Changes from Version 3.2 to 3.3

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Changes have resulted from two activities. First, correcting for issues arising from the implementation of version 3.2. Second, adding in the basic work of the Survey Development and Implementation (SDI) working group. This second set of materials will be more fully realized in DDI 4 with better support for metadata driven processing and provenance capture.

The prevailing design rule for 3.3 has been backward compatibility, i.e. that a valid 3.2 instance will also be valid against the 3.3 schemas. Documentation of changes has been separated into 3.2 corrections and SDI additions.

Note that TC has shifted from the Mantis issue tracker to JIRA. In loading the existing Mantis issues into JIRA a new issue number is assigned. The old Mantis issue number is searchable in the subject field.

# 3.2 corrections

## Documentation only

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| **Schema** | **Object** | **Change** |
| reusable.xsd | Mantis 634: ProcessingInstructionReference | CHANGED to read: "TypeOfObject should be set to GeneralInstruction or GenerationInstruction." |
| All | Mantis 625:  InstructionGroup/Description  ControlConstruct/ControlConstructName, Label, Description  ControlConstructGroup/Label  QuestionScheme/Label  QuestionGroup/QuestionGroupName, Label  Roster/Label, ConditionForContinuation  OrganizationScheme/OrganizationSchemeName, Label, Description  OrganizationGroup/Label  CategoryScheme/CategorySchemeName, Label, Description  CategoryGroup/CategoryGroupName, Label, TypeOfCategoryGroup  CodeListGroup/Label  VariableScheme/Label  VariableGroup/VariableGroupName, Label  NCubeGroup/NCubeGroupName, Label  RepresentedVariableGroup/RepresentedVariableGroupName  UniverseGroup/UniverseGroupName  ConceptualVariableGroup/ConceptualVariableGroupName  GeographicStructureScheme/GeographicStructureSchemeName, Label, Description  GeographicStructureGroup/GeographicStructureGroupName  GeographicLocationGroup/GeographicLocationGroupName  QualityStatementScheme/QualityStatementSchemeName, Label, Description  QualityStatementGroup/QualityStatementGroupName  ManagedRepresentationScheme/ManagedRepresentationSchemeName, Label, Description  ManagedRepresentationGroup/ManagedRepresentationGroupName  ManagedTextRepresentation/Label, Description  ManagedDateTimeRepresentation/ManagedDateTimeRepresentationName, Label, Description  ManagedNumericRepresentation/Label, Description  ManagedScaleRepresentation/Label, Description  ManagedMissingValuesRepresentation/ManagedMissingValuesRepresentationName, Label, Description  LifecycleEvent/LifecycleEventName, Label, Description | Corrected XxxName, Label, and Description documentation to reflect consistent wording |
| All | JIRA 1702:  Abstract  AccessConditions  AdditionalInformation  AvailabilityStatus  CellLabel  CitationRequirement  CollectionCompleteness  Comments  Commonality  ComplianceDescription  ConfidentialityStatement  DepositRequirement  Description  Difference  Disclaimer  EvaluationProcess  GeographicLevelDescription  Instructions  Label  MeasurePurpose  NoteContent  OtherAppraisalProcess  OtherQualityStatement  Outcomes  ProcessingCheck  Purpose  QuestionBlockIntent  QuestionIntent  Rationale  Reason  RelationshipDescription  Restrictions  SamplingError  SeriesDescription  SourceCharacteristic  SourceDescription  StatementOfAuthorization  UsageDescription  User  StructuredStringType | Harmonized description of structured string documentation to reflect support for both language repetition and structure using XHTML |

## Structural Changes

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| **Schema** | **Object/Issue** | **Change** |
| reusable.xsd | Mantis 633:  DDIAgencyIDType:  The regular expression of the DDIAgencyIDType does not provide adequate validation for the DDI Agency identifier which at minimum is two parts ( a country code or “int” and agency identifier separated by a dot “.”) | CHANGED: DDIAgencyIDType regular expression FROM [a-zA-Z0-9-]{1,63}(.[a-zA-Z0-9-]{1,63})\* TO [a-zA-Z0-9-]{1,63}(.[a-zA-Z0-9-]{1,63})+  NOTE: This changes ONLY the cardinality of number of "." extensions on an Agency ID from 0..n to 1..n |
| ddiprofile.xsd | Mantis 623:  Used: Support recursion of Used and NotUsed within the UsedType | No Action: The generation of profiles was intended to be done programmatically thereby nullifying the value of this proposal. In addition it was felt that recursion is often error prone and more complicated to handle programmatically. This issue could be reopened with additional information, examples, and community support. |
| reusable.xsd instance.xsd | Mantis 630:  New versions of dc.xsd and dcterms.xsd available | Updated dc.xsd and dcterms.xsd from 2003 version to 2008 version. Extended declarations and imports to include both of these schemas. |
| resusable.xsd | Mantis 624:  GeographicLocation/LocationValueType | ADDED ComponentParts 0..n which references the “orphan elements” identified in 3.2. This object was intended for inclusion and was inadvertently excluded during a subsequent change to LocationValueType. |

# SDI work

All SDI work involves the addition of new objects to existing structures. A hierarchical view of these additions is found in SDI\_3\_3.xlsx. This work covers the following areas:

* ***Sampling:*** Description, management, and usage of sampling plans and sample frames
* ***Weighting:*** Description of weighting methodology, weighting process, and applied usage
* ***Questionnaire Development:*** The process of developing, testing, and translating questions, question sequences, and questionnaires

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| **Schema** | **Object** | **Change** |
| datacollection.xsd | DataCollectionType | ADDED:  QuestionnaireDevelopment 0..n  CHOICE 0..n  SampleFrameScheme  SampleFrameSchemeReference  CHOICE 0..n  SamplingPlanScheme  SamplingPlanSchemeReference  CHOICE 0..n  DevelopmentActivitySchemeScheme  DevelopmentActivitySchemeReference |
| datacollection.xsd | SamplingProcedure | ADDED:  PopulationOfConcern 0..n  SamplingPlanReference 0..1  OverallTargetSampleSize 0..n  OverallSampleSize 0..1  ApplicationDetails 0..n |
| datacollection.xsd | MethodologyType | ADDED:  WeightingMethodology 0..n  CHANGED (documentation only):  SamplingProcedure |
| datacollection.xsd | WeightingType | ADDED:  WeightingMethodologyReference 0..n  r:AnalysisUnit 0..1  UsageGuide 0..1 |
| reusable.xsd | TypeOfObject (enumeration list) | ADDED enumerations:  ContentReviewActivity  DevelopmentProcessStep  PretestActivity  TranslationActivity  WeightingMethodology  DevelopmentActivityGroup  DevelopmentPlan  DevelopmentProcess  DevelopmentResults  QuestionnaireDevelopment  SampleFrame  SampleFrameGroup  SamplingPlan  SamplingPlanGroup  DevelopmentActivityScheme  SampleFrameScheme  SamplingPlanScheme |
| group.xsd | ResourcePackageType | ADDED:  Choice 0..n  d:SampleFrameScheme  d:SampleFrameSchemeReference  Choice 0..n  d:SamplingPlanScheme  d:SamplingPlanSchemeReference  Choice 0..n  d:DevelopmentActivityScheme  d:DevelopmentActivitySchemeReference |
| logicalproduct.xsd | VariableType | ADDED:  WeightingProcessReference 0..1 |
| logicalproduct.xsd | schema | ADDED New Element:  WeightingProcessReference |
| instance.xsd | FragmentType | ADDED:  d:SampleFrameScheme  d:SamplingPlanScheme  d:DevelopmentPlan  d:QuestionnaireDevelopment  d:SampleFrame  d:SampleFrameGroup  d:SamplingPlan  d:SamplingPlanGroup |
| datacollection.xsd | schema | ADDED New Elements:  AdditionalDataCollection  AdditionalRequiredResource  AllocationMethod  ApplicationDetails  AuxiliaryInforamtion  ContactReference  ContentReviewActivity  CostStructure  CustodianReference  DateOfSample  DebriefingProcess  DesiredOutcome  DevelopmentActivity  DevelopmentActivityGroup  DevelopmentActivityGroupReference  DevelopmentActivityGroupName  DevelopmentActivityName  DevelopmentActivityReference  DevelopmentActivityScheme  DevelopmentActivitySchemeName  DevelopmentActivitySchemeReference  DevelopmentObjective  DevelopmentObjectReference  DevelopmentPlan  DevelopmentPlanName  DevelopmentProcess  DevelopmentProcessName  DevelopmentProcessStep  DevelopmentResults  DevelopmentResultsName  DevelpmentProcessStepReference  DeviationFromSampleDesign  FrameLimitations  FrameRequirements  IntendedSurveyPopulation  IntendedTargetPopulation  MethodOfAdministration  MethodOfDelivery  MinimumLanguageAbility  ModeOfPretestCollection  OverallSampleSize  OverallTargetSampleSize  PariticipationRequirements  PopulationOfConcern  PredecessorStepReference  PreferredLanguageAbility  Prerequisite  PretestActivity  PretestAdministration  PrimaryPopulation  ProcessSummary  QuestionnaireDevelopment  QuestionnaireDevelopmentName  RecommendedFrameReference  RecommendedStaffRequirements  RecruitmentProcess  ReferencePeriod  RequirementsAssessment  ResourceObjectReference  ResourceUsage  ResourceUsed  ResponsibleForSamplingReference  ResultsDate  ResultsDetail  SampleFrame  SampleFrameAccess  SampleFrameGroup  SampleFrameGroupName  SampleFrameGroupReference  SampleFrameReference  SampleFrameScheme  SampleFrameSchemeName  SampleFrameSchemeReference  SampleSize  SampleSizeFormula  SamplingPlane  SamplingPlaneGroup  SamplingPlaneGroupName  SamplingPlaneGroupReference  SamplingPlaneReference  SamplingPlaneSchemeName  SamplingPlanReference  SamplingPlanScheme  SamplingPlanSchemeReference  SamplingUnit  SecondaryPopulation  SelectionProbability  SourceFrameReference  SplitCondition  SplitRationale  StaffClass  Stage  StrataNumber  Stratification  StratificationRationale  SubStage  SuccessorStepReference  TargetSampleSize  TranslationActivity  TranslationAid  TranslationAidResource  TranslationMethod  TranslationRequirements  TranslationSouceLanguage  TranslationTargetLanguage  TranslatorRequirements  TypeOfAdditionalData  TypeOfAdministrationMethod  TypeOfContentReview  TypeOfDevelopmentActivityGroup  TypeOfDeviationFromSampleDesign  TypeOfPlan  TypeOfPretestCollectionMode  TypeOfRequirementsAssessment  TypeOfResource  TypeOfResult  TypeOfSampleFrameGroup  TypeOfSamplingPlaneGroup  TypeOfTranslationAid  TypeOfTranslationMethod  TypeOfWeightingMethodology  UnitsOfFrame  UpdateProcedure  UsageExample  UsageGuide  UsageRecommentations  UsageRestrictions  ValidPeriod  WeightingMethodology  WeightingMethodologyReference |
| datacollection.xsd | schema | ADDED New complexTypes:  AdditionalDataCollectionType  ApplicationDetailsType  ContentReviewActivityType  CostStructureType  DebriefingProcessType  DevelopmentActivitySchemeType  DevelopmentActivityType  DevelopmentProcessStepType  DevelopmentProcessType  DevelopmentResultstType  DevelopmentResultsType  DeviationFromSampleDesignType  DevlopmentPlanType  LanguageAbilitySoughtType  MethodOfAdministrationType  ModeOfPretestCollectionType  OverallSampleSizeType  OverallTargetSampleSizeType  PopulationType  QuestionnaireDevelopmentType  PretestActivityType  PretestAdministrationType  RecommendedStaffRequirementsType  RequirementsAssessmentType  ResourceUsedType  ResultDetailType  SampleFrameGroupType  SampleFrameSchemeType  SampleFrameType  SamplingPlaneGroupType  SamplingPlaneType  SamplingPlanReferenceType  SamplingPlanSchemeType  SizeType  StageType  StratificationRationaleType  StratificationType  SubStageType  TargetSampleSizeType  TranslationActivityType  TranslationAidType  TranslationMethodType  TranslationRequirementsType  TranslatorRequirementsType  UsageGuideType  WeightingMethodologyType |
| datacollection.xsd | schema | ADDED:  xmlns:a=”ddi:archive:3\_3”  <xs:import namespace="ddi:archive:3\_2" schemaLocation="archive.xsd"/> |