How To Version References

This document provides information about which reference types can be versioned, and the step by step guide for versioning a reference.

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Rules to Version a Reference

- Only certain reference types can be versioned. The option to version a reference is available only on reference types that can be versioned.
- Certain combinations of reference 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). For a list of which reference types can be a newer version of an existing reference type, see Table 1 below.
- You must own the reference you are attempting to version.
- Any edits done to the original (older) reference must be saved first.
- When versioning a reference by selecting an existing reference, you must own both references. Once linked, you are not required to maintain ownership.

Reference Type combinations that can be Versioned

Only certain reference types can be versioned. Series reference types, such as report series, map series, and container reference types, such as program and journal issue, cannot be versioned. Certain combinations of reference types can be versioned, and others may not. The supported reference type version combination is listed in the table below.

References Versioned from	*Reference Versioned to*
Aerial Photograph	Aerial Photograph
Brochure	Brochure
Compliance Document	Compliance Document
Data Package	Data Package
Data Release Report	Data Release Report Published Report
Data Standard	Data Standard Published Report
Docket	Docket
Generic Dataset	Data Package Generic DataSet Geospatial DataSet Raster DataSet Relational Database Tabular DataSet Vector DataSet
Generic Document	Generic Document Help Documentation Unpublished Report
Geospatial DataSet	Data Package Geospatial DataSet Vector DataSet
Help Documentation	Help Documentation
Imagery	Imagery
Journal Article	Journal Article
Lidar Image	Lidar Image
Map	Map
Movie/Video	Movie/Video
Newsletter Article	Newsletter Article
Plan	Plan Published Report
Photogrammetry Assemblage	Photogrammetry Assemblage
Photogrammetry Image	Photogrammetry Image
Poster	Poster
Project Summary	Project Summary Published Report
Protocol Narrative	Protocol Narrative Published Report

References Versioned from	*Reference Versioned to*
Protocol Development Summary	Protocol Narrative Protocol Development Summary Published Report
Published Report	Generic Document Published Report Unpublished Report
Raster DataSet	Raster DataSet
Relational Database	Relational Database Data Package Geospatial Database
Resource Brief	Published Report Resource Brief
Resource Guide	Resource Guide
Satellite Image	Satellite Image
Script	Script Software
Software	Script Software
Standard	Standard
Standard Operating Procedure	Published Report Standard Operating Procedure
Tabular DataSet	Data Package Tabular DataSet
Technical Assistance Report	Technical Assistance Report Published Report
Unpublished Report	Published Report Unpublished Report Generic Document
Vector DataSet	Data Package Geospatial DataSet Vector DataSet

Table 1 Combination of reference types allowed to be versioned

Ways to Version a Reference

To version a reference, you must be owner of the reference, and the reference type must be allowed to be versioned. From the reference edit page, the Version History tab will be visible if the reference type can be versioned. If Version History tab is not visible, then the Reference Type does not allow versioning (e.g., journal article).

The Version History tab contains the existing version history (if it already exists) and the option to add a new version. The image below has several versions, with the most current version listed first.

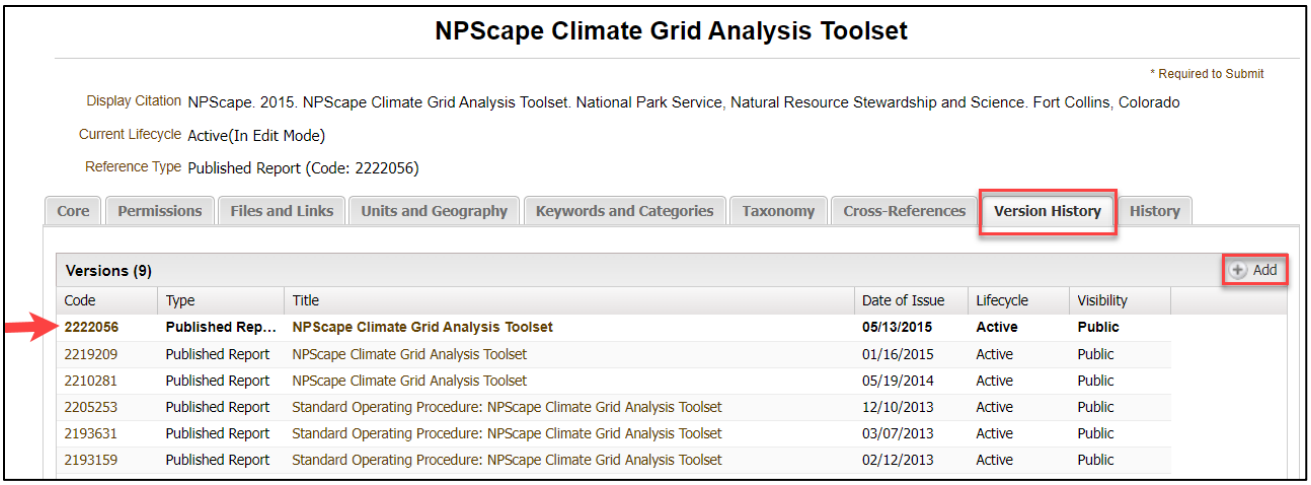


Image 1 Version History tab on the reference edit page

There are two ways to add a newer version.

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

The selection **Clone this Reference to create a new version** is the most common way to version a reference. Make this selection when an existing reference has not been created, and most of your metadata for the reference will be the same as your previous version.

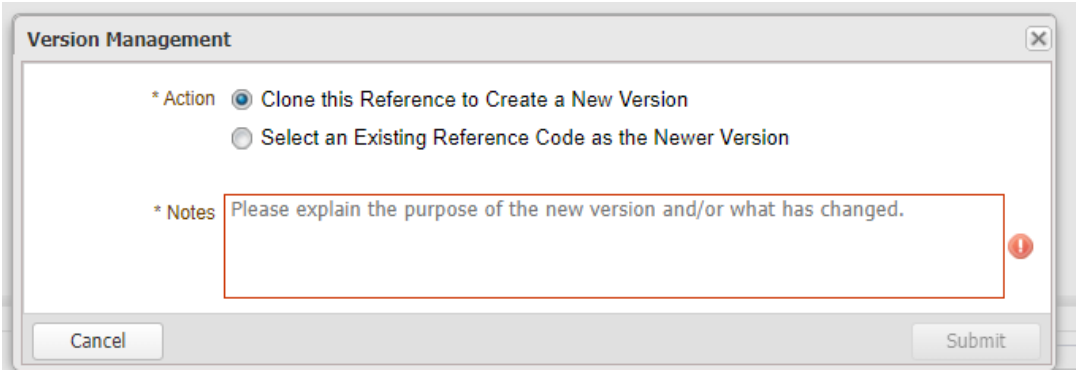


Image 2 Add Version - Version Management dialog

Select an existing reference when there is an existing reference that needs to be added as a version to a reference, then version the reference by choosing the “Select an Existing Reference Code as the Newer Version”

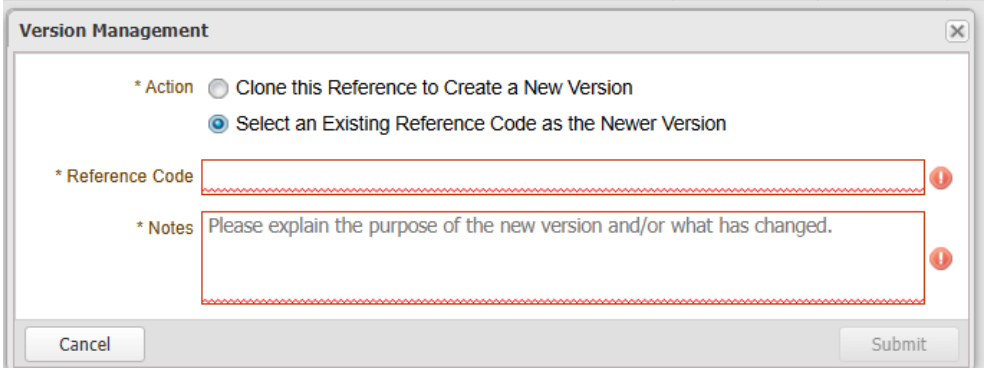


Image 3 Select an existing reference code as the newer version

How to Add a Version by Cloning

When you select Clone the reference to create a new version of the current reference most of the fields will be copied from the existing reference to the new reference. Fields that are not copied are the Publisher or Issue Date, and the digital files or external links. The title, description, and most of the other fields from the tabs will be copied. To get a complete list of fields that are copied over when cloning see the bottom of this document.

Below are the steps to **Add a Version by Cloning**

Step 1. Click the Add button in the section header.

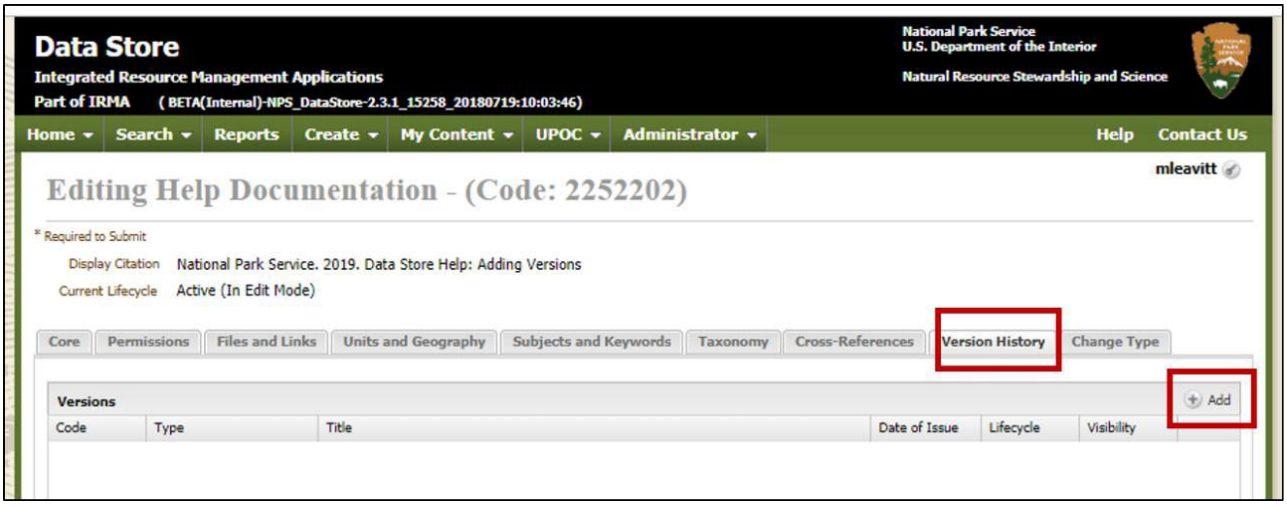


Image 4 Version History Tab

Step 2. The Warning message displays, notifying you that you cannot edit older references. Click Yes button to continue.

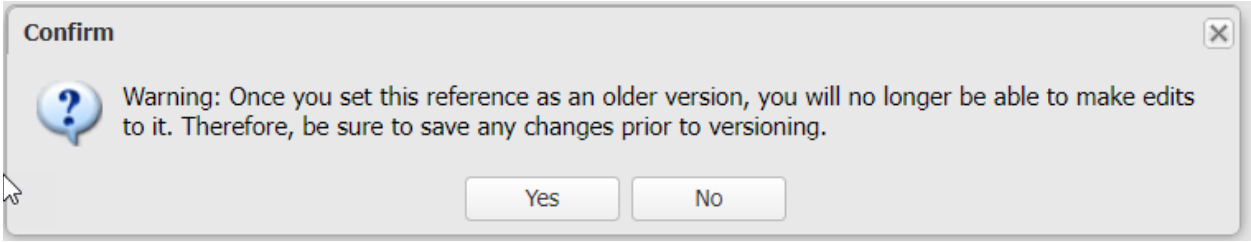


Image 5 Version warning confirmation dialog

Step 3. Select the Action "**Clone this Reference to Create a New Version**" and add notes, and Click Submit button

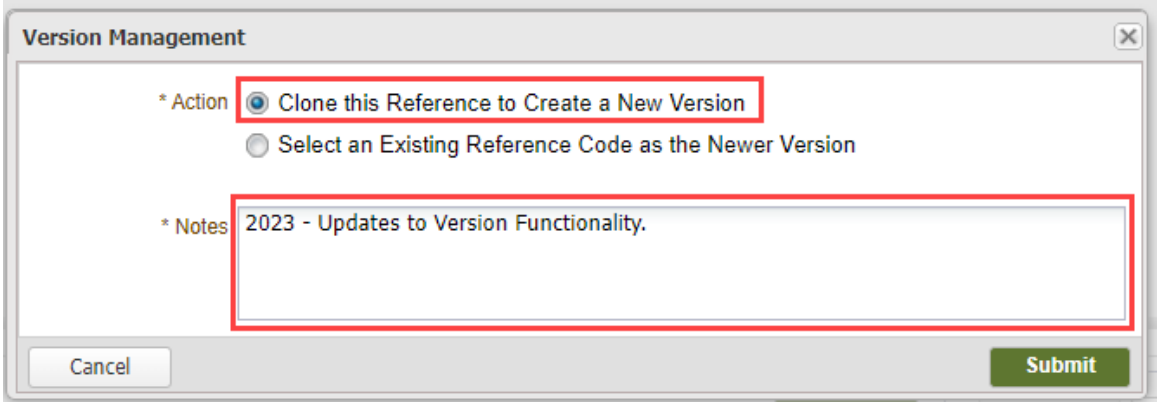


Image 6 Add Version by "Clone this Reference to Create a New Version dialog

Step 4. You are navigated to the new version's edit reference page. The Current Lifecycle field displays the reference is in Draft (In Edit Mode). The fields that are not copied over, such as the Date Published field, will need to be edited.

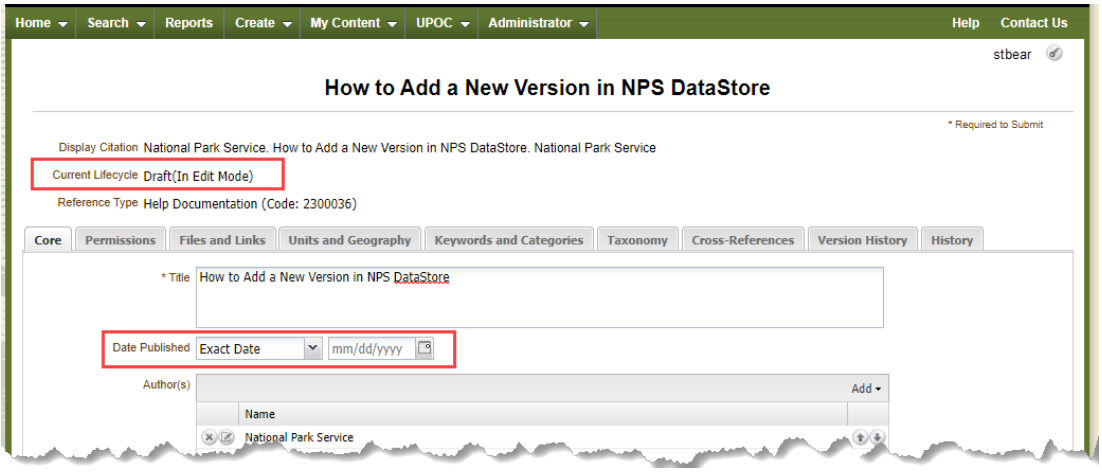


Image 7 Edit the new version of the reference

Step 5. Once you have made all the changes to the reference, and activate the reference you will be navigated to the most current version of the reference. Notice the Version section is collapsed. Once expanded, you will see the version history list.

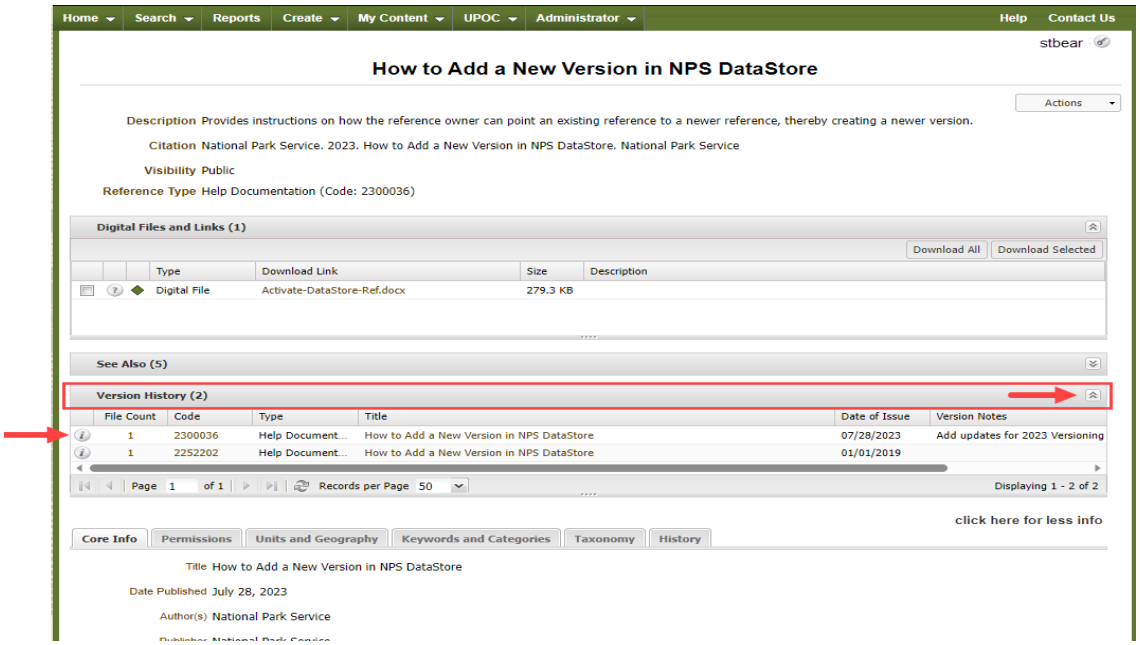


Image 8. Current Version Reference Profile page with Version History expanded.

List of Fields Copied when Reference is Versioned by Cloning

Below is the list of the fields that are copied when versioning a reference via cloning.

- Title
- Creators (Contact1)
- Editor (Contact 2)
- Steward (Contact 3)
- Publisher
- Location
- Content Begin Date
- Content End Date Description
- Licensing information
- Metadata Standard
- Reference Owners
- Reference and File Access Level
- Additional Use Constraints
- Editable by Data Steward flag
- Geography (Producing and Content Units)
- Keywords
- Vocabularies
- Taxonomy Tab

- Taxonomic Records for Reference (not Taxonomic records extracted through the EML process)
- Cross Reference Tab (also known as the See Also section)

Add New Version by Selecting an Existing Reference Code

A second option is to point to an existing active reference in the DataStore. You should make this selection if you have an existing reference that needs to be set as the most current version of another reference.

Step 1. Click the Add button in the section header.

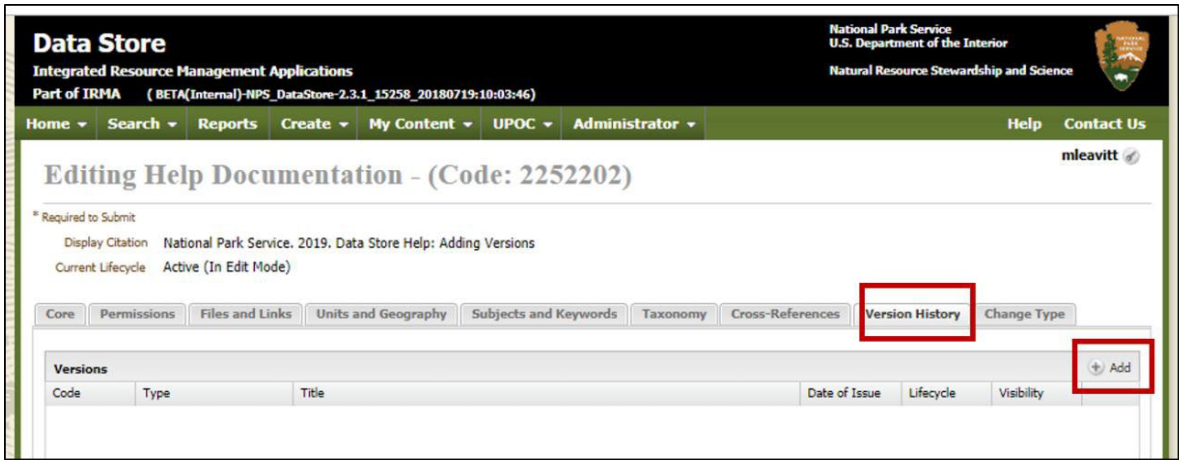


Image 9 Version History Tab

Step 2. The Warning message displays notifying you that you cannot edit older references. Click Yes button to continue.

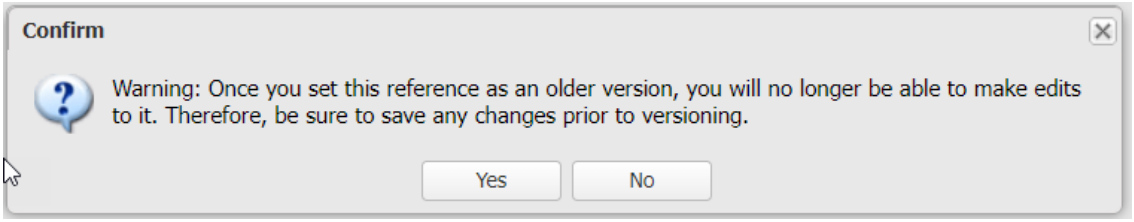


Image 10 Warning Message that you will not be able to edit older versions

Step 3. Click the "Select an Existing Reference Code as the Newer Version" radio button, add the reference code that will be the most current reference version, and include a note of why it will be versioned. Click Submit.

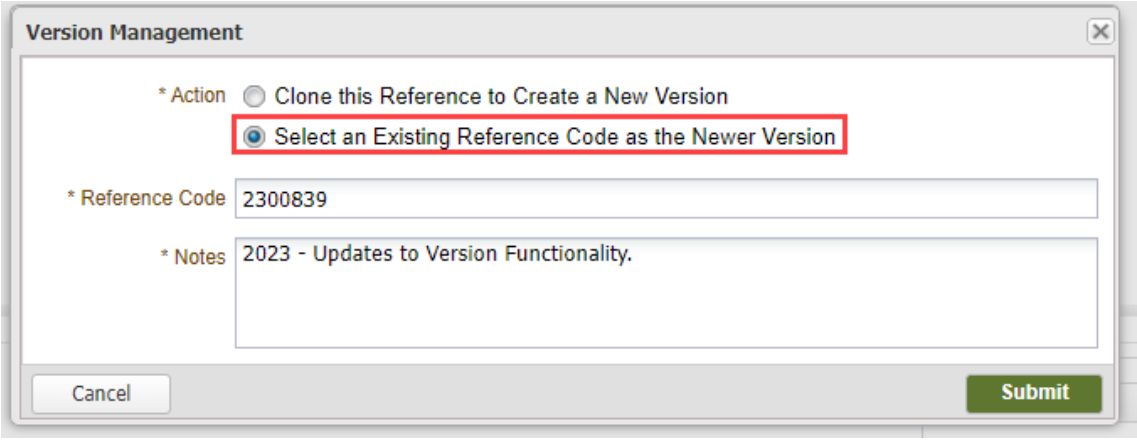


Image 11: Actions menu under version management.

Step 4. You will be navigated to the older version reference profile page. A message indicating this reference has been versioned and a link to the new version prominently displays.

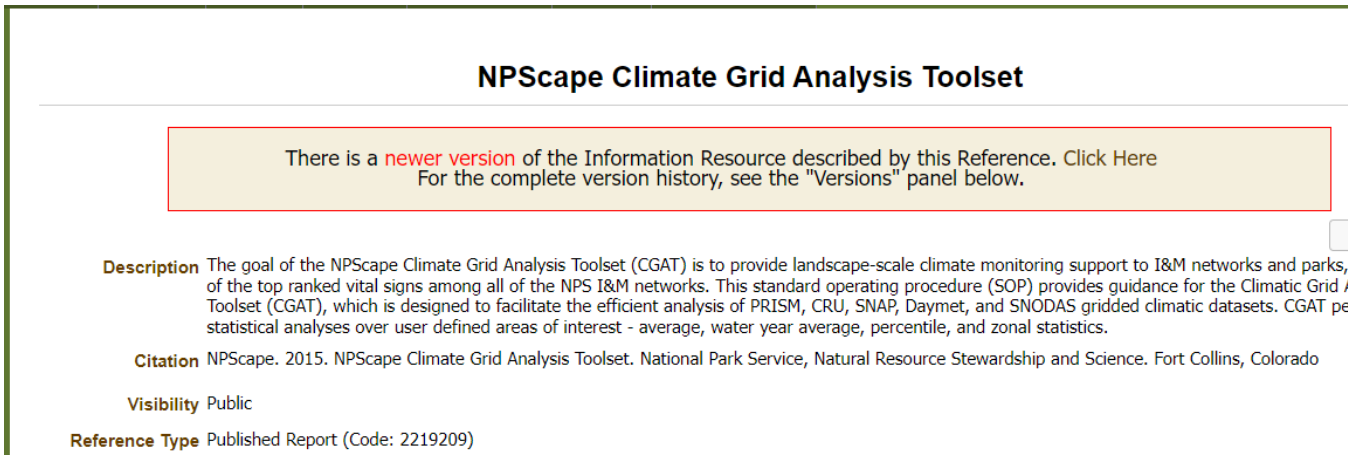


Image 12: Newer version notification panel.

Rules that Apply after a Reference is Versioned

- Once a reference is designated as an older version, it can no longer be edited. This is intentional from a legal perspective.
- Once references are linked, you are not required to maintain ownership. As the reference owner, you may change ownership of a versioned reference from the menu item **My Content | Batch Management of Ownership**.
- Quick Search returns only the current version of the reference.

- By default, the Advanced Search returns the current version of a reference. To return older versions of a reference, users must select the “Show all versions” radio button from the Version search option on the Advanced Search page.

Un-Versioning a reference

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. In rare cases where un-versioning is needed (e.g., references were linked accidentally), edit the older version and break the link.

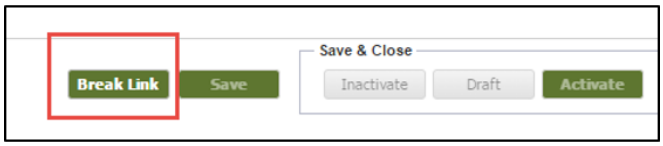


Image 13: Break Link button.

Viewing Older Versions of a Reference

When accessing the older version reference profile page, a message indicating this reference has been versioned and a link to the new version prominently displays.

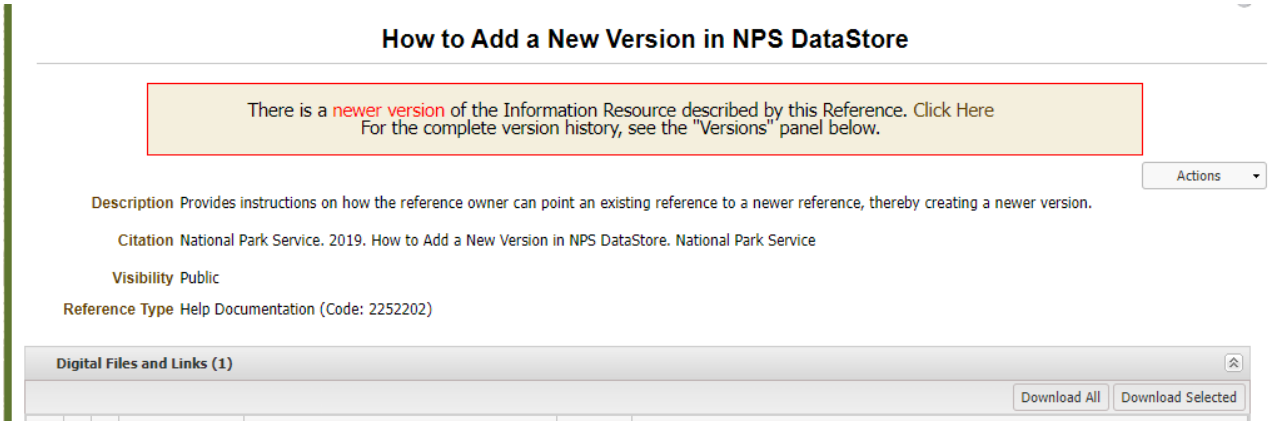


Image 14. Older Version of Reference Warning Message

Searching Older Versions of References

The Quick Search will not return older versions of a reference. Only the most current version will be in the quick search results.

On the Advanced Search, the default is to display only the most recent version. To return search results for older versions of a reference, expand the Versions search option on the Advanced Search page, and click the Show all versions radio button.



Image 15. Advanced Search page Versions search option section