



Data Store User Guide

Adding Versions

This section shows how you, as the reference owner, can point a reference to a newer version of the reference.

When to Add Versions

Use versioning if the information resource is NPS material (i.e., created for/by the NPS), and if there are newer finalized updates, whether incremental or cumulative.¹ Versioning adds clarity to the lineage of information and ensures that users are aware of any changes through time. Despite the concern that older versions of information may no longer be useful or could cause confusion, from a legal standpoint access to all versions is essential.

More Specific Rules around Versioning

In addition to the general rules described in the 'Introduction to Reference Links' module, the following rules apply:

- To successfully link two references as versions, you must be the owner of both. Once linked, there is no requirement for you to maintain that ownership.
- Only certain reference types can be versioned.
- Certain combinations of references types cannot be versioned. For instance, a geospatial dataset can be a newer version of a vector dataset (or vice versa). However, a published report cannot be a newer version of a geospatial dataset (or vice versa).
- Once a reference is designated as an older version, it can no longer be edited.² This is intentional from a legal perspective.
- To point to a newer version, both the older and the newer versions of the reference must be active.

Adding Versions

From the reference edit screen, the Version History tab should be visible. If this tab is not visible, then this particular Reference Type is not allowed to be versioned (e.g., journal article).

¹ Versioning is strictly about the information resource, not about the version of the reference (metadata).

² Also note that any edits done to the older reference before versioning must first be saved!

This tab contains the existing version history (if it already exists) and the option to add a new version. In the Image 1 below, there is no version history.

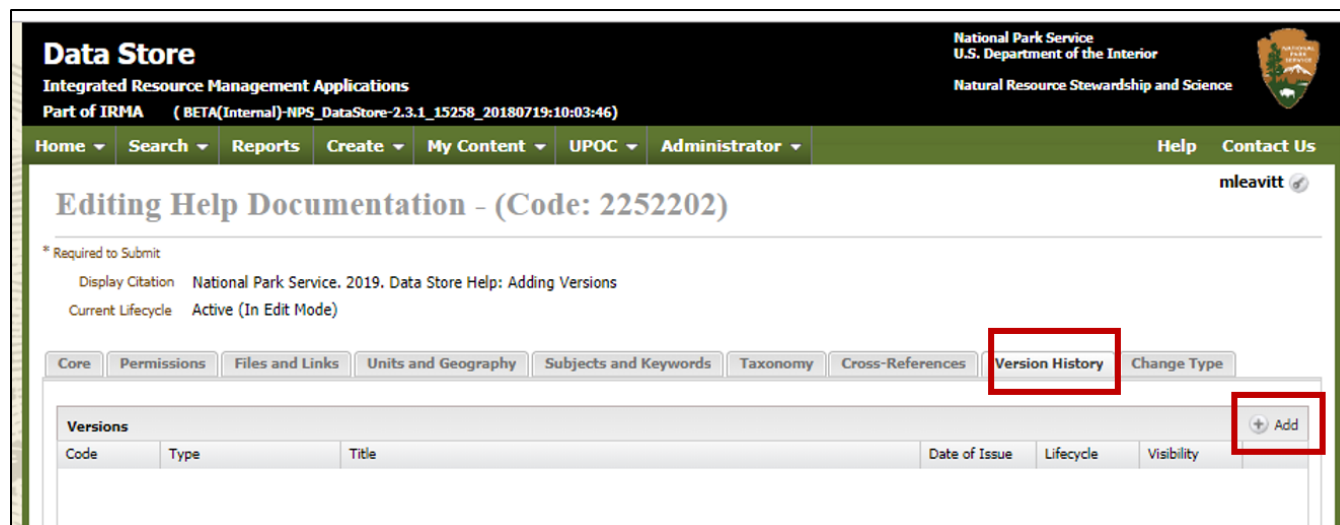


Image 1: Version History tab.

There are two ways to add a newer version.

1. Clone a reference to create a new version.
2. Select an existing reference to designate as a newer version.

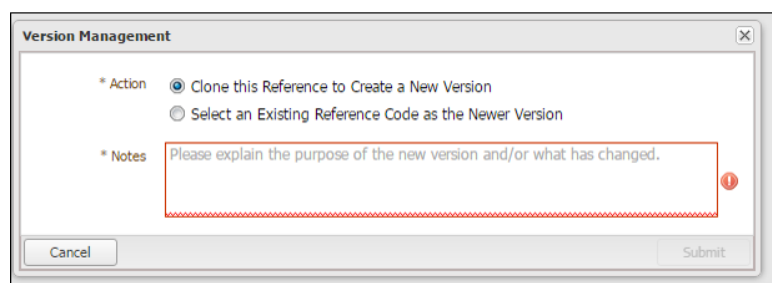


Image 2: Version Management

You are required to indicate, in the notes field, why a new version has been added.

Add a New Version by Cloning

This is the most common way to add new versions and is an easy process to follow.

Clone the reference to create a new version. This process follows the same rules as cloning but automatically adds the existing set of owners. You are then taken right to the edit screen of the new reference, where you can edit as necessary and add the files or links of the new version.

Add New Version by Selecting an Existing Reference Code

A second option is to point to an existing active reference in the Data Store.

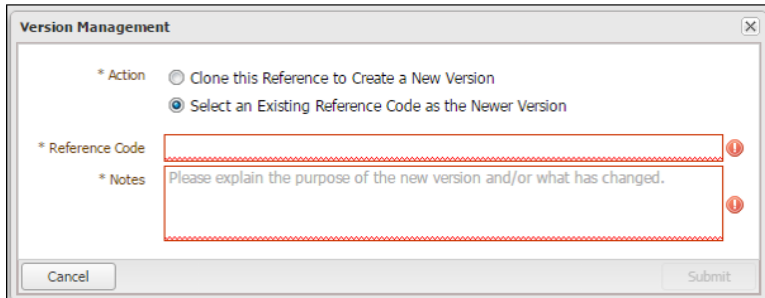
A dialog box titled "Version Management" with a close button (X) in the top right corner. It contains three sections: "* Action" with two radio buttons, the first of which is selected; "* Reference Code" with a text input field; and "* Notes" with a larger text area. Below these fields are "Cancel" and "Submit" buttons. Red dashed boxes highlight the "Reference Code" and "Notes" fields, each with a red exclamation mark icon to its right.

Image 3: Actions menu under version management.

Once you enter the reference code, notes, and click the Submit button, the reference profile of the older version will open. Note the message that displays prominently.

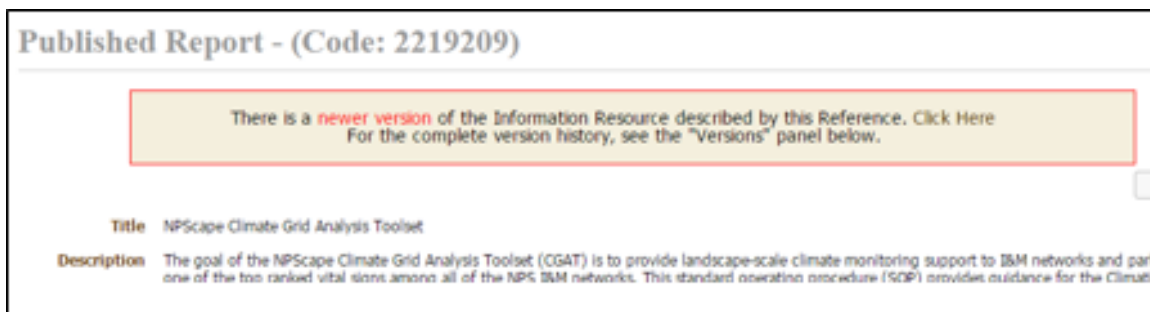
A web page titled "Published Report - (Code: 2219209)". A yellow notification box with a red border contains the text: "There is a **newer version** of the Information Resource described by this Reference. Click Here For the complete version history, see the 'Versions' panel below." Below the notification, the page shows the "Title" as "NPScape Climate Grid Analysis Toolset" and a "Description" starting with "The goal of the NPScape Climate Grid Analysis Toolset (CGAT) is to provide landscape-scale climate monitoring support to IBM networks and part one of the top ranked vital signs among all of the NPS IBM networks. This standard operating procedure (SOP) provides guidance for the Climate".

Image 4: Newer version notification panel.

Un-Versioning

Except in rare instances, older versions should not be removed. Older versions are essential pieces of information that must be preserved so our management of information is traceable and transparent.³ In rare cases where un-versioning is needed (e.g., references were linked accidentally), edit the older version and break the link.

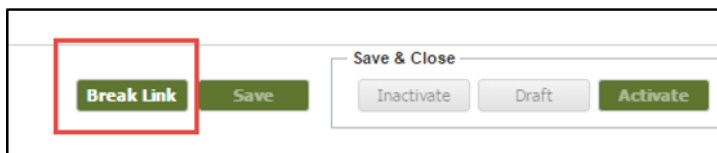
A screenshot of a web interface showing a "Break Link" button highlighted with a red rectangle. To its right is a "Save" button. Further right is a "Save & Close" section containing "Inactivate", "Draft", and "Activate" buttons.

Image 5: Break Link button.

³ Be aware too that older versions are never returned in the Quick Search (See *Search Technical Documentation* module).