Corrigendum

Issued: 2010-10-01
Author: DDI Technical Implementation Committee

Purpose: The corrigendum noted below supersedes the documentation of the Technical Specification Part I and Part II of DDI_3_1_2009-10-18_Documentation_XMLSchema as noted by line number.

Background: Following discussion of the Use Cases arising from the October 2009 Expert Workshop, Dagstuhl, Germany, it was clear that there was conflicting documentation on the application of the "action" attribute used to support local overrides of inherited information in grouping. This documentation corrigendum is intended to reflect what appears to be the understood usage of this attribute. This documentation change clarifies the behavior of each value of the attribute and specific requirements of their use. Documentation changes are based on the following definitions agreed to at the 2010-09-24 meeting of the DDI Technical Implementation Committee:

Object – Any element that contains a value for the action attribute. This includes only Identifiable, Versionable, and Maintainable elements.

Property – Any element contained within an object. An element includes all contained elements and attributes.

Add – To be used when a new identifiable object is provided locally with a new identifier (one that is not inherited). All properties are as specified. If an object with an existing ID is created, this is an error.

Update – To be used when an object is provided locally with an existing inherited identifier. For each type of property that is specified locally, a full set of those properties is specified for local use. These properties replace any properties of this type which were inherited. Unspecified properties are used as inherited.

Delete – To be used when an object is provided locally with an existing inherited identifier. All properties specified locally in this object will be deleted if their types and values match those inherited.

Corrigenda for Part I – Overview

DELETE: lines 1199-1203 [partial]

1199   The attribute 'action' is used for inheritance situations in which the identified
1200   element is being added (Add) to the inherited content, updates or overrides
1201   (Update) the inherited element, or indicates that an inherited element is not being

1202   used (Delete). Elements that 'Update' or 'Delete' an inherited element will have
1203   the SAME id as the inherited element.

NO CHANGE for remainder of 1203: "The optional element UserID allows for"

ADD paragraph break

REPLACE with:

"The attribute 'action' is used for inheritance situations in which there is an override at the local level (within a grouped StudyUnit) which is not available for further inheritance. There are three possible values for 'action':

Add – A new identifiable object (an Identifiable, Versionable, or Maintainable element) is provided locally with a new identifier (one that is not inherited). All properties (elements and attributes contained in the object) of the object are as specified. If an object with an existing ID is created, this is an error.

Update – An object is provided locally with the SAME id as the inherited object. For each type of property that is specified locally, a full set of those properties is specified for local use. These properties replace any properties of this type which were inherited. Unspecified properties are used as inherited.

Delete – An object is provided locally with the SAME ID as the inherited object. All properties specified locally in this object will be deleted if their types and values match those inherited. Note that to completely delete an object at the local level, all properties of the inherited object must be listed."

ADD paragraph break before beginning of next sentence.

DELETE: lines 1945-1949

1945   Included objects can be modified at the local level with the use of Add, Update,
1946   and Delete as described in Section 3.3.1.1. Note that Updates to non-identified
1947   objects are made at the level of their parent identifiable. The updated identifiable
1948   should include the full content of the identified variable including those sections
1949   that do not differ from the original object found in the included object.

REPLACE with:

"Included objects can be modified at the local level with the use of Add, Update, and Delete as described in Section 3.3.1.1. Note that Updates to the non-identified properties of an object are made at their object (identified) parent. The object should include all instances of the changed or added property that are available for use at the local level. All unspecified property types will be inherited. "

Corrigenda for Part II – User Guide

DELETE lines 508-514

510

Element / attribute	Description of use
@id	Required identifier for the element. This MUST be unique within the parent maintainable.
@urn	An optional urn for the element. Note that if there is conflict between the id and urn content, the urn takes precedence.
UserID	An optional repeatable user defined identifier that is locally unique within its specific type. The @type points to the local user identification system that defines the values. If multiple UserIDs are entered they must be differentiated by the type attribute.
@action	Action has a controlled vocabulary of "Add", "Update", or "Delete". It is used to identify local overrides to inherited content. • *Add* – the element has a unique id and should be used in addition to the inherited elements • *Update* – the element has the ID of the inherited element which it updates (for example a local Name or label change) • *Delete* – The element has the id of the inherited element which is NOT used in the local instance (for example a ProcessingEvent was not used). Note that if the identified element is complex, the entire contents of the complex element will be considered as deleted.
@objectSource	Object Source allows the user to enter the DDI URN of an object that could be included by reference, but is being entered in-line in exact detail from its source. This feature supports distribution of non-published documentation with data extracts or archival versions where the problem of broken links or difficulties with resolution services must be avoided. It allows for the retention of the link for comparability purposes which providing the content in-line.

511
512   Note that the attribute action is used only with inherited materials. Inheritance
513   occurs with grouping. These action statements provide local overrides for the
514   current inheritance, they themselves cannot be inherited. Note that if the element
515   that contains the change is not identifiable, its parent identifiable should be
516   entered in full including the changed information.

REPLACE WITH

Element / attribute	Description of use
@id	Required identifier for the element. This MUST be unique within the parent maintainable.
@urn	An optional URN for the element. Note that if there is a conflict between the ID and URN content, the URN takes precedence.
UserID	An optional repeatable user-defined identifier that is locally unique within its specific type. The @type points to the local user identification system that defines the values. If multiple UserIDs are entered, they must be differentiated by the type attribute.
@action	Action has a controlled vocabulary of "Add", "Update", or "Delete". It is used to identify local overrides to inherited content. Action is available for all 'objects' -- any element that is Identifiable, Versionable, or Maintainable. Objects may contain a set of properties. A 'property' is any element contained within an object. An element includes all contained elements and attributes. • *Add* – A new object is provided locally with a unique identifier (one that is not inherited). All properties are as specified. If an object with an existing identifier is created, this is an error. • *Update* – An object is provided locally with an existing inherited identifier. For each type of property that is specified locally, a full set of those properties is specified for local use. These properties replace any properties of this type which were inherited. Unspecified properties are used as inherited. For example, if a VariableName on a local level is changed, list the Variable with its inherited ID, and ALL valid uses of the property VariableName. All other unspecified properties such as Label or Representation are inherited. • *Delete* – An object is provided locally with an existing inherited identifier. All properties that are specified locally will be deleted if their types and values match those inherited. To fully delete an object, all of its properties must be listed.
@objectSource	Object Source allows the user to enter the DDI URN of an object that could be included by reference, but is being entered in-line in exact detail from its source. This feature supports distribution of non-published documentation with data extracts or archival versions where the problem of broken links or difficulties with resolution services must be

	avoided. It allows for the retention of the link for comparability purposes while providing the content in-line.

Note that the attribute 'action' is used only with inherited objects. Inheritance occurs only when grouping by design. These action statements provide local overrides for the current instance, generally a study unit; they themselves cannot be inherited. Changes to properties within an object are made by listing the object with the appropriate value for action and the updated or deleted properties. Only an object can be added and it includes all of its relevant properties.'

DELETE lines 2319-2333

2319   When using inheritance within groups to show comparability – or even just to re-
2320   use metadata – it is important to understand how local overrides work, as this
2321   can impact the way the metadata is grouped. Within each group, all metadata is
2322   inherited down the grouping structure. At any level, it is possible to override any
2323   inherited metadata using the Add, Replace, or Delete attributes which are found
2324   on the IdentifiableType, VersionableType, and MaintainableType structures. To
2325   override an inherited structure, it should have the appropriate ID structure given
2326   for it, and then have the Replace element specified. To delete inherited
2327   metadata, use a similar technique but employ the Delete element. Once replaced
2328   or deleted, it is the modified form of the metadata which is inherited down the
2329   grouping structure.
2330
2331   Note that when referencing metadata that is subject to local overrides, it may be
2332   necessary to specify the exact module being referenced – otherwise, local
2333   deletions and overrides won't be referenced.

REPLACE WITH

"When using inheritance within groups to show comparability – or even just to reuse metadata – it is important to understand how local overrides work, as this can impact the way the metadata are grouped. Within each group all metadata are inherited down the grouping structure. Therefore it is important to include only that material that is consistently inherited at the group level. For example, if the VariableName changes at each use, do not include it at the group level, but declare it as a local override at the instance (study unit) level. It is possible to override any inherited metadata at the local level using the attribute "action" available on any object with an ID (Identifiable, Versionable, and Maintainable types). You may 'Add', 'Update', or 'Delete' any object or property of an object. The use of the action attribute is explained in the table describing the content of Identifiable Objects in section 2.1. Note that when referencing metadata subject to local overrides, you will need to specify the module or scheme in the reference in order to accurately resolve the reference."