



Illustration: Ajith Vallath Prabhakar. Case B below is fictitious: names, records, roles, dates and transition terms are invented for this internal-policy example.

WORKED EXAMPLE / WHY THE OLDER VERSION APPLIES

The latest version is not automatically the applicable one. This transition uses the purchase-order opening date, not the review date. Other actions may have different governing rules.

CASE B RECORD	ILLUSTRATIVE EVIDENCE
Scope / owner	Entity B, Location B; purchasing; Policy Lead.
Controlling event	PO-B opened 20 Jun 2026; reviewed 10 Jul 2026.
Transition	v2 effective 1 Jul 2026; earlier orders retain v1.
Source evidence	Policy v2, clause T1; Policy Lead confirms scope.
Approval condition	10 Jul: PO review approved only if scope/state unchanged.

Outcome: v1 applies to this PO review under clause T1. Scope changes on 11 July before action: hold for renewed review. Revalidate policy, state and authority. Missing transition evidence also means hold; selecting a version does not grant action permission.

Record why this version applies

Printable worksheet. Identify the rule for one proposed action and its scope. Record the controlling event separately from when an update was published or checked.

1 DEFINE THE CASE AND THE CONTROLLING EVENT

Case / proposed action

Owner / review date

Entity / activity / location or jurisdiction, where relevant

Controlling event / date / authority for choosing that event

2 COMPARE THE CANDIDATE VERSIONS

SOURCE / VERSION / OWNER

ISSUED / EFFECTIVE / CHECKED

SCOPE / TRANSITION

3 RECORD APPLICABILITY AND THE GRANT CONDITION

Applied version / reason / evidence reference, or unresolved conflict

Permitted action / approval record / conditions / expiry, if any

4 REVALIDATE BEFORE ACTION

Changed since approval: policy / amount / state / identity / scope

Proceed / renew approval / hold: reason / resolver / next review trigger

Test: retrieve the newest policy for a case covered by an older transition. Does the applicable version survive? Remove the transition evidence: does the workflow hold for review?