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

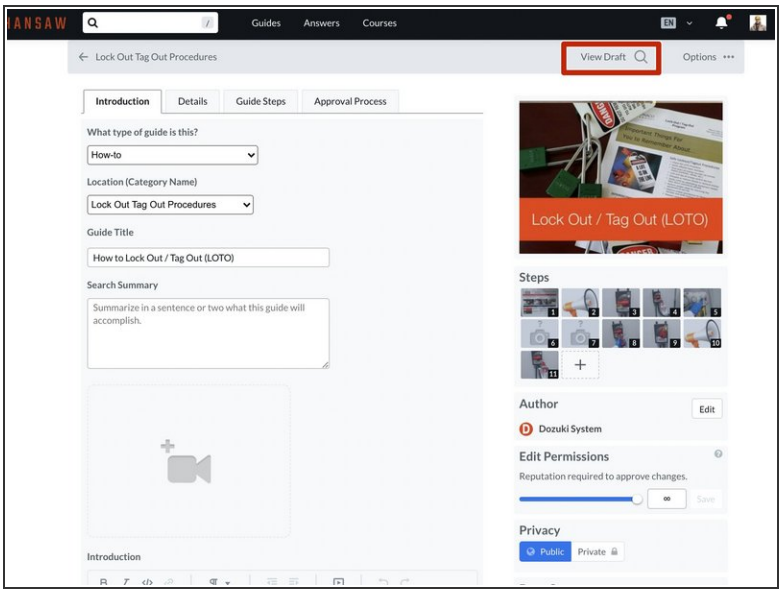
This guide demonstrates the process of publishing a new release of a guide.

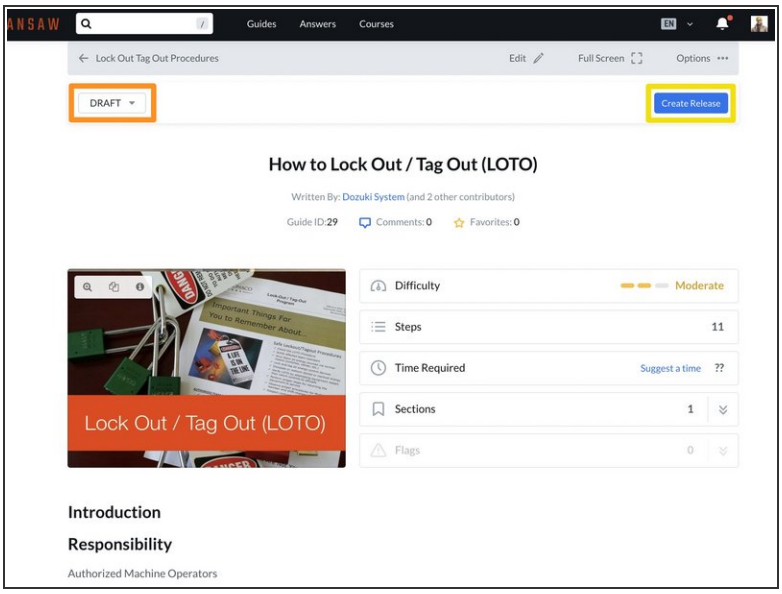
Who Can Publish Guides?

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

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Step 1 — Start the Process

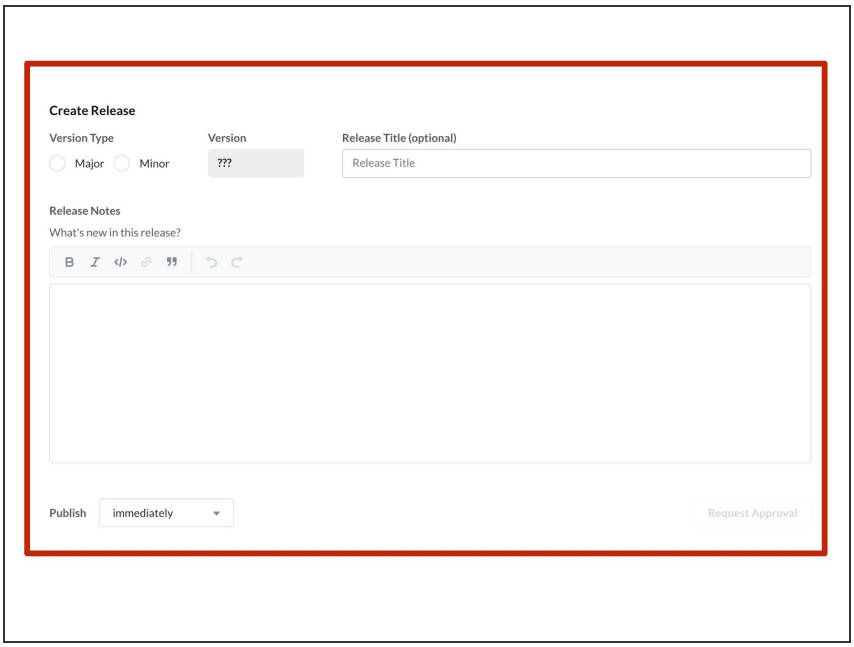




- After completing your edits, select **View Draft**.
- The drop down in the upper-left of the page will read **DRAFT**.

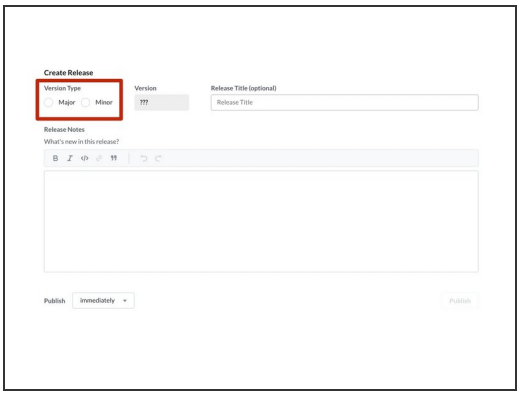
  ⓘ The drop-down arrow will expand to display all of the published releases of the guide.
- Click on the **Create Release** button in the upper-right of the page.

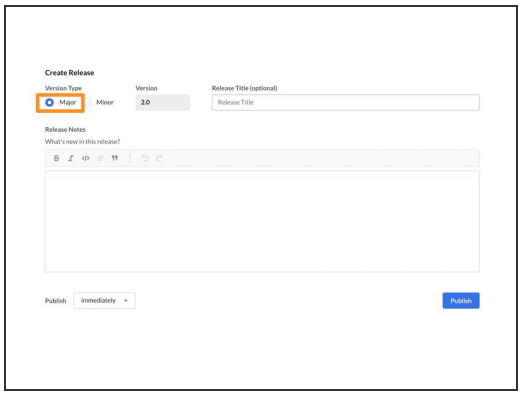
Step 2 — Create a Release

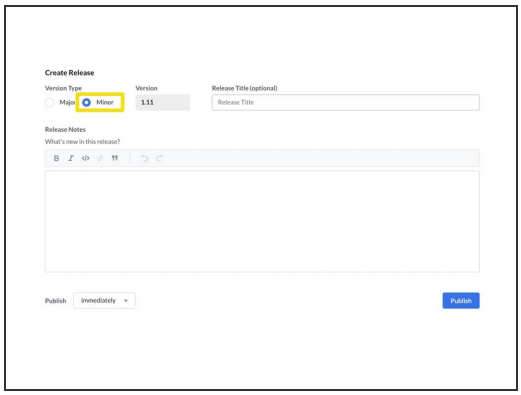


- The **Create Release** window will appear when the page refreshes.

Step 3 — Select a Version Type





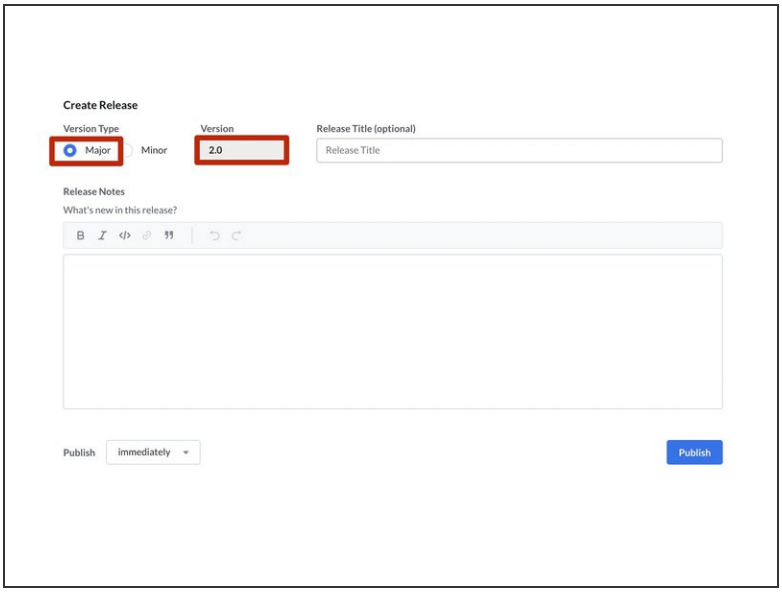


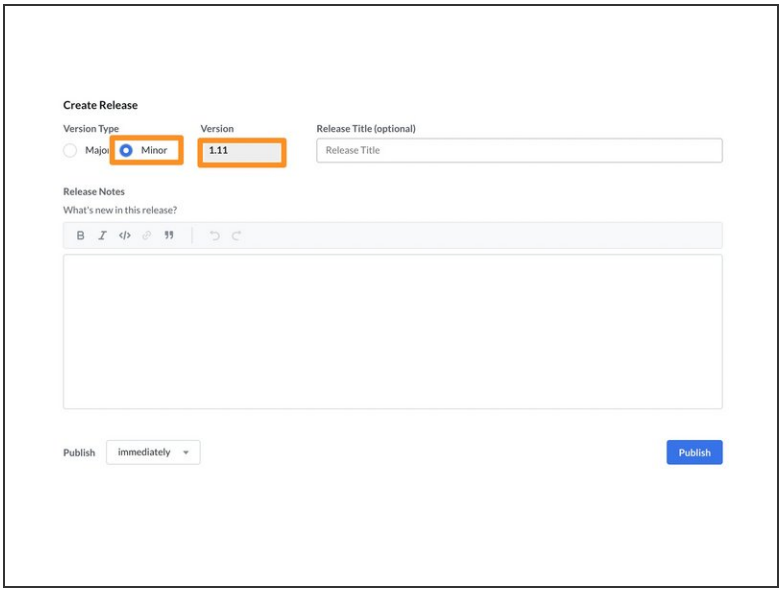
- Select either **Major Version** or **Minor Version** to identify the version type for this new release.
  - **Major Versions** are typically categorized as document releases that contain major changes to steps (procedures) or the addition or editing of data capture forms.
  - **Minor Versions** are typically categorized as document releases that contain only small changes to the document, like grammar, punctuation, or spelling.

    Guides can have different **Approval Processes** assigned to Major and Minor Versions.

    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**.

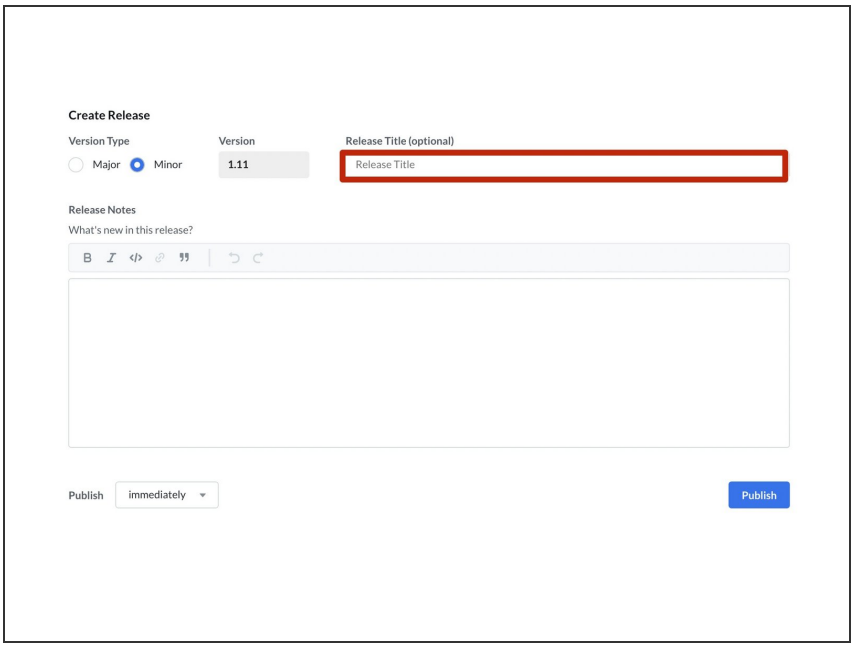
Step 4 — Version Number





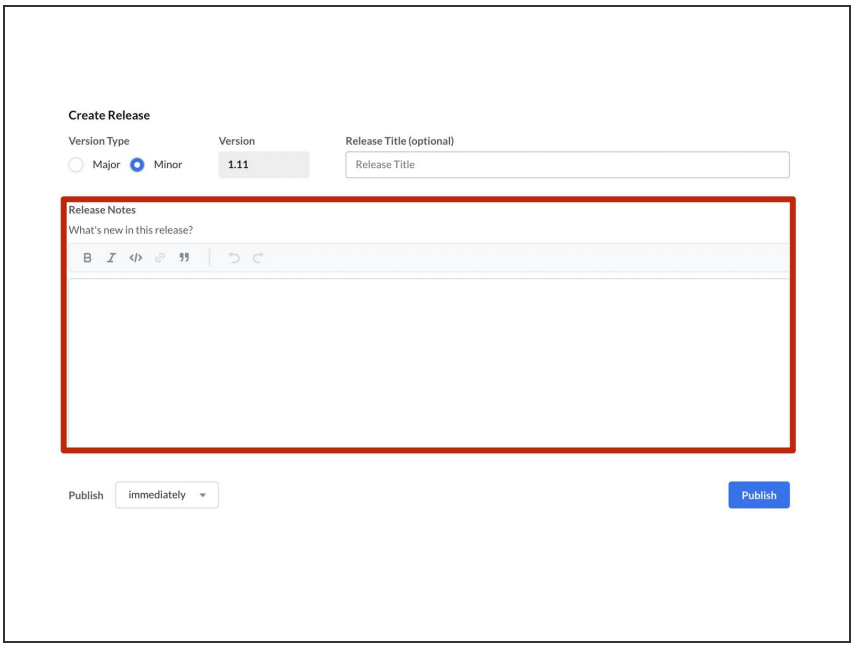
- If auto-numbering is enabled on your site, a version number will populate when you select the **Version Type**.
  - **Major Versions** increase the version to the next whole integer.
    - Ex: 1.0, 2.0, 3.0
  - **Minor Versions** increase the version to the next decimal.
    - Ex: 1.1, 1.2, 1.3

Step 5 — Release Title



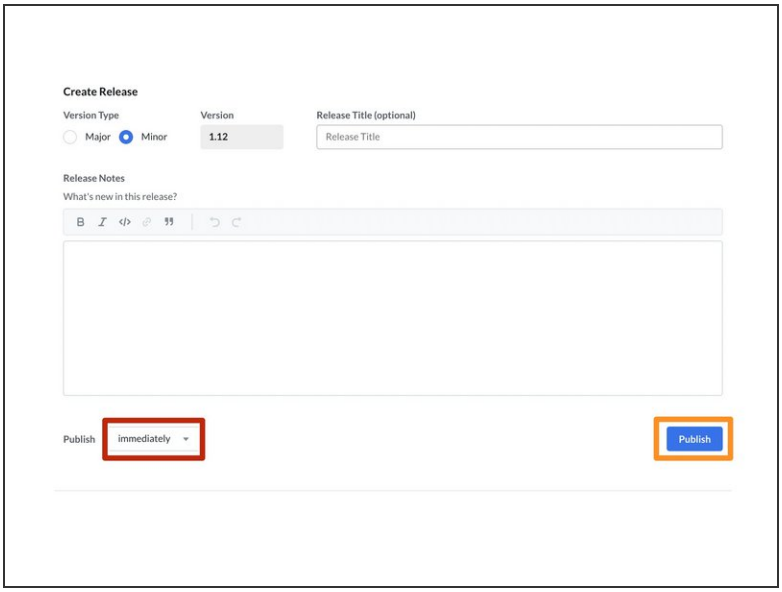
- A **Release Title** can be set for the new release version of the guide.
  - The use of a **Release Title** will replace the release version number in the **Version History**.

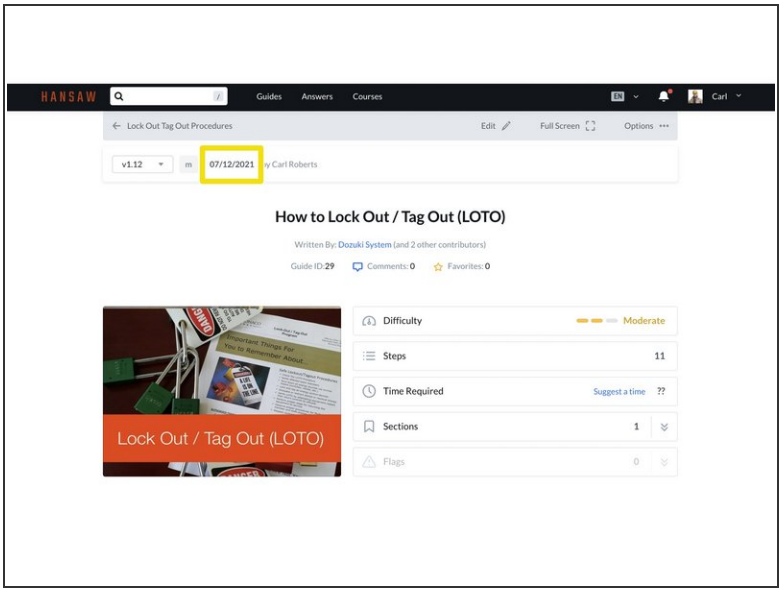
Step 6 — Include Release Notes



- 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.

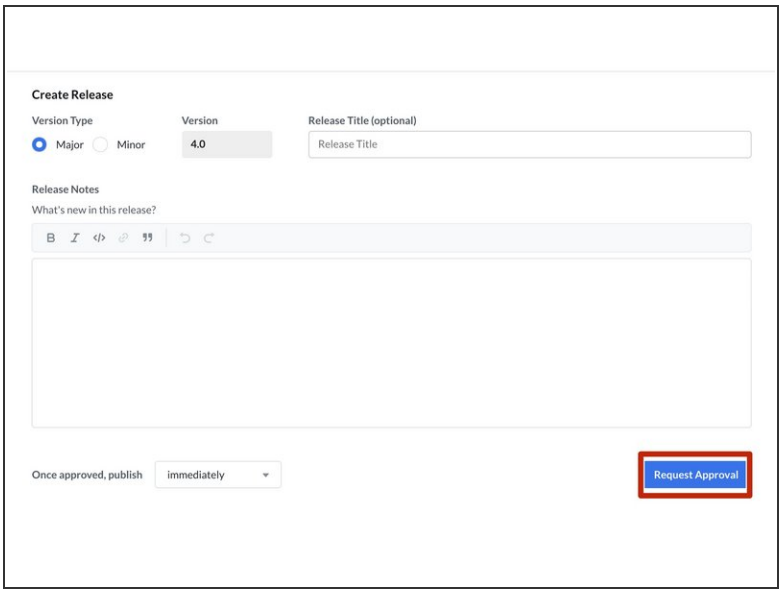
Step 7 — Immediate Publishing of a Release

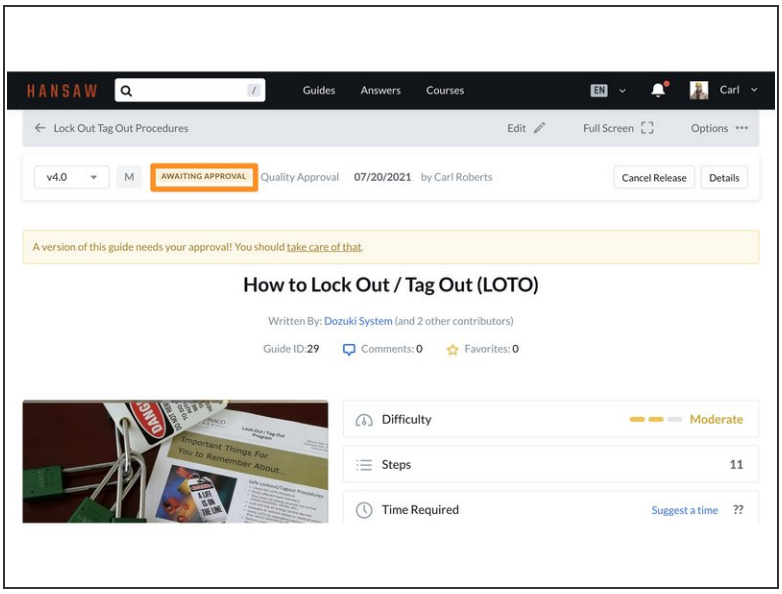




- To immediately publish your release, be sure the **Publish** drop-down field is set on **Immediately**.
- Click on the **Publish** button.
- Once the page refreshes to guide view, the release date will update.
- If published immediately, the current date shows in the upper-left of the page.

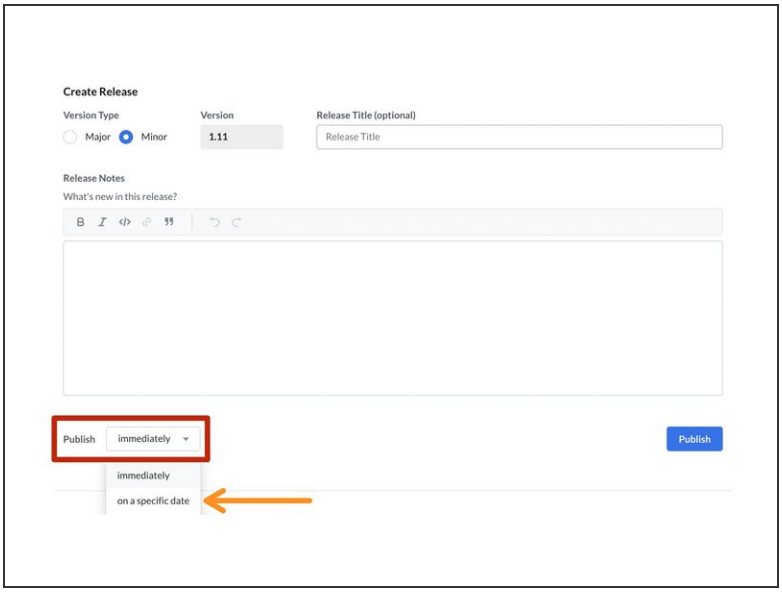
Step 8 — Request Approval for Immediate Release

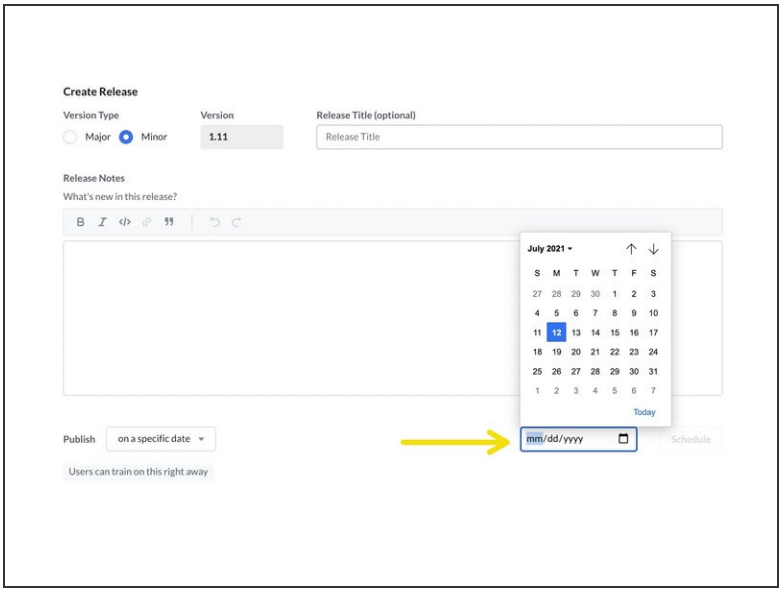




- To immediately publish a release that has an Approval Process, click the **Request Approval** button in the lower-right corner, beneath the **Release Notes** field.
- The release status will now be **Awaiting Approval**.

Step 9 — Schedule a Future Publish Date





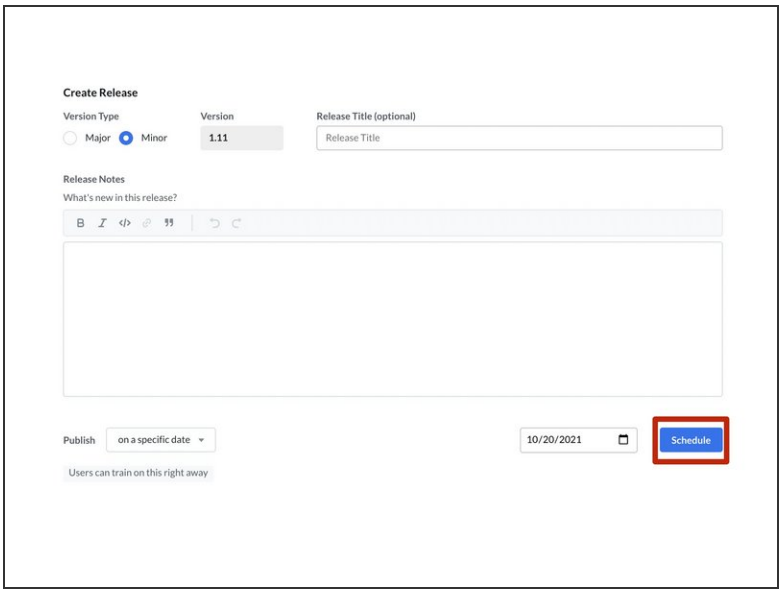
- To schedule a future Publish date and time, click in the **Publish** drop-down field.

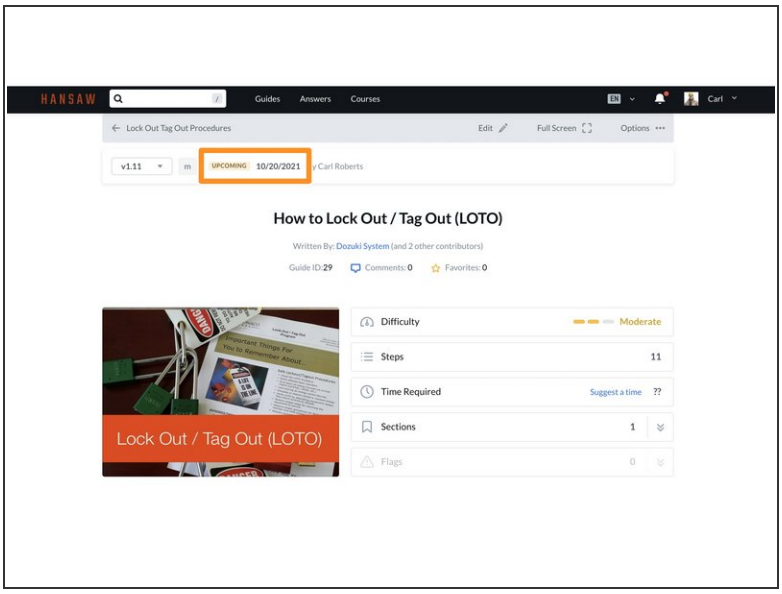
  If you do not adjust this field, the new release will be published immediately (or immediately after it clears any Approval Process assigned).

- 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.

  When it is part of a course, users can immediately train on the new release.

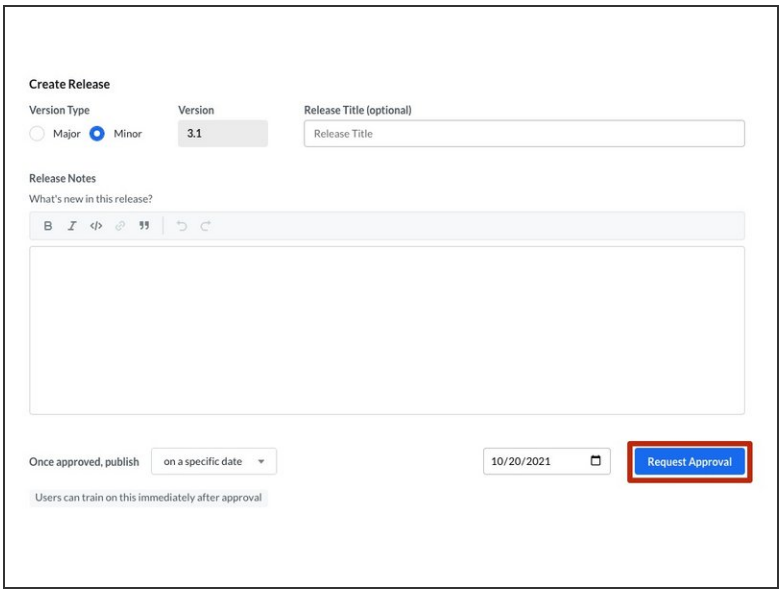
Step 10 — Schedule Your New Release

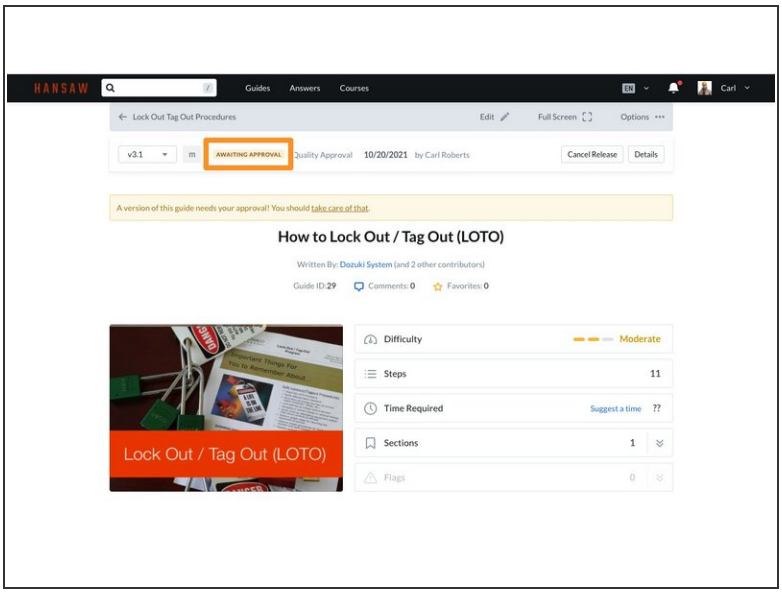




- Click on the **Schedule** button when all of the fields are complete.
- Once the page refreshes to guide view, the release date will update.
- When the release is scheduled to publish on a specific date, a status of **UPCOMING** displays next to the specified date.

Step 11 — Request Approval for Scheduled Release





- 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**.