



How to Publish a New Release of a Guide

This guide demonstrates the process of publishing a new release of a guide.

Written By: Dozuki System



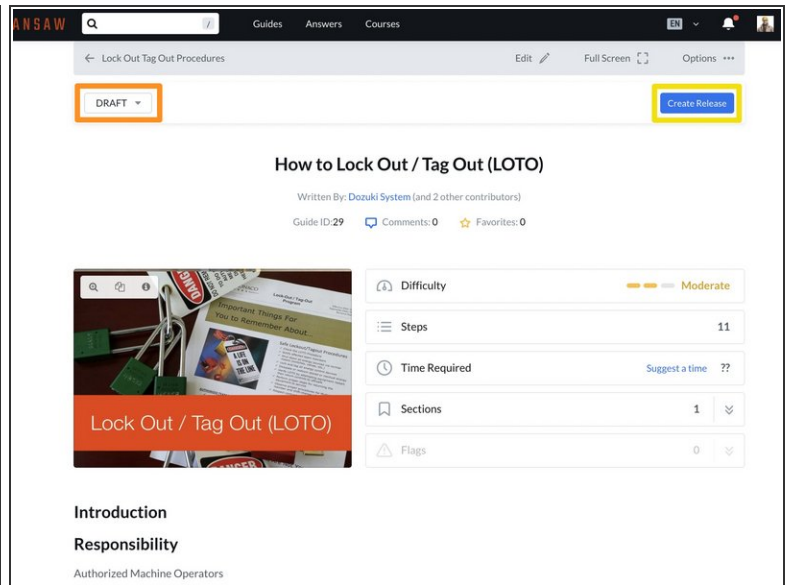
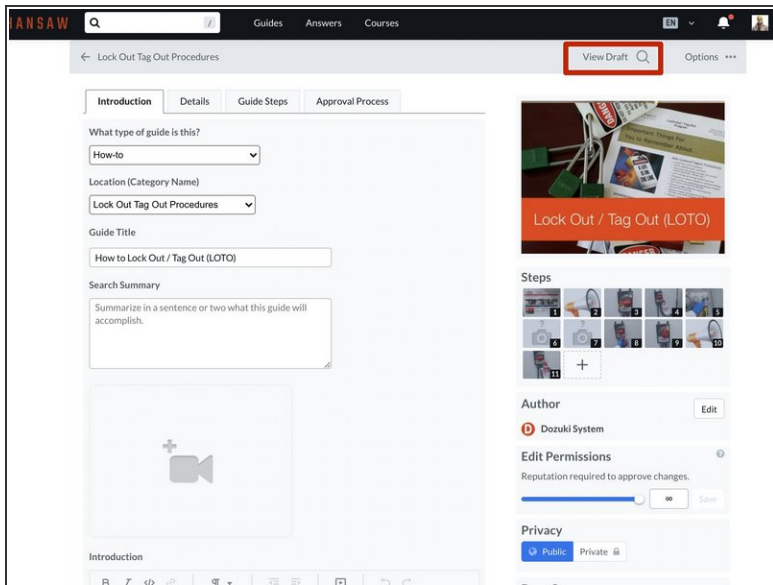
INTRODUCTION

This guide demonstrates the process of publishing a new release of a guide.

Who Can Publish Guides?

Users with **Admin** or **Author** privileges can make changes to the guide pages and publish a new release of the guide.

Step 1 — Start the Process



- After completing your edits, click on the **View Draft** button.
- The drop-down in the upper-left of the page will read **DRAFT**.
- ① The drop-down arrow will expand to display all of the published releases of the guide.
- Click on the **Create Release** button in the upper-right of the page.

Step 2 — Create a Release

Create Release

Version Type

Version

Release Title (optional)

Major

Minor

???

Release Title

Release Notes

What's new in this release?

B

I

<>

Publish

immediately

Request Approval

- The **Create Release** window will open when the page refreshes.

Step 3 — Select a Version Type

The figure consists of three side-by-side screenshots of a 'Create Release' form. Each screenshot shows the 'Version Type' section with 'Major' and 'Minor' radio buttons. In the first screenshot, the 'Major' button is highlighted with a red box. In the second screenshot, the 'Major' button is selected with a blue dot. In the third screenshot, the 'Minor' button is selected with a blue dot. The form also includes a 'Version' field, a 'Release Title (optional)' field, a 'Release Notes' text area, and a 'Publish' button.

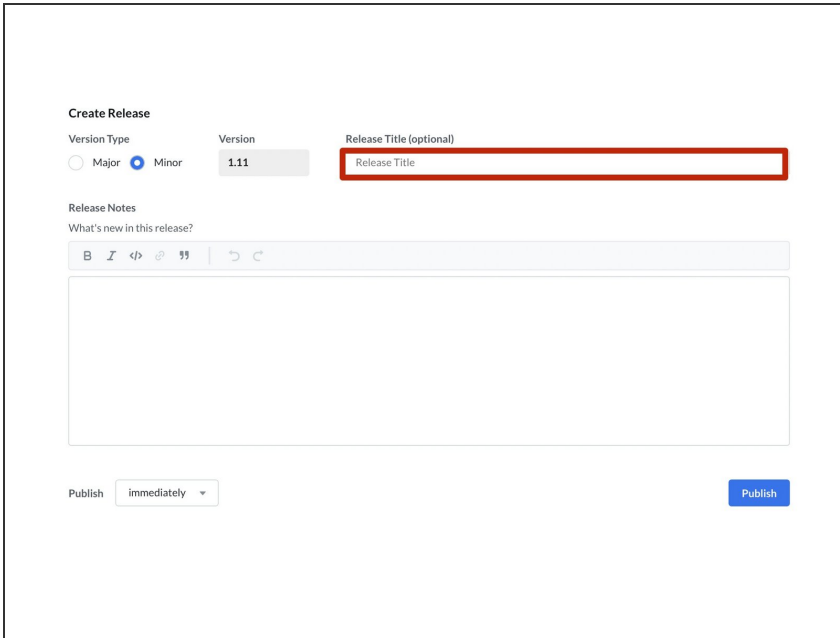
- Select either **Major Version** or **Minor Version** to identify the version type for this new release.
- **Major Versions** are typically categorized as document releases that contain major changes to steps (procedures) or the addition or editing of data capture forms.
- **Minor Versions** are typically categorized as document releases that contain only small changes to the document, like grammar, punctuation, or spelling.
- ① Guides can have different **Approval Processes** assigned to Major and Minor versions.
- ① Alternatively, a single **Approval Process** can be assigned for one version type with no process assigned for the other. With this scenario, Authors have the ability to publish the guide without it first going through an **Approval Process**.

Step 4 — Version Number

The image contains two side-by-side screenshots of a 'Create Release' form. Both screenshots show the 'Version Type' section with radio buttons for 'Major' and 'Minor', and a 'Version' text input field. In the left screenshot, 'Major' is selected and the version is '2.0'. In the right screenshot, 'Minor' is selected and the version is '1.11'. Both screenshots also show a 'Release Title (optional)' text input field, a 'Release Notes' text area with a rich text editor toolbar, and a 'Publish' button with a dropdown menu set to 'immediately'.


- If auto-numbering is enabled on your site, a version number will populate when you select the **Version Type**.
 - **Major Versions** increase the version to the next whole integer.
 - 📘 Ex: 1.0, 2.0, 3.0
 - **Minor Versions** increase the version to the next decimal.
 - 📘 Ex: 1.1, 1.2, 1.3

Step 5 — Release Title

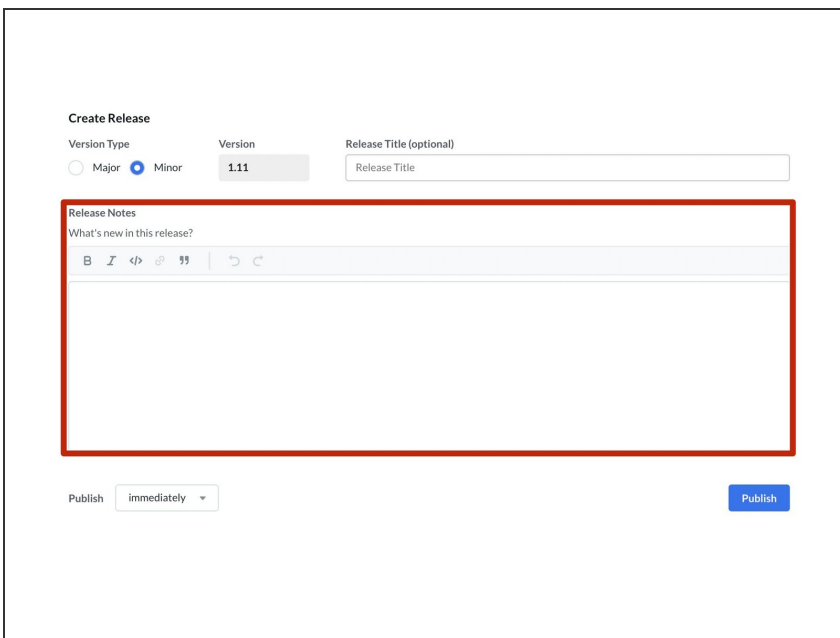


The screenshot shows the 'Create Release' interface. At the top, there's a 'Version Type' section with 'Major' and 'Minor' radio buttons, and a 'Version' field showing '1.11'. To the right is the 'Release Title (optional)' field, which is highlighted with a red rectangular box. Below this is the 'Release Notes' section, which includes a text area for 'What's new in this release?' and a rich text editor toolbar with icons for bold, italic, code, link, unlink, and list. At the bottom, there's a 'Publish' button and a dropdown menu set to 'immediately'.


- A **Release Title** can be set for the new release version of the guide.

 The use of a **Release Title** replaces the release version number in the **Version History**.

Step 6 — Include Release Notes



This screenshot is similar to the one for Step 5, showing the 'Create Release' form. The 'Release Title (optional)' field is now empty. The 'Release Notes' section, which includes the text area and the rich text editor toolbar, is highlighted with a red rectangular box. The 'Publish' button and the 'immediately' dropdown menu are still visible at the bottom.

- In the **Release Notes** field, record the change(s) that will be published in the new release.
-  Once the new release is published, site users can view the **Release Notes** on the guide.

Step 7 — Immediate Publishing of a Release

The left screenshot shows the 'Create Release' form. It includes fields for 'Version Type' (Major/Minor), 'Version' (1.12), and 'Release Title (optional)'. Below these is a 'Release Notes' section with a rich text editor. At the bottom, there is a 'Publish' dropdown menu set to 'immediately' and a 'Publish' button.

The right screenshot shows the resulting release page titled 'How to Lock Out / Tag Out (LOTO)'. The page header displays the version 'v1.12' and the date '07/12/2021'. The page content includes a title, author information, and a sidebar with metadata such as 'Difficulty: Moderate', 'Steps: 11', 'Time Required', 'Sections: 1', and 'Flags: 0'.

- To immediately publish your release, be sure the **Publish** drop-down field is set on **Immediately**.
- Click on the **Publish** button.
- Once the page refreshes to guide view, the release date updates.
- If published immediately, the current date shows in the upper-left of the page.

Step 8 — Request Approval for Immediate Release

Create Release

Version Type

☒ Major ☐ Minor

Version

4.0

Release Title (optional)

Release Title

Release Notes

What's new in this release?

B I

Once approved, publish

immediately

Request Approval

HANSAW

Guides Answers Courses

EN

Carl

← Lock Out Tag Out Procedures

Edit

Full Screen

Options

v4.0

M

AWAITING APPROVAL

Quality Approval

07/20/2021

by Carl Roberts

Cancel Release

Details

A version of this guide needs your approval! You should [take care of that.](#)

How to Lock Out / Tag Out (LOTO)

Written By: Dozuki System (and 2 other contributors)

Guide ID:29 Comments:0 Favorites:0

Difficulty

Moderate

Steps

11

Time Required

[Suggest a time](#) ??

- To immediately publish a release that has an Approval Process, click the **Request Approval** button in the lower-right corner, beneath the **Release Notes** field.
- The release status will now be **Awaiting Approval**.

Step 9 — Schedule a Future Publish Date

The screenshot shows the 'Release Notes' interface. On the left, a text area for 'What's new in this release?' is visible. Below it, a 'Publish' dropdown menu is open, showing options: 'immediately', 'on a specific date' (highlighted with an orange box), and 'after a number of days'. A red box highlights the 'Once approved, publish' label and the dropdown menu. On the right, a calendar for March 2022 is displayed, with the date 03/14/2022 selected. A yellow arrow points from the 'on a specific date' option to the date field. Below the calendar, a 'Request Approval' button is visible.

- To schedule a future Publish date and time, click in the **Publish** drop-down field.
 - ❗ *If you do not adjust this field, the new release will be published immediately (or immediately after it clears any [Approval Process](#) assigned).*
- Select **on a specific date**
- Click in the **date** field in the lower-right of the page.
- Type in the publish date for the new release, or you can select it from the calendar.

Step 10

create Release

Version Type: Major Minor (selected) Version: 0.2 Release Title (optional): Release Title

Release Notes: What's new in this release?

Rich text editor: B I <> [link icon] [image icon] [undo icon] [redo icon]

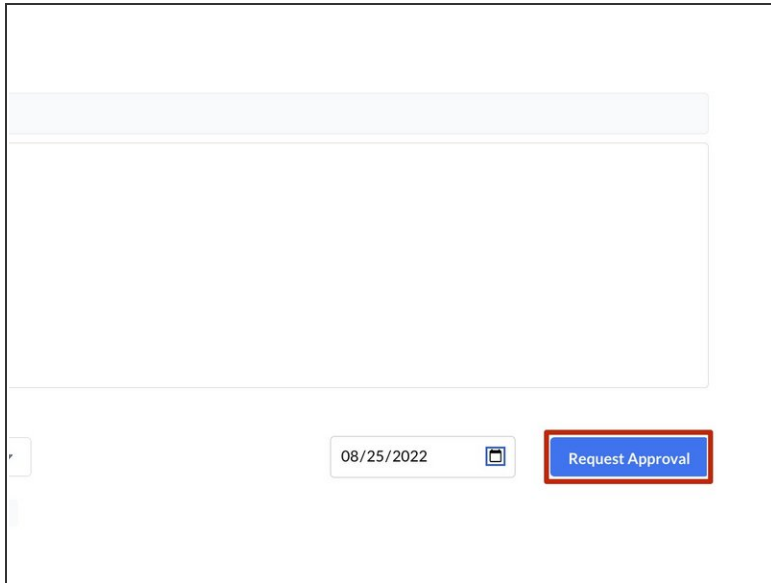
After approval, publish: after a number of days (dropdown) 3 (text box) Request Approval (button)

Users can train on this immediately (checkbox) immediately on a specific date after a number of days (dropdown)

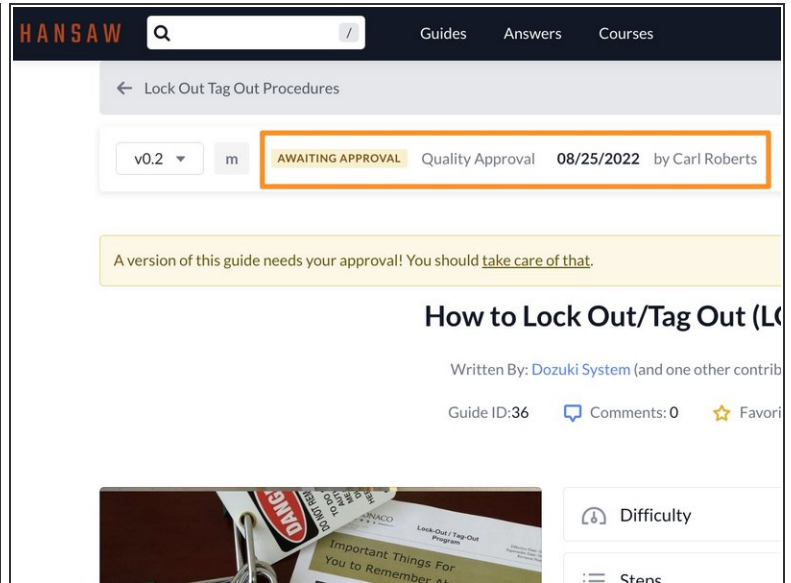
How to Lock Out / Tag Out (LOTO)

- To publish after a specified number of days, select **after a number of days**.
- Type in the number of days between the day the release is approved and the day the release is published.
- ❗ The selected number of days will only start "counting down" once the release has been approved; the release will be unpublished until then.
- ★ When it is part of a course, users can immediately train on the new release.

Step 11 — Schedule Your New Release



A screenshot of a web interface for scheduling a release. It shows a large empty text area for a description, a date field set to '08/25/2022', and a blue button labeled 'Request Approval' which is highlighted with a red border.



- Click on the **Request Approval** button when all of the fields are complete.
- Once the page refreshes to guide view, the release date updates.
- When the release of a guide is scheduled to publish on a specific date, the status of the release displays as **AWAITING APPROVAL** or **APPROVED**, if approved.

Step 12 — Request Approval for Scheduled Release

Create Release

Version Type

☐ Major ☒ Minor

Version

3.1

Release Title (optional)

Release Title

Release Notes

What's new in this release?

B I

Once approved, publish

on a specific date

10/20/2021

Request Approval

Users can train on this immediately after approval

HANSAW

q

Guides

Answers

Courses

EN

Carl

← Lock Out Tag Out Procedures

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v3.1

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Written By: Dozuki System (and 2 other contributors)

Guide ID: 29

Comments: 0

Favorites: 0

Difficulty

Moderate

Steps

11

Time Required

Suggest a time ??

Sections

1

Flags

0

- If the guide has been assigned an Approval Process, click the **Request Approval** button in the lower-right corner, beneath the **Release Notes** field.
- The release status will now be **Awaiting Approval**.