



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

The first screenshot shows the 'Lock Out Tag Out Procedures' page in the ANSAW system. The 'Introduction' tab is active, and the 'How-to' dropdown menu is expanded, showing 'Lock Out Tag Out Procedures' selected. The 'View Draft' button is highlighted with a red box. The second screenshot shows the same page after clicking 'View Draft'. The 'DRAFT' button is highlighted with an orange box, and the 'Create Release' button is highlighted with a yellow box. The page title is 'How to Lock Out / Tag Out (LOTO)' and it shows the author 'Dozuki System' and the guide ID '29'.

- 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

☐ Major

☐ Minor

Version

???

Release Title (optional)

Release Title

Release Notes

What's new in this release?

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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' field with 'Major' and 'Minor' radio buttons. In the first screenshot, the 'Major' radio button is selected and highlighted with a red box. In the second screenshot, the 'Major' radio button is selected and highlighted with an orange box. In the third screenshot, the 'Minor' radio button is selected and highlighted with a yellow box. 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 'Major' and 'Minor' radio buttons, a 'Version' text field, and a 'Release Title (optional)' text field. Below this is a 'Release Notes' section with a rich text editor. At the bottom, there is a 'Publish' button and a dropdown menu set to 'immediately'.

Left Screenshot: The 'Major' radio button is selected and highlighted with a red box. The 'Version' field contains '2.0' and is also highlighted with a red box. The 'Release Title' field is empty.

Right Screenshot: The 'Minor' radio button is selected and highlighted with an orange box. The 'Version' field contains '1.11' and is also highlighted with an orange box. The 'Release Title' field is empty.

- 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

Create Release

Version Type

☐ Major

☒ Minor

Version

1.11

Release Title (optional)

Release Title

Release Notes

What's new in this release?

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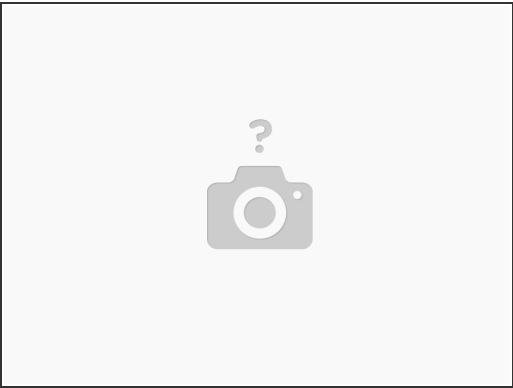
Publish

immediately

Publish

- 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



- ☑ If you wish to disable the **Release Title** field on a page, please see [How to Disable Release Titles](#).

Step 7 — Include Release Notes

Create Release

Version Type

☐ Major

☒ Minor

Version

1.11

Release Title (optional)

Release Title

Release Notes

What's new in this release?

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Publish

immediately

Publish

- 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 8 — 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 guide view for 'How to Lock Out / Tag Out (LOTO)'. The top navigation bar shows the date '07/12/2021' highlighted. The guide title is 'How to Lock Out / Tag Out (LOTO)' by Carl Roberts. The guide ID is 29. The difficulty is 'Moderate', steps are 11, time required is 'Suggest a time ??', sections are 1, and flags are 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 9 — 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

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Guides Answers Courses

EN

Carl

← Lock Out Tag Out Procedures

Edit

Full Screen

Options

v4.0

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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 10 — Schedule a Future Publish Date

The screenshot shows the 'Release Notes' section with a text area for 'What's new in this release?'. Below the text area is a 'Publish' dropdown menu. The dropdown menu is open, showing three options: 'immediately', 'on a specific date', and 'after a number of days'. The 'on a specific date' option is highlighted with an orange box. To the right of the dropdown menu is a date field showing '03/14/2022' and a calendar icon. A yellow arrow points from the 'on a specific date' option to the date field. Below the date field is a 'Request Approval' button.

- To schedule a future Publish date and time, click in the **Publish** drop-down field.
 - ① *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 11

reate Release

ersion Type

Major Minor

Version

0.2

Release Title (optional)

Release Title

Release Notes

What's new in this release?

B I <>

Once approved, publish

after a number of days

3

Request Approval

Users can train on this immediately

on a specific date

after a number of days

How to Lock Out / Tag Out (LOTO)

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ersion Type

Major Minor

Version

0.2

Release Title (optional)

Release Title

Release Notes

What's new in this release?

B I <>

Once approved, publish

after a number of days

3

Request Approval

Users can train on this immediately after approval

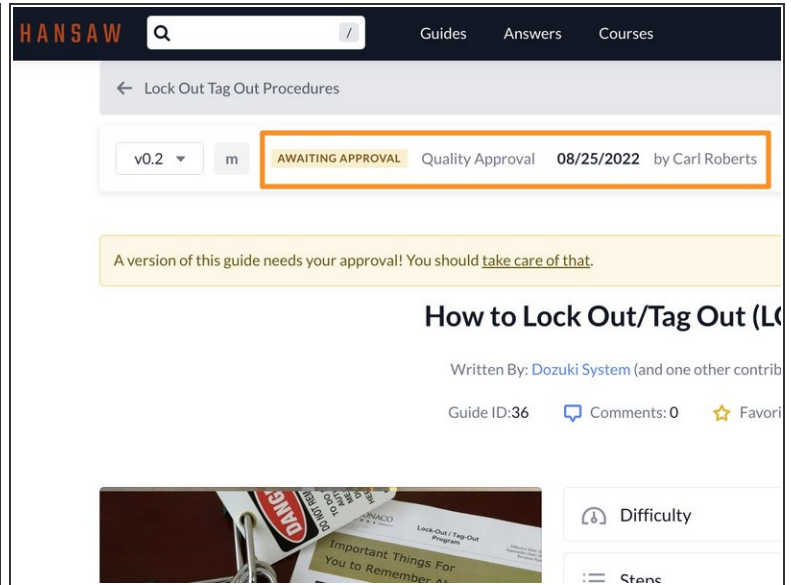
How to Lock Out / Tag Out (LOTO)

- 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 12 — Schedule Your New Release

08/25/2022

Request Approval



- 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 13 — 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

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Guides Answers Courses

EN

Carl

Lock Out Tag Out Procedures

Edit

Full Screen

Options

v3.1

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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 ??

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**.

Step 14 — Send an Email Notification for New Releases

The image shows two side-by-side screenshots from a software interface. The left screenshot is the 'Create Release' form. It has a 'Version Type' section with 'Major' selected and 'Minor' as an option. The 'Version' field contains '1.0'. Below this is a 'Release Notes' section with a text area and a rich text editor toolbar. At the bottom, there is a checkbox labeled 'Email a publication notice to all users with view permission' which is checked. The right screenshot shows an email notification. It has a header with a logo and a main body with a message: 'Carl Roberts, 1.0 of How to Pack a Box! has been released by Carl Roberts on September 11, 2023, 7:17 am. Click [here](#) to view the guide and acknowledge the changes.'

- Click the checkbox at the bottom of the release screen to enable or disable email notifications.
- ① When this feature is enabled, publishing a new release will send an email to all users with viewing permission.
 - ① For guides with **Public** visibility, this will notify all users.
 - ① For **Private** guides, this includes all admins, or users that have individual or team permission to view a guide.
- Details about the new publication appear in the email.
- ✳ The publication email will not send until the release is successfully approved.
 - ① The email is subject to both version control and [release schedules](#).