



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



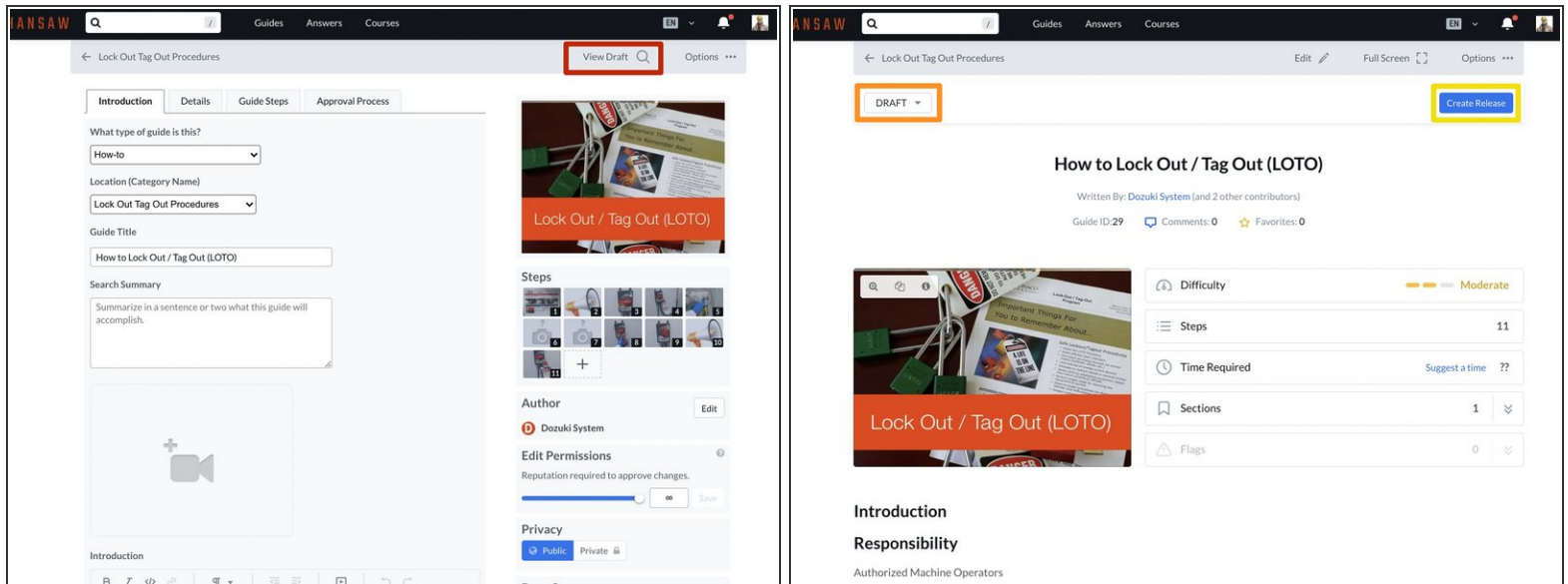
INTRODUCTION

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

Who Can Publish Guides?

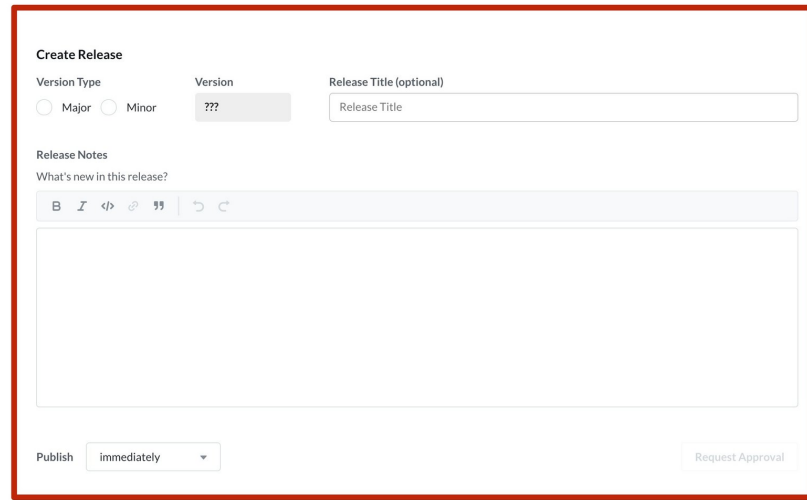
Users with **Admin** or **Author** privileges can make changes to the guide pages and publish a new release of the guide.

Step 1 — Start the Process



- After completing your edits, select **View Draft**.
- 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



The screenshot shows a 'Create Release' form. At the top, it has a title 'Create Release'. Below this, there are three sections: 'Version Type' with radio buttons for 'Major' and 'Minor', 'Version' with a text input field containing '???' and a 'Publish' button, and 'Release Title (optional)' with a text input field containing 'Release Title'. Below these is a 'Release Notes' section with the prompt 'What's new in this release?' and a rich text editor with a toolbar containing icons for bold, italic, code, link, unlink, list, and undo. At the bottom, there is a 'Publish' button, a dropdown menu set to 'immediately', and a 'Request Approval' button.

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

Step 3 — Select a Version Type

The image displays three sequential screenshots of the 'Create Release' form, illustrating the selection of a version type. Each screenshot shows the 'Version Type' section with 'Major' and 'Minor' radio buttons, a 'Version' field, and a 'Release Title (optional)' field. The 'Release Notes' section is also visible, featuring a text area and a 'Publish' button.

- First Screenshot:** The 'Major' radio button is selected and highlighted with a red box. The 'Version' field contains '???' and the 'Release Title' field is empty.
- Second Screenshot:** The 'Minor' radio button is selected and highlighted with an orange box. The 'Version' field contains '2.0' and the 'Release Title' field is empty.
- Third Screenshot:** The 'Minor' radio button is selected and highlighted with a yellow box. The 'Version' field contains '1.11' and the 'Release Title' field is empty.

- 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

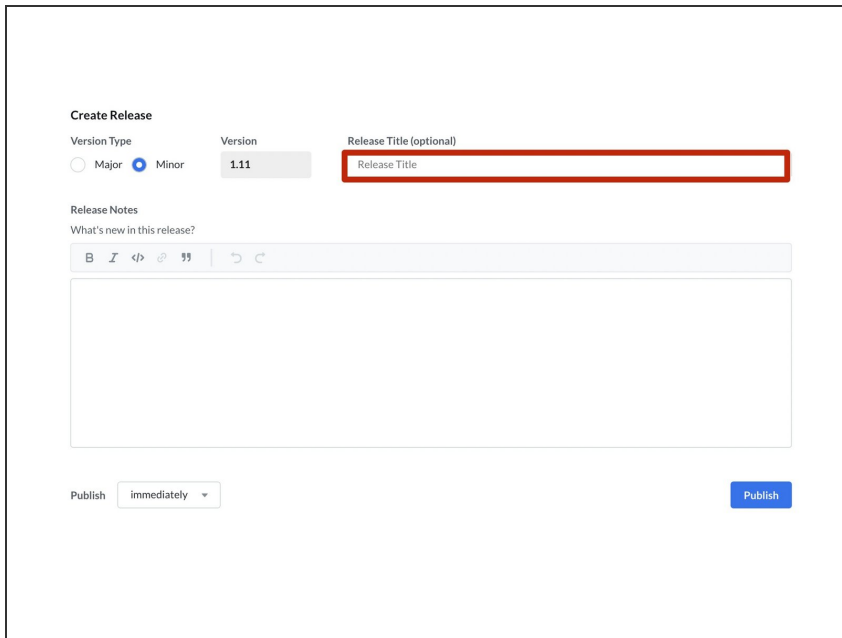
The image contains two side-by-side screenshots of a 'Create Release' form. Both screenshots show the 'Version Type' section with 'Major' and 'Minor' radio buttons, a 'Version' text field, and a 'Release Title (optional)' text field. Below this is a 'Release Notes' section with a rich text editor. At the bottom, there is a 'Publish' button and a dropdown menu set to 'immediately'.

Left Screenshot: The 'Major' radio button is selected. The 'Version' field contains '2.0'. The 'Release Title' field is empty.

Right Screenshot: The 'Minor' radio button is selected. The 'Version' field contains '1.11'. 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

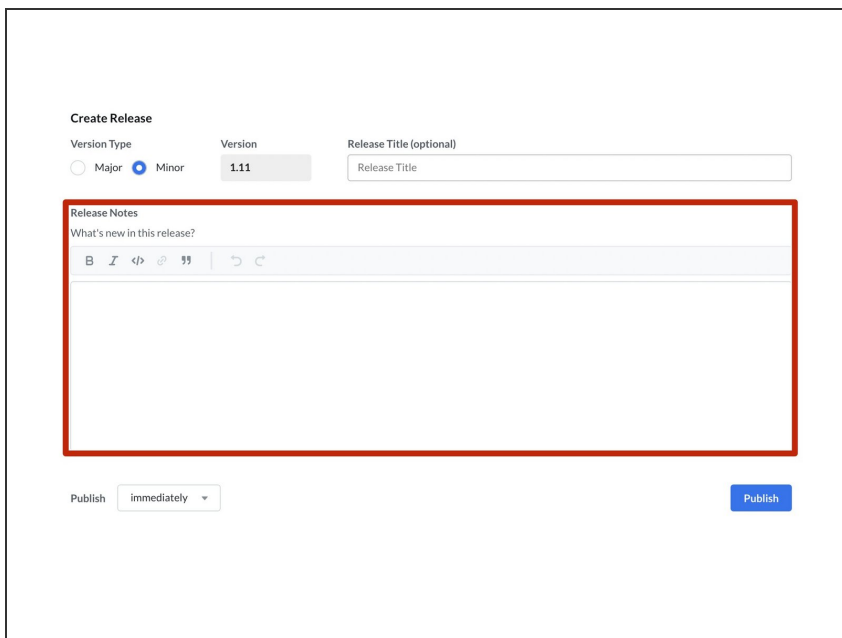


The screenshot shows the 'Create Release' form. At the top, there's a 'Version Type' section with 'Major' and 'Minor' radio buttons, and a 'Version' field showing '1.11'. To the right is the 'Release Title (optional)' field, which is highlighted with a red border. Below this is the 'Release Notes' section, which includes a text area for 'What's new in this release?' and a 'Publish' button. The 'Publish' button is currently disabled, and there's a dropdown menu next to it showing 'immediately'.

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

i The use of a **Release Title** will replace the release version number in the **Version History**.

Step 6 — Include Release Notes



The screenshot shows the 'Create Release' form. The 'Release Title (optional)' field is now empty. The 'Release Notes' section, which includes a text area for 'What's new in this release?' and a 'Publish' button, is highlighted with a red border. The 'Publish' button is currently disabled, and there's a dropdown menu next to it showing 'immediately'.

- In the **Release Notes** field, record the change(s) that will be published in the new release.

i 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, the 'Publish' dropdown is set to 'immediately', and the 'Publish' button is highlighted with an orange border.

The right screenshot shows the resulting guide view for 'How to Lock Out / Tag Out (LOTO)'. The header displays the version 'v1.12', the date '07/12/2021' (highlighted with a yellow box), and the author 'by Carl Roberts'. The guide content includes a title, author information, and a sidebar with metadata such as 'Difficulty: Moderate', 'Steps: 11', 'Time Required: Suggest a time ??', '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 will update.
- 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](#) ??

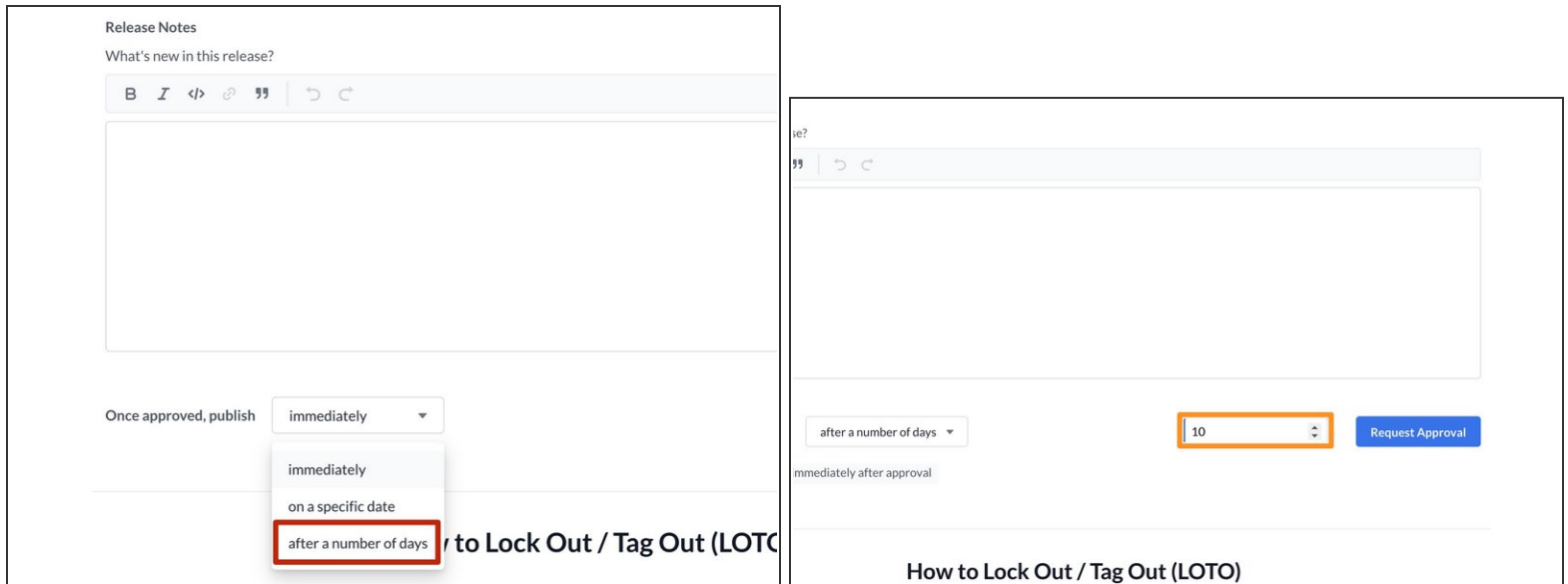
- To immediately publish a release that has an Approval Process, click the **Request Approval** button in the lower-right corner, beneath the **Release Notes** field.
- The release status will now be **Awaiting Approval**.

Step 9 — Schedule a Future Publish Date

The screenshot shows the 'Release Notes' 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 with a calendar icon. A yellow arrow points from the 'on a specific date' option to the date field. The date field shows '03/14/2022' and a 'Request Approval' button.

- 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



The screenshot shows the 'Release Notes' form. The title is 'What's new in this release?'. Below the title is a rich text editor with a toolbar containing icons for bold (B), italic (I), code (</>), link, quote, undo, and redo. The main text area is empty. Below the text area, there is a section labeled 'Once approved, publish' with a dropdown menu. The dropdown menu is open, showing three options: 'immediately', 'on a specific date', and 'after a number of days'. The 'after a number of days' option is highlighted with a red border. To the right of the dropdown menu, there is a text input field with the number '10' and a 'Request Approval' button. Below the input field, there is a label 'immediately after approval'. The bottom of the form has a section titled '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 from the current day that you want for the publish date of the new release.
- ☑ When it is part of a course, users can immediately train on the new release.

Step 11 — Schedule Your New Release

The left screenshot shows the 'Create Release' form. It includes fields for 'Version Type' (Major/Minor), 'Version' (1.11), and 'Release Title (optional)'. There is a 'Release Notes' section with a rich text editor. At the bottom, there is a 'Publish' dropdown set to 'on a specific date', a date picker set to '10/20/2021', and a blue 'Schedule' button. A note at the bottom says 'Users can train on this right away'.

The right screenshot shows the resulting guide view for 'How to Lock Out / Tag Out (LOTO)'. The status is 'UPCOMING' with the date '10/20/2021'. The guide is written by 'Dozuki System (and 2 other contributors)' and has Guide ID '29'. It has 0 comments and 0 favorites. The guide details show a difficulty of 'Moderate', 11 steps, a time required of '??', 1 section, and 0 flags. The guide title is 'How to Lock Out / Tag Out (LOTO)'.

- 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 12 — Request Approval for Scheduled Release

The image shows two side-by-side screenshots from the Hansaw platform. The left screenshot is the 'Create Release' form. It has fields for 'Version Type' (Major/Minor), 'Version' (3.1), and 'Release Title (optional)'. Below these is a 'Release Notes' section with a rich text editor. At the bottom, there's a 'Request Approval' button highlighted with a red box. The right screenshot shows the resulting guide page for 'How to Lock Out / Tag Out (LOTO)'. The status 'AWAITING APPROVAL' is highlighted with an orange box. A yellow banner at the top of the guide content says 'A version of this guide needs your approval! You should take care of that.' The guide details include a difficulty of 'Moderate', 11 steps, and a time requirement of 'Suggest a time ??'.

Create Release

Version Type: ☐ Major ☒ Minor

Version: 3.1

Release Title (optional):

Release Notes

What's new in this release?

Once approved, publish: 10/20/2021

Users can train on this immediately after approval

HANSAW Lock Out Tag Out Procedures

v3.1 m **AWAITING APPROVAL** Quality Approval 10/20/2021 by Carl Roberts

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

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**.