Guidelines for collection migration following the publication of new CV versions

Controlled Vocabularies users may choose to retrofit their collections to reflect changes in the CVs as new versions are published.

These guidelines are intended to provide assistance in collection migration following the publication of new CV versions. They are suggestions only, and as such may not be applicable or suitable to every circumstance. If you have any questions about these guidelines or would like to provide feedback, please contact the DDI Controlled Vocabularies Group (DDI-CVG) at ddi-cvg@icpsr.umich.edu.

The following table includes the possible changes as described in the Versioning Policy, as well as the migration measures suggested for each of these changes.

Version changes	Comments	Migration measures
UNCHANGED: X	Code X, as well as the term and the definition for code X have remained unchanged.	No migration measures needed.
RENAMED: X-Y	Code X has been changed (renamed) to Y but the term and definition for Y are the same as for the old code X.*	X can be changed to Y with automatic migration.
REDEFINED: X	The definition for code X has been changed to reflect a change in meaning for code X.	A human being has to check all of the documentation in which code X has been used, and decide whether the code is still valid for the dataset or whether it has to be changed or deleted.
DEFINITION REPHRASED: X	The definition for code X has been rephrased for clarity or edited for accuracy without a change in meaning for code X.	No migration measures needed.
TERM REPHRASED: X	The term describing code X has been changed or edited for clarity or accuracy without a change in meaning for code X.	No migration measures needed.
WIDENED: X	The definition for code X has been changed to expand the meaning of the code.	Old X can be transferred to new X with automatic migration.
NARROWED: X	The definition for code X has been changed to reflect a narrowing in the meaning of the code.	A human being has to check all of the documentation in which this code has been used, and decide whether the code is still

		valid for the dataset or whether it has to be changed or deleted.
MERGED: X,Y,(n)-Y	The old code X has been removed and all the data classified with it now are included in code Y. *	Old codes X can be automatically migrated to Y.
SPLIT: X-X,Y, (n)	The meaning of code X has been narrowed and code Y has been added to cover for the remainder of the meaning previously held by code X.	A human being has to go through all data documented with code X and decide whether to leave in code X or change code X to new code Y.
REMOVED: X	Code X has been deleted.	A human being has to go through all data documented with code X and decide what code to use instead.
ADDED: Y	A new code (Y) has been added to the CV.	No direct migration involved. **

*The difference between MERGED and RENAMED: RENAMED denotes that the code has changed but the definition has remained the same (e.g. a mistake in the code spelling). MERGED does not guarantee that the definition has stayed the same but only says that all the old X codes can be automatically migrated to Y.

** If the new code causes migration measures, it will be for other codes potentially affected by the addition; in this case, the measures will be described in the migration specifications for these other codes.
For a complete collection retrofit, check for previous uses of the new code Y in "Other", as well as uncoded documentation - in which case a human being needs to decide whether the new code is appropriate to use.