Changes in this Draft (Version 5.0)

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This version of MoReq2 is the final draft. It has been submitted to the European Commission for final approval. PLEASE NOTE IT HAS NOT BEEN APPROVED AS FINAL. We hope to receive approval within a small number of weeks; the final published version may contain some differences from this draft. As soon as we receive approval, we will publish the final version and we will write to you.

This draft contains a large number of changes. Most of the changes are minor – they address grammar, presentation, and clarification. Readers should note that clarifications may clarify the text in ways they do not expect… The draft also re-sequences requirements in several places, to improve readability.

For technical reasons, we are not showing changes in this version. Change tracked versions are available on request, but they are difficult to use; we are recommending that most panellists should not use them.

The changes that we believe to be most significant are:

1. *For requirements, the "ID" numbers for paragraphs have now been changed to user-friendly hierarchical numbers. For all other paragraphs the ID number have been removed.*

2. *Major revision to metadata model (Appendix 9). The changes are extensive and include:*

    a. *the splitting off of appendix 9 into a separate publication to allow it to be published separately;*

    b. *addition of metadata for users, groups etc (with many consequent changes to other metadata elements);*

    c. *addition of rules for explicit/implicit metadata, inheritance, source of values and defaults;*

    d. *addition of metadata for components;*

    e. *additions, clarifications and modifications to many other metadata elements;*

    f. *textual additions to allow the Appendix to be published separately.*

    We will be starting work on the development of a MoReq2 xml schema to support this model and the MoReq2 requirements shortly. The schema will be available later this year.

3. *Clarification of the entity-relationship model (sections 2.3 and 13.2). This now shows explicitly that many of the possible configurations of records and aggregations are mutually exclusive. The figures in chapters 1 and 13 have been amended accordingly. This is an important clarification.*

4. *New rules for opening and closing sub-files (requirement 3.3.1 etc).*

5. *Significant clarifications to requirements for relocating, splitting, and combining classes etc. (section 3.4; this now incorporates part of section 9.1 in the previous draft).*

6. *New requirements for OAIS compliance at 5.3.4 and 11.7.12.*

7. *New requirement to export stubs at 5.3.22.*

8. *New requirements for APIs at 4.1.21 and 6.1.36.*

9. *Changes to the application of retention and disposition schedules, especially in the area of inheritance at requirements 5.1.11, 5.1.12, 5.1.13 and 5.1.18.*

10. *Several introductions to chapters and sections have been shortened, particularly 10.5 (case working) and 11.7(digital preservation); this is at the specific request of the DLM Forum review committee.*