



# Adding Versions

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Illustrates how the Reference owner can point a Reference to a newer version of the information resource in another reference.

## When to Add Versions

Versioning should be used if the information resource is FWS material (i.e., created for/by the FWS) and there are newer finalized updates, whether incremental or cumulative.<sup>1</sup> 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 are no longer useful and could cause confusion, it is critical from a legal standpoint that they are maintained (essential for transparency).

For certain reference types in ServCat (e.g., datasets), it is entirely reasonable to version.

## More Specific Rules around Versioning

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

- To successfully link two References as versions, you must be the owner of both. Once linked, there is no requirement to maintain that ownership.
- Only certain Reference Types may be versioned.
- Certain combinations of References Types may not be versioned. For instance, it is acceptable that a geospatial dataset is a newer version of a vector dataset (or vice versa). However, published report cannot be a newer version of a geospatial dataset (or vice versa).
- Once a Reference is set to an older version, it may no longer be edited.<sup>2</sup> This is intentional from a legal perspective.
- To point to a newer version, the older version of the Reference must be active.
- If you point to an existing version, that too must be active.

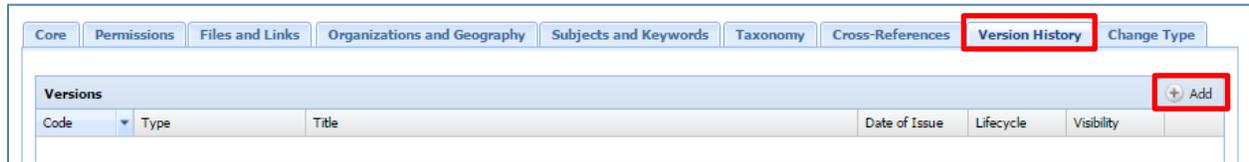
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<sup>1</sup> To be clear, versioning is strictly about the information resource, not about the version of the reference (metadata).

<sup>2</sup> Also note that any edits done to the reference prior to versioning must first be saved!

## Adding Versions

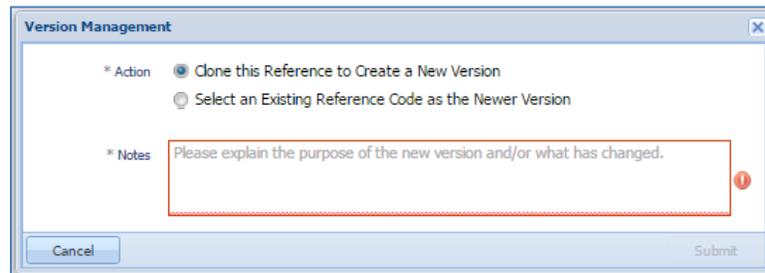
From the Reference edit screen, the Versions tab should be visible. If this tab is not visible, then this particular Reference Type is not allowed to be versioned (e.g., journal article).



On that tab is a table containing the existing version history (if it already exists) and the option to add a new version.

There are two ways to add a newer version.

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



Regardless of the method used, you are required to indicate why a new version has been added in the Notes field. If there is no other documentation in the existing information resources to track version changes, it is essential that it be done here.

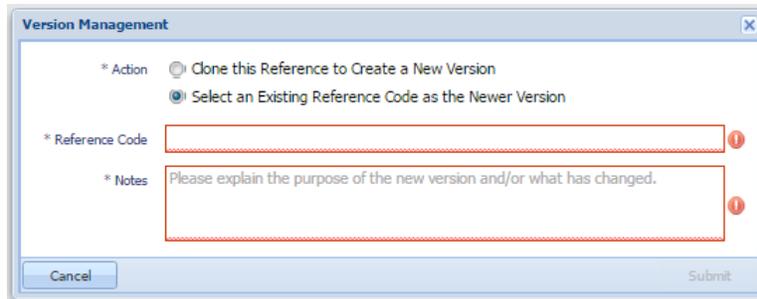
### Add a New Version by Cloning

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. Users are immediately taken to the edit screen of the new Reference where it can be edited and appropriate files/links can be added.

### Add New Version by Selecting an Existing Reference Code

A second option is to point to an existing active Reference in ServCat.



The image shows a 'Version Management' dialog box with the following fields and options:

- \* Action:** Two radio buttons. The first is 'Clone this Reference to Create a New Version' (unselected). The second is 'Select an Existing Reference Code as the Newer Version' (selected).
- \* Reference Code:** A text input field with a red border and a red information icon on the right.
- \* Notes:** A text area with a red border and a red information icon on the right. The placeholder text reads: 'Please explain the purpose of the new version and/or what has changed.'
- Buttons:** 'Cancel' and 'Submit' buttons at the bottom.

Once the Reference Code and Notes are entered and the Submit button is clicked, the Reference profile of the older version will open. Note the message that displays prominently.

**Plan - (Code: 5940)**

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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.

Actions ▾

**Title** Draft Comprehensive Conservation Plan and Environmental Impact Statement: Charles M. Russell National Wildlife Refuge, UL Bend National Wildlife Refuge

**Description** The U.S. Fish and Wildlife Service (Service) has developed this draft comprehensive conservation plan and environmental impact statement to provide alternatives and identify consequences for the management and use of the Charles M. Russell National Wildlife Refuge and the UL Bend National Wildlife Refuge. The CCP outlines issues, concerns and opportunities expressed to the Service during extensive public scoping meetings. Tribal governments, governmental agencies, non-governmental organizations, business, and private citizens contributed substantial input to the plan. Topics addressed in this plan include; wildlife protection, wilderness areas, visitor services, natural and cultural resources, physical environment, socioeconomic, paleontological resources, fire management, and Refuge administration.

**Full Citation** Charles M. Russell National Wildlife Refuge and U.S. Fish and Wildlife Service, Region 6, Mountain-Prairie Region, Division of Refuge Planning. 2010. Draft Comprehensive Conservation Plan and Environmental Impact Statement: Charles M. Russell National Wildlife Refuge, UL Bend National Wildlife Refuge

**Visibility** Public

[click here for more info](#)

## 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.<sup>3</sup> In rare cases where un-versioning is needed (ideally because References were linked accidentally), edit

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

the older version and break the link.

### Editing Plan - (Code: 5940)

\* Required to Submit

Display Citation Charles M. Russell National Wildlife Refuge and U.S. Fish and Wildlife Service, Region 6, Mountain-Prairie Region, Division of Refuge Planning, 2010. Draft Comprehensive Conservation Plan and Environmental Impact Statement: Charles M. Russell National Wildlife Refuge, UL Bend National Wildlife Refuge

Current Lifecycle Active (In Edit Mode)

Core Permissions Files and Links Organizations and Geography Subjects and Keywords Taxonomy Cross-References Version History

Versions (2)						+	Add
Code	Type	Title	Date of Issue	Lifecycle	Visibility		
8141	Plan	Final Comprehensive Conservation Plan and Environmental Impact Statement: Charles M...	04/01/2012	Active	Public		
5940	Plan	Draft Comprehensive Conservation Plan and Environmental Impact Statement...	09/01/2010	Active	Public		

Cancel **Break Link** Save Save & Close Inactivate Draft Activate