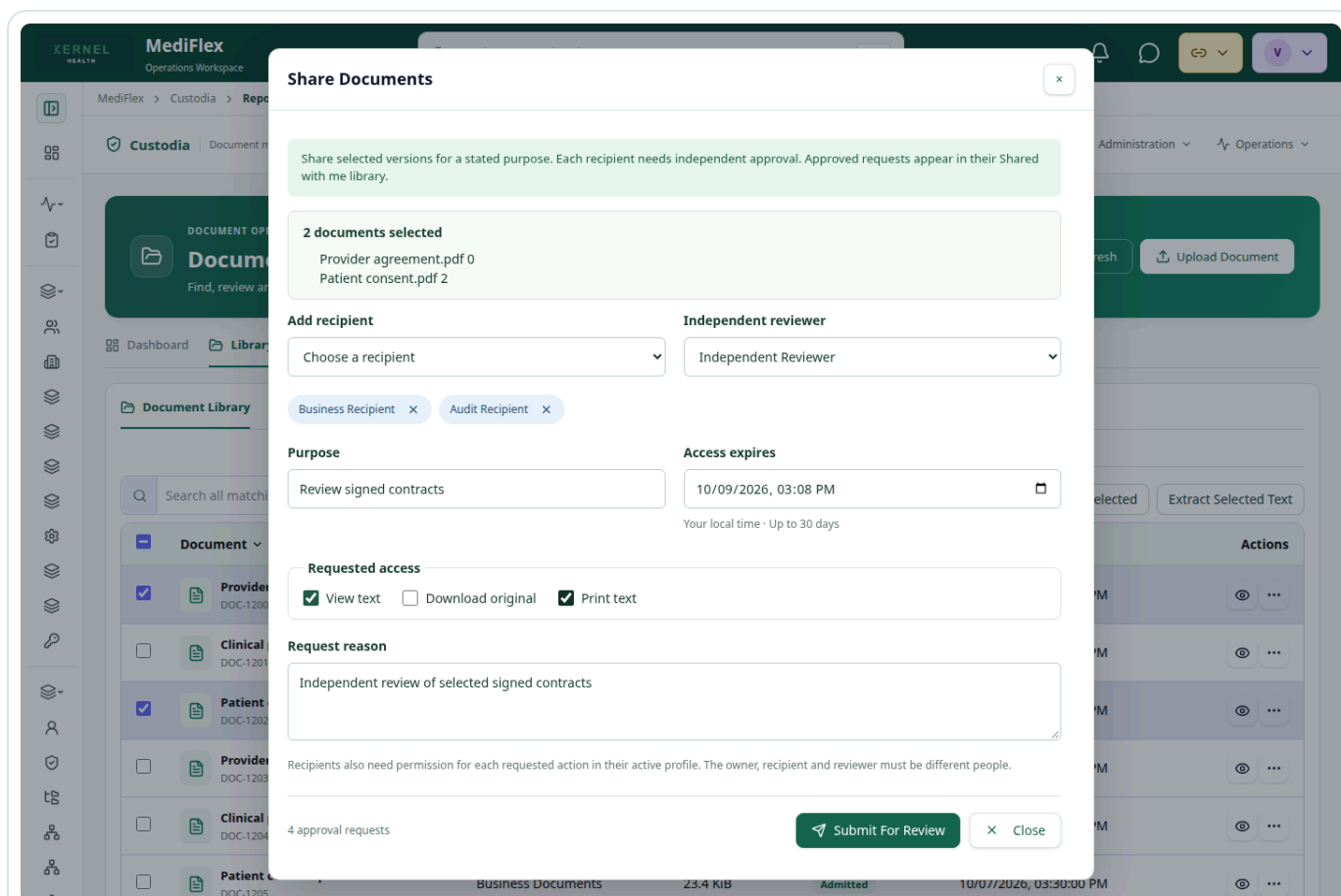
Steps and field guidance

Sharing creates internal recipient grants for selected admitted versions. It does not send an outbound email/fax or grant every recipient all document actions.

1. Select the document/version and open Request shared access, or select eligible library rows and choose Share documents.
2. Choose the recipient and an eligible independent reviewer. Owner, recipient and reviewer independence rules still apply.
3. Enter the retrieval purpose, expiry with timezone or the displayed local-time control, allowed actions and any usage limit.
4. For a batch, inspect every document/recipient pair. The recorded bounds are 20 documents, 10 recipients and at most 50 approval pairs.
5. Submit for review. Record the per-pair results and retry only failed eligible pairs; successful requests must not be duplicated.
6. The reviewer opens Access grant reviews, inspects version, purpose, recipient, actions and expiry and records the offered decision.
7. After approval, confirm the grant in Shared access and have the recipient inspect Shared with me.
8. When the purpose ends, use Revoke shared access or allow the grant to expire. Retain its history.

Expected result

Only approved, current grants expose the permitted version and actions to the intended recipient.



SCREEN 6

Bounded sharing: selected documents, recipients, purpose, expiry and requested actions.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 26

Additional demonstration · Step 2 · Use Shared with me as a recipient

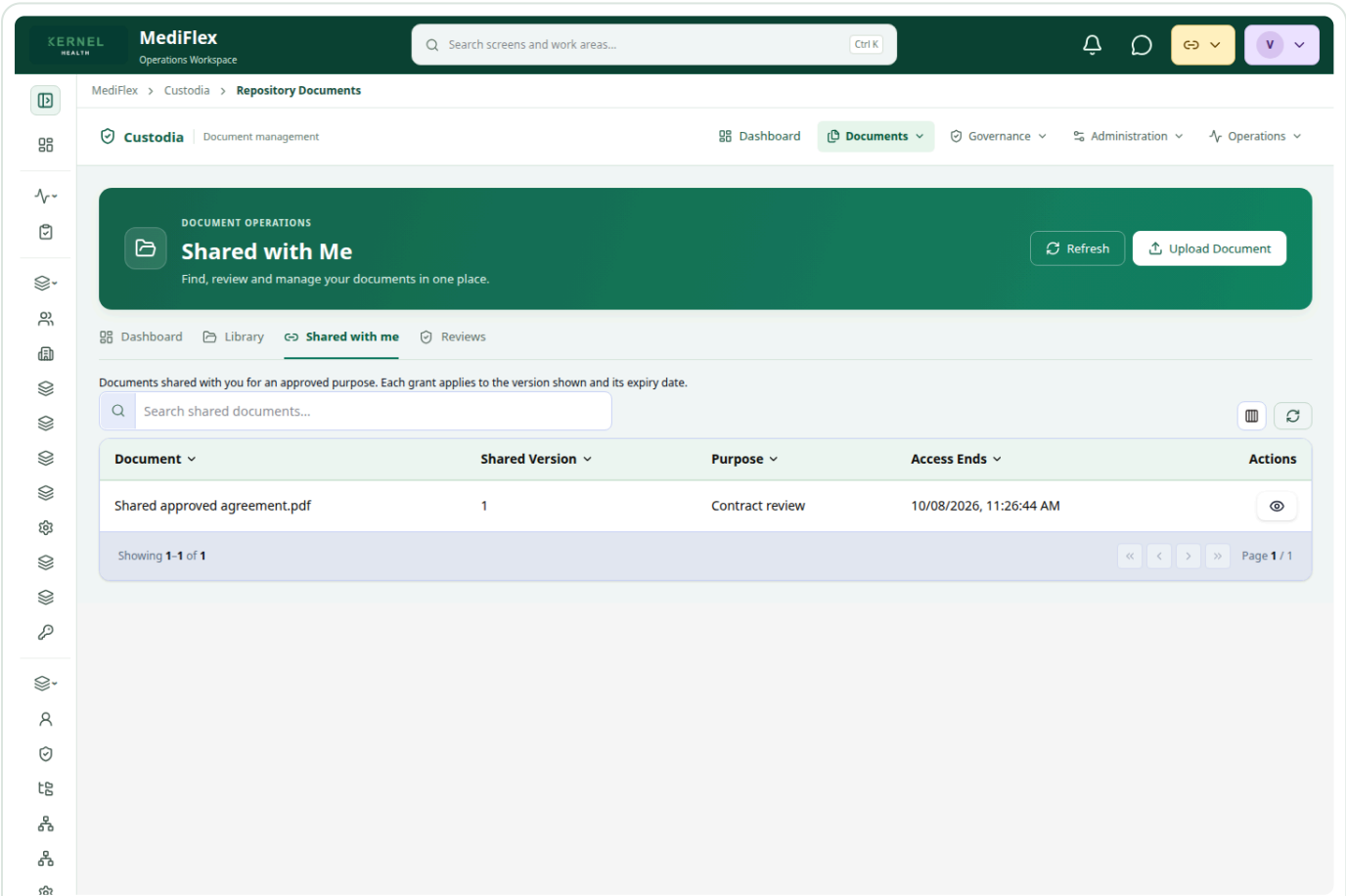
Before you act	Required context
Screen / entry	Shared with me / Shared documents and locate the grant by its document and purpose.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

The recipient must have both an eligible grant and the necessary current IAM action access. Changing profile or an expired grant can change what appears.

1. Sign in as the actual recipient and select the intended domain/profile.
2. Open Shared with me / Shared documents and locate the grant by its document and purpose.
3. Check the exact version, expiry and permitted actions before opening it.
4. Use only the offered view, print or original download action. A view-only grant should not provide original download.
5. If the item disappears or becomes unavailable, ask the owner to check revocation, expiry, usage limits, current classification and recipient identity.
6. For a different version or extended purpose, request a new governed grant rather than passing an old viewer URL to another person.

Expected result
Recipient access follows current authority and preserves the scope originally reviewed.



SCREEN 7

Shared document workspace for the current recipient.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 27

Additional demonstration · Step 3 · Complete independent review and follow corrections

Before you act	Required context
Screen / entry	the exact task
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

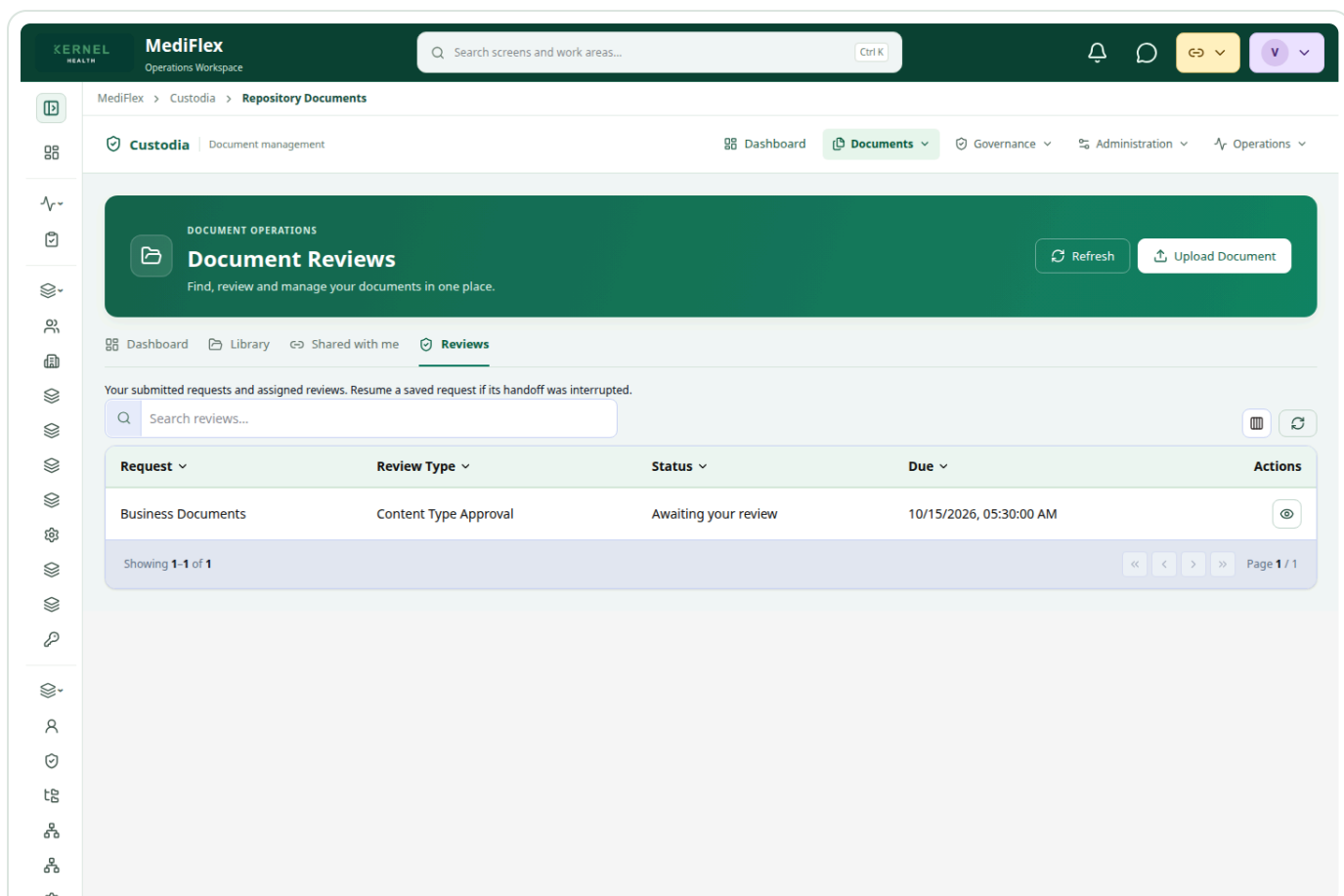
Steps and field guidance

Review queues group pending governance work. The current record and task determine whether you may decide. Seeing the review page does not make every task eligible.

1. Select the reviewer profile and open the relevant review queue or the originating record’s review action.
2. Open the exact task. Read requester, object/version, proposed change, reason, scope and current workflow stage.
3. Inspect the supporting document or configuration through the authorized context. A task assignment does not automatically grant unrestricted document content.
4. Use only the decision options offered for that family. Enter a clear reason, especially when returning or rejecting.
5. Submit once and wait for a confirmed result. If the result is uncertain, use the offered recovery or refresh the same task.
6. Return to the originating record and confirm its state/effective values. Approval may enable a separate execution action rather than execute it.
7. If the source changed, refresh and obtain a new exact review as required. Do not reuse an earlier decision for changed scope.

Expected result
The decision is attributable to an eligible independent actor and the reviewed version.

New review instances use the configured native Regulix definitions; existing instances can remain pinned to their original workflow. Reassignment/deadline changes require their own permitted routing action.



SCREEN 8

Review queue with current tasks and their available decisions.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 28

Additional demonstration · Manage retention and preservation

Use this route when you need to manage retention and preservation.

Retention, disposition and archive disposal are separate governed operations. Use an explicitly approved disposable example record for destructive actions and respect active holds.

1. Apply a retention schedule and inspect obligations
2. Create and release a legal hold
3. Event-based retention and future policy changes
4. Review and execute document disposition

Additional demonstration · Step 1 · Apply a retention schedule and inspect obligations

Before you act	Required context
Screen / entry	Retention schedules and inspect or request the appropriate duration/trigger policy.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Prepare a synthetic document with no personal information, an eligible content class/metadata configuration and authorized capture/reviewer identities. Confirm current processing services before promising a preview or download. Use a recipient you control for sharing demonstrations and a prepared non-destructive record for retention/hold explanations.

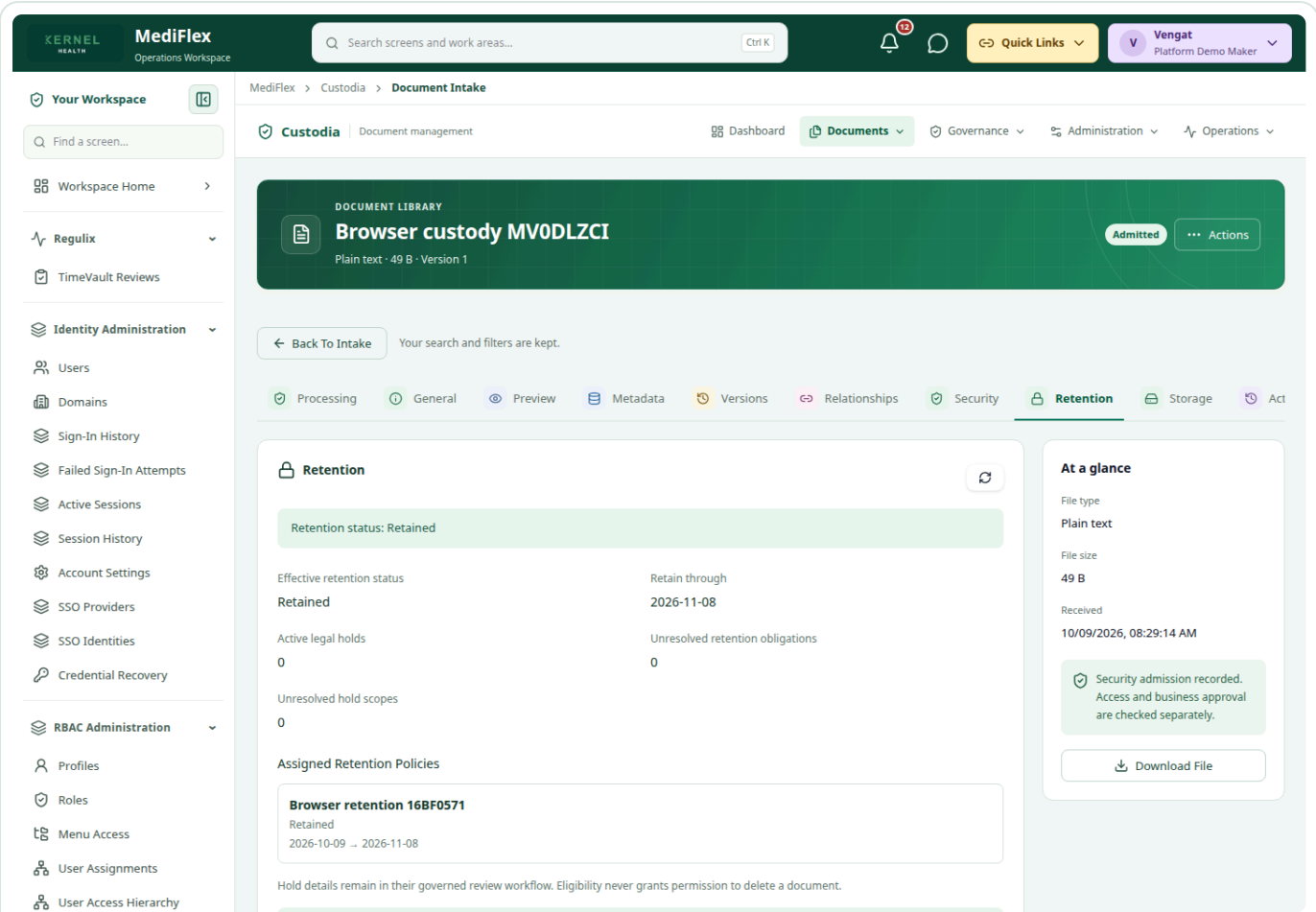
Steps and field guidance

Retention governs how long a document must be preserved. The approved schedule, document assignment, triggering event and legal holds have separate records.

1. Open Retention schedules and inspect or request the appropriate duration/trigger policy.
2. Choose the required independent reviewer and complete the request/review process.
3. Open the document's Retention tab and use Assign retention schedule / the permitted binding action.
4. Select the approved schedule and confirm the document and business reason.
5. Inspect the resulting obligation, due date and state. Event-triggered schedules may remain pending without a due date.
6. Use Retention calendar and Hold and retention reviews for the applicable follow-up.
7. Before any disposition, inspect all active obligations; a shorter new schedule does not erase a longer existing obligation.

Expected result

The document's current retention context explains what must be preserved and what evidence controls its due date.



SCREEN 9

Document retention after a contextual assignment.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 30

Additional demonstration · Step 2 · Create and release a legal hold

Before you act	Required context
Screen / entry	the document's Retention context or Legal holds and inspect existing overlapping holds.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

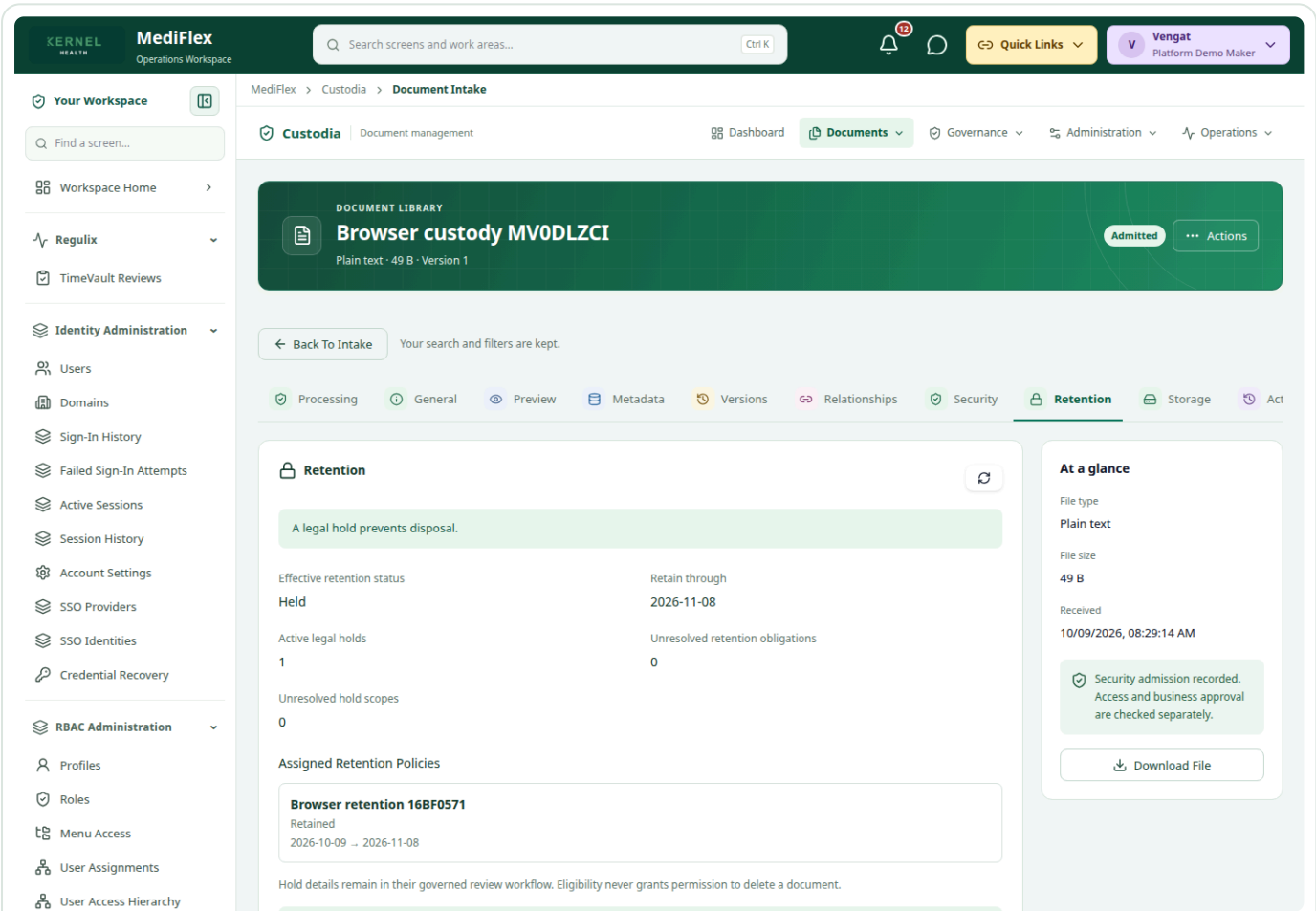
Steps and field guidance

A hold protects scoped content from disposal. Pending activation/release can remain protective. A release does not destroy content or remove other obligations.

1. Open the document's Retention context or Legal holds and inspect existing overlapping holds.
2. Use Create legal hold with the intended scope, reason and required review information.
3. Submit and inspect the hold/task state. Confirm the protective effect in the document context.
4. When the owner authorizes release, use Request hold release with the reason and independent reviewer.
5. The reviewer checks the exact hold and scope and records the eligible decision.
6. Refresh the document and confirm whether other holds or retention obligations remain.

Expected result

Hold history is retained and disposal eligibility is recalculated from all current obligations.



SCREEN 10

Held document and its preservation context.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 31

Additional demonstration · Step 3 · Event-based retention and future policy changes

Before you act	Required context
Screen / entry	Event-based retention and future policy changes
Who acts	Authorized operator / reviewer
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

An event-triggered assignment cannot start its due-date calculation until its business event is verified. Policy succession changes future assignment choices, not the duration of a prior bound obligation.

1. Create/select an approved event-based policy and bind it to the document.
2. In Retention calendar, locate the pending event and submit the real past/current UTC event date plus evidence reference.
3. The independent reviewer opens Retention event reviews, verifies the event owner/code, evidence and proposed due date and records the decision.
4. Inspect the resulting calendar and obligation. Reject incorrect evidence and submit a corrected request through the supported flow.
5. For a changed policy, use Request retention successor or retirement and obtain the required independent decision.
6. If a successor is future-dated, confirm both the currently effective policy and the scheduled version. Existing assignments keep their recorded policy.

Expected result
Verified events and approved policy versions explain retention dates without shortening existing obligations.

The evidence reference is for reviewer verification; it does not establish an authenticated external event integration. Future event dates, duplicate open event tasks and stale review scope can be rejected.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 32

Additional demonstration · Step 4 · Review and execute document disposition

Before you act	Required context
Screen / entry	Disposition readiness and inspect the selected document's current blockers, retention, holds, versions, exports and archive copies.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Use this flow only for content that the records owner has actually authorized for disposal. Verify it with disposable training content. Document destruction, export-package disposal and archive-copy disposal are distinct scopes.

1. Open Disposition readiness and inspect the selected document's current blockers, retention, holds, versions, exports and archive copies.
2. Request disposition with the intended scope, independent reviewer and business reason.
3. The reviewer opens Disposition reviews and checks current evidence and eligibility before deciding.
4. After approval, open Disposition requests and use the separately authorized execution action only when offered.
5. Read and enter the exact confirmation required by the form. Verify identity and scope before confirming.
6. Inspect the execution receipt/certificate and activity. An approved request alone is not proof of deletion.
7. For interrupted execution, use the saved request's Resume action. Preserve a blocked reservation for operator investigation.

Expected result
Canonical completion and its receipt identify the actual disposed scope; history remains available.

A missing storage file by itself is not a valid destruction receipt. Do not manually remove objects or use inactive flags to evade a hold or disposal process.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 33

Additional demonstration · Export and archive governed content

Use this route when you need to export and archive governed content.

Retention, disposition and archive disposal are separate governed operations. Use an explicitly approved disposable example record for destructive actions and respect active holds.

- 1. Build, review and download a governed export
- 2. Revoke, recover and dispose of an export package
- 3. Transfer a package into the configured archive
- 4. Request and use archive retrieval
- 5. Dispose of an archive copy

CHAPTER 34

Additional demonstration · Step 1 · Build, review and download a governed export

Before you act	Required context
Screen / entry	Build, review and download a governed export
Who acts	Authorized operator / reviewer
You need	Prepare a synthetic document with no personal information, an eligible content class/metadata configuration and authorized capture/reviewer identities. Confirm current processing services before promising a preview or download. Use a recipient you control for sharing demonstrations and a prepared non-destructive record for retention/hold explanations.

Steps and field guidance

Use Governed exports or the library's eligible export action. Decide whether the recipient needs original files or rendered redacted pages before submitting the package for review.

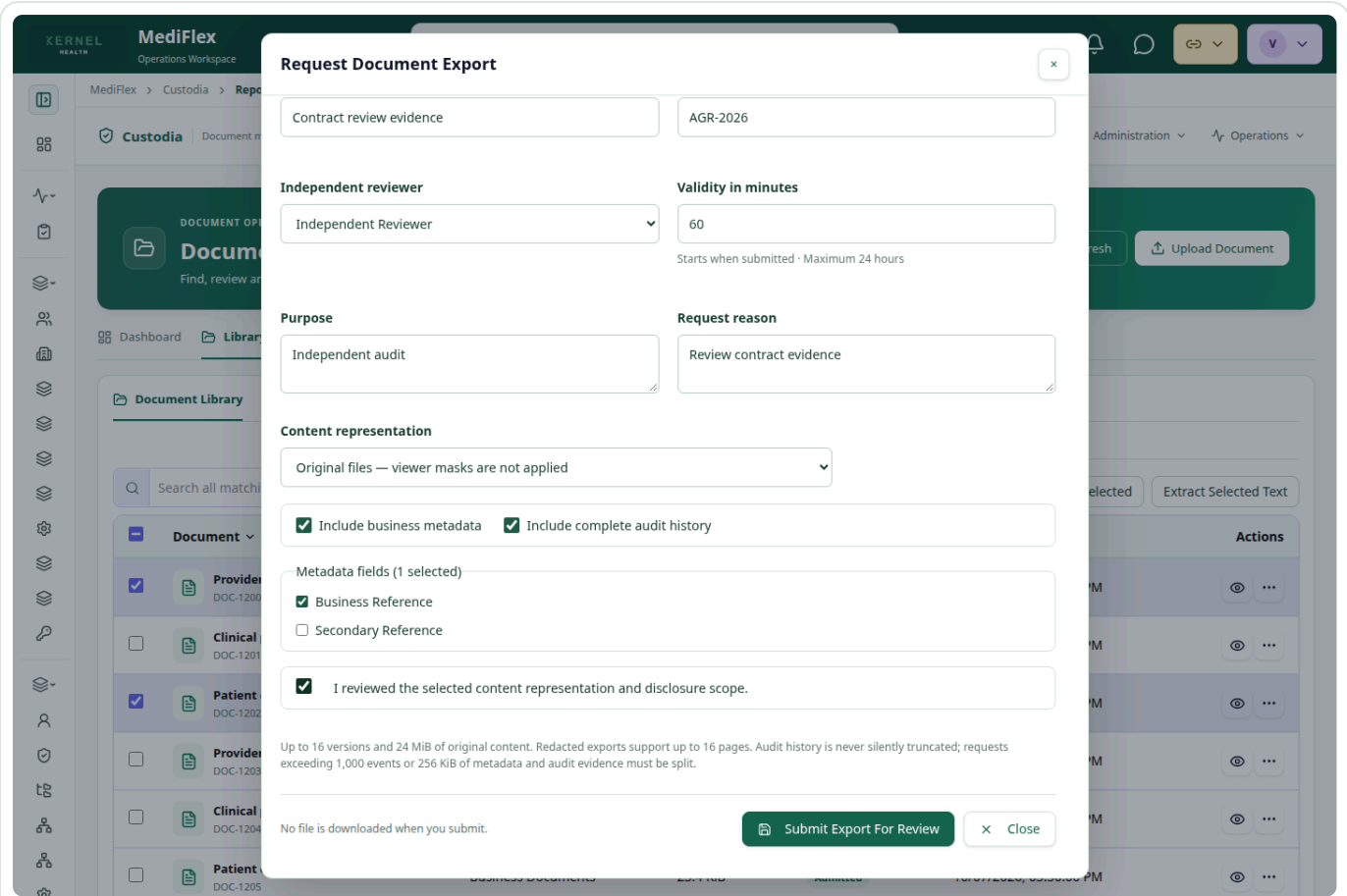
- 1. Select exact eligible document versions and choose the supported representation.

2. Enter purpose and the required review/validity information. Select permitted business metadata fields and audit supplements as needed.
3. Inspect the snapshot scope and limits. The recorded newer export supports up to 16 versions, 24 MiB original bytes, a 256 KiB manifest, 1,000 audit events and at most 16 redacted pages; representation-specific runtime limits also apply.
4. Submit the request. The reviewer opens Export reviews and inspects the exact manifest, representation, fields, purpose and expiry.
5. After approval, use Execute governed export / the available generation action and wait for verified package status.
6. Download through the current authorized action and inspect package identity/checksums and included evidence.
7. If blocked by changed access, redactions or scope, create the required fresh request after resolving the change. Retry does not make stale approval valid.

Expected result

The package is tied to the reviewed snapshot and current release checks; oversized scope fails rather than silently omitting evidence.

Redacted output uses rendered pages and approved masks; original output preserves originals. Private annotations and free-text redaction reasons are not ordinary disclosure supplements. Audit scope is the available history through the request snapshot, not future activity.



SCREEN 11

Governed export scope and selectable supplements.

Illustrative application screen · select to enlarge.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 35

Additional demonstration · Step 2 · Revoke, recover and dispose of an export package

Before you act	Required context
Screen / entry	Revoke, recover and dispose of an export package
Who acts	Authorized operator / reviewer
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Export revocation stops future authorized release. It does not recall downloaded copies. Package disposal removes the specified derived package, not its source documents.

1. Inspect the export state and use Revoke export package when its authority must end.
2. For a recoverable generation interruption, use Resume export generation / the offered recovery action on that same request.
3. For disposal, open Export package disposal and request the eligible revoked/expired package's removal.
4. The independent reviewer uses Package disposal reviews and checks current source obligations, holds and package identity.
5. Before execution, inspect the current approval and enter DELETE EXPORT PACKAGE only for the intended training/authorized package.
6. Use Resume package deletion after an interruption when offered. Cancellation is available before execution, subject to current state.
7. Verify the package destruction certificate and retained source-document history.

Expected result

The certificate identifies local derived-export-package scope. Originals, backups and downloaded copies are not claimed erased.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 36

Additional demonstration · Step 3 · Transfer a package into the configured archive

Before you act	Required context
Screen / entry	Archive transfers and choose the eligible approved, packaged and unrevoked export.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

The implemented local archive accepts an eligible governed package. External archive destinations require separate provider configuration and acceptance.

- 1. Open Archive transfers and choose the eligible approved, packaged and unrevoked export.
- 2. Select the available configured destination, enter purpose and required review information, and submit.
- 3. The independent reviewer checks destination, package identity, representation and manifest in Archive transfer reviews.
- 4. After approval, use the separately authorized execution action and its displayed confirmation.
- 5. Wait for the transfer acknowledgement and integrity result. Inspect the recorded destination and package checksum.
- 6. If transfer is interrupted, use Resume archive transfer on the same request. Do not create another destination copy merely because the response was lost.

Expected result
An accepted archive copy and its acknowledgement are recorded. The source document and export package remain separate objects.

An archive copy can remain a blocker for source destruction until its own governed disposal is completed. Transfer is not an instruction to remove originals.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 37

Additional demonstration · Step 4 · Request and use archive retrieval

Before you act	Required context
Screen / entry	the accepted transfer and choose Request archive retrieval.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Retrieval needs fresh authority for the accepted archive copy. The implementation described here serves the archive requester; it is not arbitrary cross-owner distribution.

- 1. Open the accepted transfer and choose Request archive retrieval.
- 2. Enter the new purpose and validity shown by the form; the recorded range is 1–1,440 minutes.

- 3. Have the separate reviewer inspect Archive retrieval reviews, including source manifest, representation, checksum, purpose and expiry.
- 4. Open Archive retrievals after approval and use the verified ZIP download.
- 5. If cancelled, expired or blocked by current source access/redaction changes, resolve that authority before requesting another download.
- 6. Inspect retrieval activity and retain the archive identity with any downloaded copy.

Expected result
Release is read from the archive and verified against its recorded acknowledgement and current authority.

A fresh eligible archive retrieval can remain possible after its source export expires/revokes. Cancellation prevents new releases; already downloaded copies cannot be recalled.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 38

Additional demonstration · Step 5 · Dispose of an archive copy

Before you act	Required context
Screen / entry	Archive copy disposal and, when authorized and eligible, enter DELETE ARCHIVE COPY to execute.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

Archive-copy disposal is distinct from deleting the source export or original document. Check every obligation and any open retrieval authority first.

- 1. Select the accepted transfer and choose Request archive disposal.
- 2. Inspect the exact archive object and request scope; submit with the required reason and independent reviewer.
- 3. The reviewer opens Archive disposal reviews and checks holds, retention, source access and any pending or approved retrieval.

- 4. Cancel or allow conflicting retrieval authority to expire through its normal flow before disposal can proceed.
- 5. Open Archive copy disposal and, when authorized and eligible, enter DELETE ARCHIVE COPY to execute.
- 6. Use Resume archive deletion for an interrupted reserved operation. Cancellation is limited to the pre-execution state.
- 7. Verify the archive disposal certificate and retained acknowledgement/history.

Expected result

The certificate covers the specific local archive copy. Original documents, export packages, backups and previously downloaded copies are outside that scope.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 39

Additional demonstration · Recover processing and storage issues

Use this route when you need to recover processing and storage issues.

- 1. Processing operations, retries and bounded batches
- 2. Storage, investigations, scans and orphan packages

CHAPTER 40

Additional demonstration · Step 1 · Processing operations, retries and bounded batches

Before you act	Required context
Screen / entry	the workspace corresponding to the failed stage and inspect document/version, request reference, reason and last attempt.
Who acts	Authorized operator / eligible independent reviewer as specified below
You need	Prepare a synthetic document with no personal information, an eligible content class/metadata configuration and authorized capture/reviewer identities. Confirm current processing services before promising a preview or download. Use a recipient you control for sharing demonstrations and a prepared non-destructive record for retention/hold explanations.

Steps and field guidance

Operations workspaces separate Upload processing, Admission processing and Text processing. Their outcomes must not be treated as interchangeable.

1. Open the workspace corresponding to the failed stage and inspect document/version, request reference, reason and last attempt.
2. Correct the supported cause, such as a missing required value or an available scanner/extractor configuration.
3. Use the offered scan/extract/retry action for eligible records. In a batch, select no more than the displayed supported limit (recorded processing bound: 20).
4. Keep the browser/session open. Pause stops after the current item rather than cancelling a completed storage operation.
5. Inspect completed, blocked and failed items separately. Retry eligible failed work without repeating successful commands.
6. Return to Document processing and refresh stages to verify the outcome.
7. Escalate unknown or unsupported failures with the correlation/request reference, version and time.

Expected result
Recovery retains receipts and history and does not bypass admission or owner policy.

These browser batches are not proof of unattended Scheduler execution. Durable delegated quarantine/index recovery, replacement-file recovery and physical index repair remain broader recorded work.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

CHAPTER 41

Additional demonstration · Step 2 · Storage, investigations, scans and orphan packages

Before you act	Required context
Screen / entry	the selected document's Storage tab to inspect its recorded objects, integrity and relevant actions.
Who acts	Authorized operator / eligible independent reviewer as specified below

Before you act	Required context
You need	Complete the previous step in this route, or reopen its eligible saved record. Confirm the same scope and revision.

Steps and field guidance

The document Storage tab shows custody context. Tenant-level Storage investigations and Storage scan history are operator surfaces. An investigation note cannot authorize deletion.

1. Open the selected document's Storage tab to inspect its recorded objects, integrity and relevant actions.
2. For an operational finding, open Storage investigations and select its case. Check observed namespace/object identity, current state and latest scan.
3. Inspect Storage scan history to understand the observation window and counts. A later clean observation can mark a finding No longer observed without erasing history.
4. Record a review note with the current evidence and intended follow-up; keep the note factual.
5. Use Verified orphan packages only for eligible verified derived packages and their governed remediation/disposal flow.
6. Retain unknown or changed objects for investigation. Escalate cases that cannot be resolved through a permitted action.
7. After a supported corrective operation, use the next authorized scan/observation to verify the result.

Expected result
Findings, notes and observations remain auditable. Neither a note nor an absent file is a deletion authorization.

The recorded scan recorder is an operator-run process, not a universal self-service Scan button. Recent UI lists are bounded; older persisted history may require operator retrieval. Do not claim unattended cleanup or physical backup sanitization from these screens.

Keep the record number and version, any preview/decision/output reference, and the observed result. If the expected result is missing, stop this route and use the recovery chapter; a visible button alone is not completion.

Cross-module handoffs and the record references to retain

Next module	What to carry across	Open the related demonstration
MEDES	Pass admitted document/version and explicit business context into case evidence.	MEDES
Pulse	Track the generated-output handoff independently of content publication.	Pulse
IAM	Recipient grants, document access and allowed actions remain checked.	IAM

CHAPTER 43

Problem → responsible action → safe continuation

Procedure	Observed problem	Recovery
Configure the content type, metadata and capture template	A field or type is absent	Inspect review/effective state and the selected class.
Configure the content type, metadata and capture template	A schema is revised after documents exist	Inspect impact on current validation rather than assuming historical versions were rewritten.
Upload and resolve the document's processing stages	The queue pauses	Inspect the active file result; pausing prevents further admission and does not undo accepted uploads.
Upload and resolve the document's processing stages	The document is not searchable	Inspect validation/indexing and current version before uploading a duplicate.
Control checkout, check-in and exact-version review	The file changed while review was pending	Reload and review the applicable current version; stale decisions should not authorize new bytes.
Control checkout, check-in and exact-version review	Checkout is held by another person	Use the supported owner/recovery action rather than circumventing the lease.
Review bounded sharing and exact-version redaction	The document version or mask changed	Obtain the required new review/export authority before disclosure.
Review bounded sharing and exact-version redaction	A recipient cannot open the file	Inspect grant decision, expiry, version access and admission; a copied link is not a grant.
Inspect retention and legal holds before disposition	A hold blocks disposal	Keep the blocker and use the legal/records owner's release process if justified.
Inspect retention and legal holds before disposition	Execution is interrupted	Resume the saved request when offered rather than creating unrelated deletion work.

Procedure	Observed problem	Recovery
Generate an approved export and track archive retrieval	Access, masks or source scope changed	Resolve the change and obtain the required fresh request; retry does not make stale review valid.
Generate an approved export and track archive retrieval	A package is revoked	Future authorized release ends, but earlier downloaded copies are not recalled.

CHAPTER 44

Close the demonstration and hand over the operating guide

Return to the final owning record and show its actual result. Retain the exact references for creation, decision, publication, execution and output that this module produced. Explain any unresolved dependency as a specific blocker; do not convert a source-level example into a claim of a completed hosted journey.

Procedure	Evidence the audience should have seen
Configure the content type, metadata and capture template	Show type policy, typed required fields and the capture form generated from that schema.
Upload and resolve the document's processing stages	Show per-file upload result and the first unresolved/resolved processing stage.
Control checkout, check-in and exact-version review	Show checkout owner, new version, exact-version decision and preserved prior history.
Review bounded sharing and exact-version redaction	Show exact version, bounded recipient grant, independent redaction decision and rendered mask.
Inspect retention and legal holds before disposition	Show a hold/retention blocker and disposition readiness; execute destruction only in the separately authorized disposable rehearsal.
Generate an approved export and track archive retrieval	Show reviewed manifest, generated checksum, release state and any separate archive receipt.

Keep the training data and audit trail until the agreed review is complete. Use only supported inactivation/retirement actions when authorized; do not erase evidence to reset the demonstration. Hand over the separate user manual for daily operation and record actual results in the UAT pack.