Holocentric

Release Management

Antoinette France - 2023-08-22 - Manage Content

Release Management in Holocentric Connect

Release management features provide you with a version control tool designed to help you create a structured release management workflow for your organisation.

It is a set of features that can only be completed by people with a relevant User Authorisation Role assigned. It includes:

- a workflow to publish an item (e.g. a policy or process), including draft, review, approve and publish states
- a workflow to delete an item (e.g. a policy or process), including approve deletion and delete on publish states
- a workflow to publish one item or multiple items at the same time, and automatically create a news item on the Welcome sub-tab
- version control information/history for each item—this includes changes to both the web-app interface and the PDF documents.

In release management, customers retain access to all previous web app editing options.

This article includes the following topics:

1. Create, edit and publish item
2. Deleting content
3. Publish multiple items in one release
4. Release notes and news items
5. Edit release notes
6. View version control information
7. Disable release management

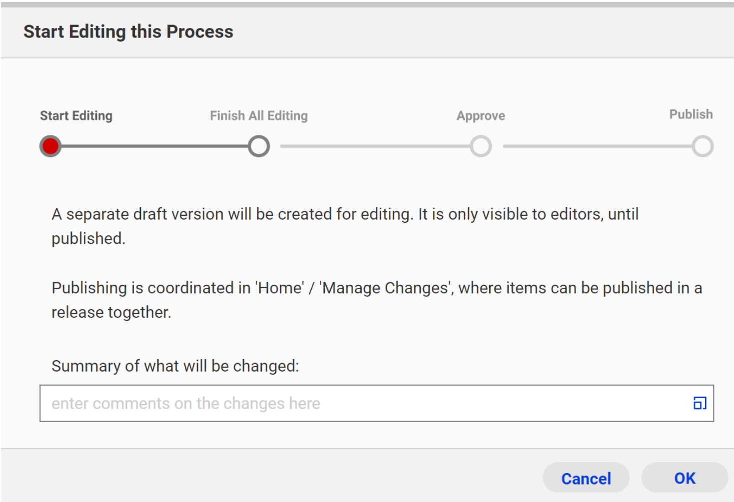
Workflow overview

Release management workflow refers to the steps that you need to take to finalise and record information about content changes. Content changes include:

- updates to an existing policy, process, document or role
- creation of a new policy, process, document or role
- deletion of a policy, process, document or role
- updates to, creation or deletion of a work instruction (if you have requested for work instructions to enabled).

1. Create, edit and publish item

There are four key phases in the release management workflow when you are creating, editing, and publishing any content. When you enter a new phase by working on a single item you will always see a timeline representing the workflow. This timeline indicates where you are in the workflow. At each stage, you can write and edit the summary of what was/will be changed.



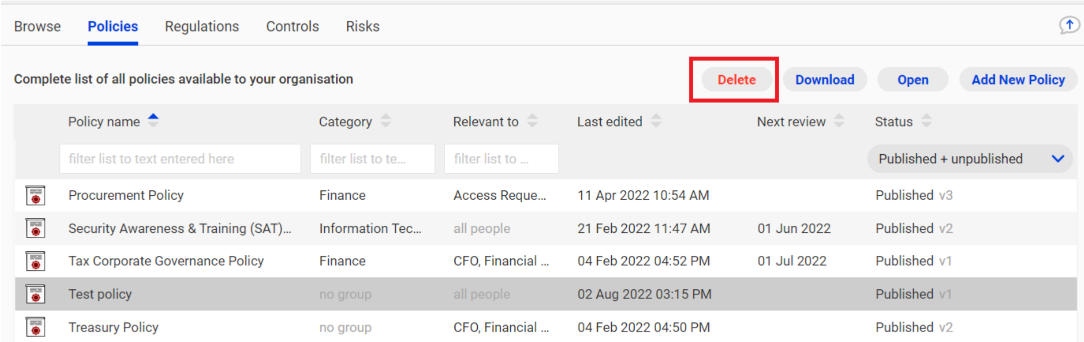
Workflow step	Description
Start Editing	An item in this stage is marked ‘Draft’. At this stage you can edit content by making all required changes and/or additions.
Finish All Editing	An item in this stage is marked ‘Awaiting approval’. You can either approve the document (if you agree with all changes) or revert it back to the ‘Draft’ state to make further changes.
Approve	An item in this stage is marked ‘Ready to Publish’. You can either publish the document (if you agree with all changes) or revert it back to the ‘Draft’ state to make further changes.
Publish	An item in this stage is marked ‘Published’. It is online and available for non-administrators to view. If you have assigned the content to a specific role, only people that have that role within the system can view the content.

Note: Review your content carefully at every stage. Once you have reached the end of the workflow and published your content, you **cannot** revert the item to an earlier version (e.g. if you have fully published version 3 of a policy, you will not be able to revert to version 2 within the web app).

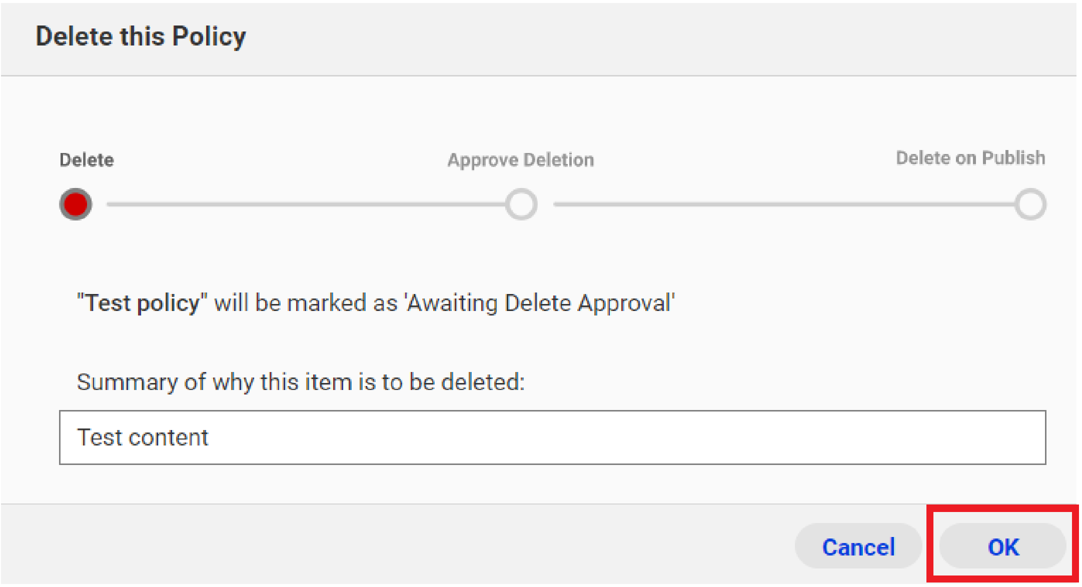
2. Deleting content

Content deletion within release management is subject to a workflow similar to that which determines content editing and creation. It is comprised of three key steps.

2.1 Locate the item you wish to delete and click the **Delete** button.



2.2 A **Delete this [policy]** workflow will appear. Enter a summary of why this item is being deleted and click **OK.**



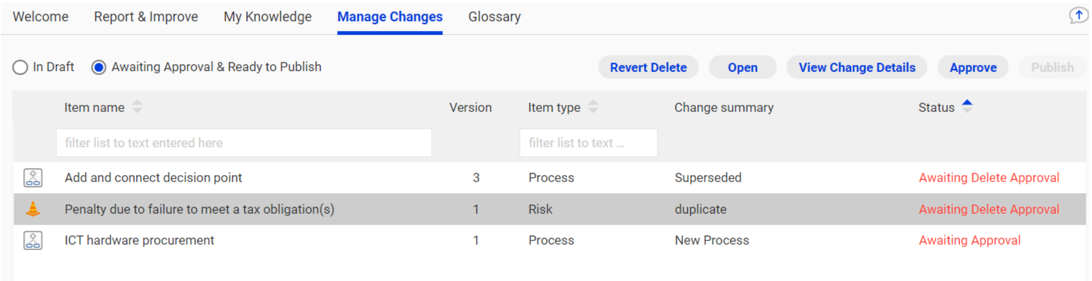
Workflow step	**Description**
Delete	Content in this stage is marked ‘Awaiting Delete Approval’. You can either approve it for deletion or reverse the deletion.
Approve deletion	Content in this stage is marked ‘Delete on Publish. If you agree that the item should be deleted, you can finalise the deletion. At this stage, you still have the option to revert the deletion if required.
Delete on publish	Content in this stage is permanently removed from the system. It will not be visible to any users.

2.3 Follow the workflow prompts to **Approve deletion.** A publishing button will appear, click **Delete immediately, Continue, Publish**.

3. Publish multiple items in one release

While you can publish each update/deletion individually, you can also make multiple changes at the same time. If all the changes are published at the same time, they are part of the same release.

Access the **Home** tab and click **Manage Changes** to view all items within the system that are pending deletion/publication. Use the top bar to manage item changes.



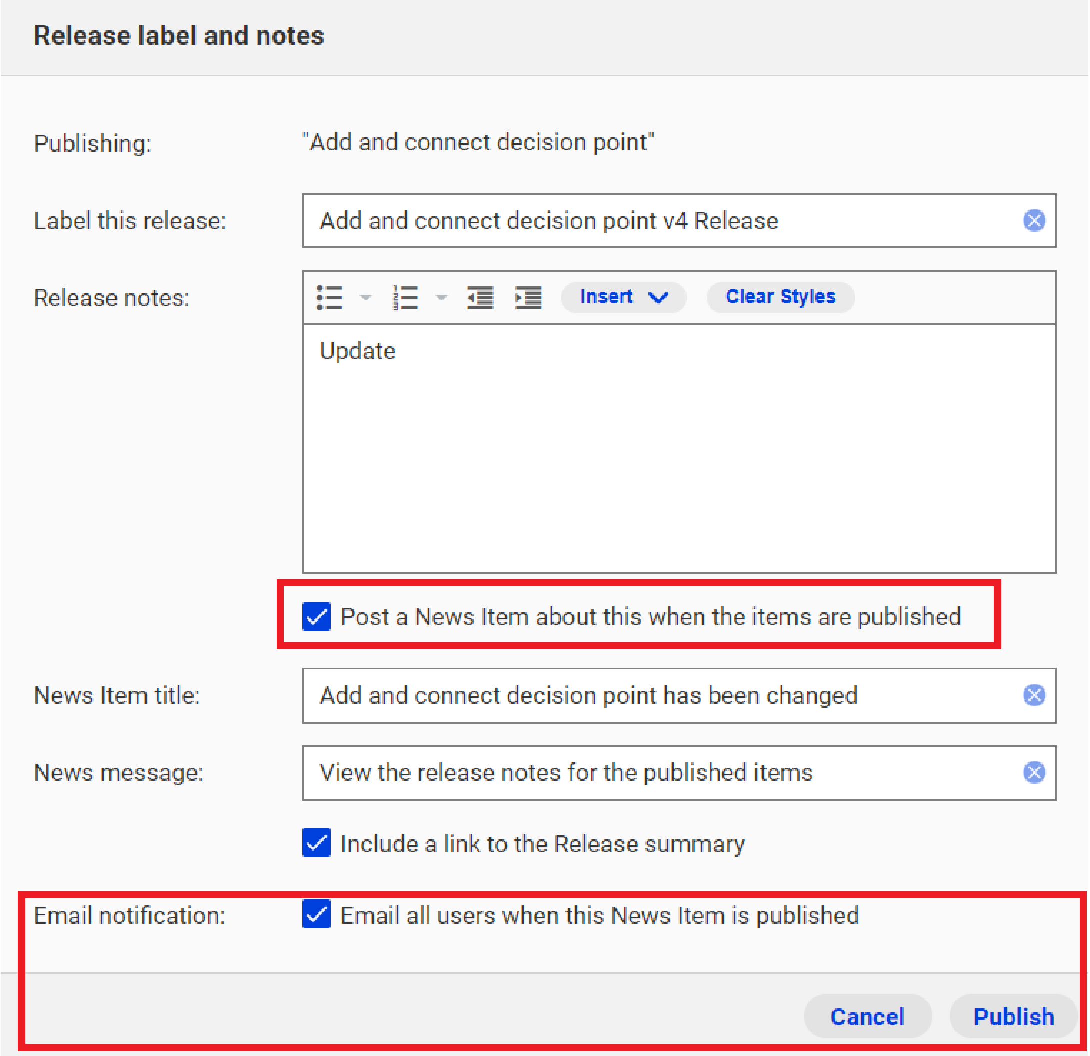
4. Release notes and news items

When you are about to publish an item (or several items), you are asked to write **Release notes**. Release notes are a record of all the content changes you have made (e.g. added a new policy, deleted a document, updated a process) as well as reasons for the changes.

Tip: You can edit your release notes later if required. See ***5. Edit Release Notes*** *in this article.*

To notify users about the release tick **Post a News Item about this when the items are published**. If this is selected, a news item appears in the **Home** tab of your Holocentric Connect site. Tick **Include a link to the Release Summary** to link the release notes to the news item.

You can also send an email notification to all activated web app users in your organisation by ticking **Email all users when this News Item is Published.**

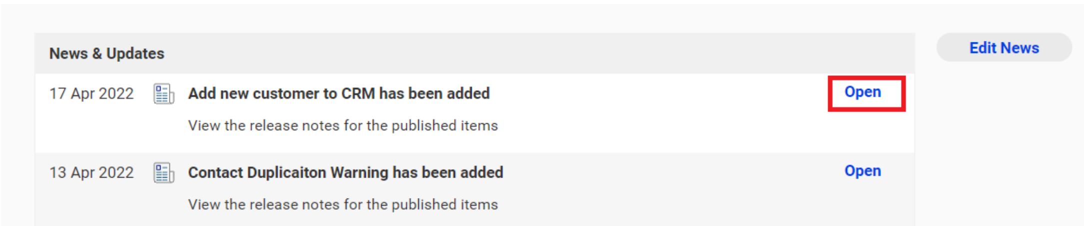


5. Edit release notes

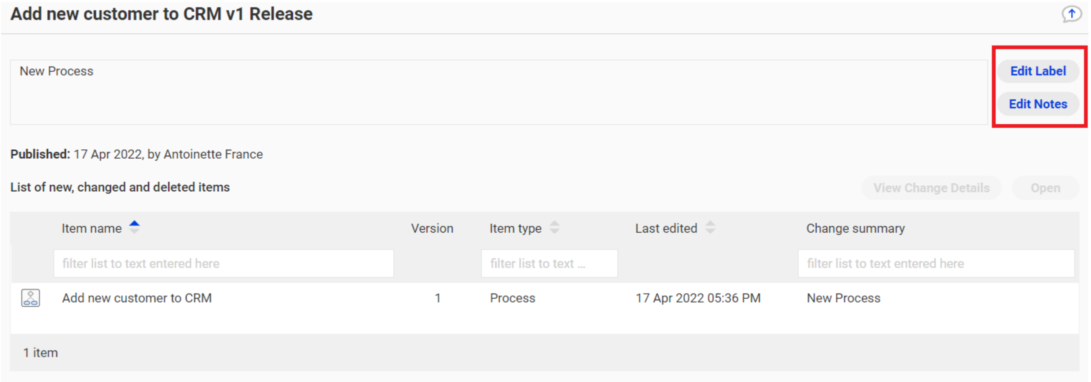
Release notes are a summary of all the updates you have made to content in your web app. Every time you publish a new item (or items), you can write release notes. Once your item/s have been published and release notes completed, you have the option to edit these release notes.

5.1 There are two ways to access the editing functionality for release notes:

- **Option1**. If you **have** created a news item for the release notes, access the **Home** tab and find the release note under **News & Updates**. Click **Open** on the item you would like to edit *(Tip: you can also double click on the line item to open)*



You will then be able to edit the release label and the accompanying notes by using the edit buttons.

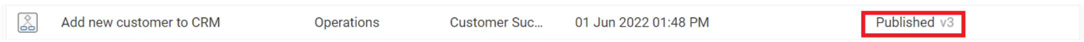


- **Option 2.** If you **have not** created a news item, access the **Admin** tab and click the **Publication History** subtab. Find the relevant release and double click it. The same screen will appear.

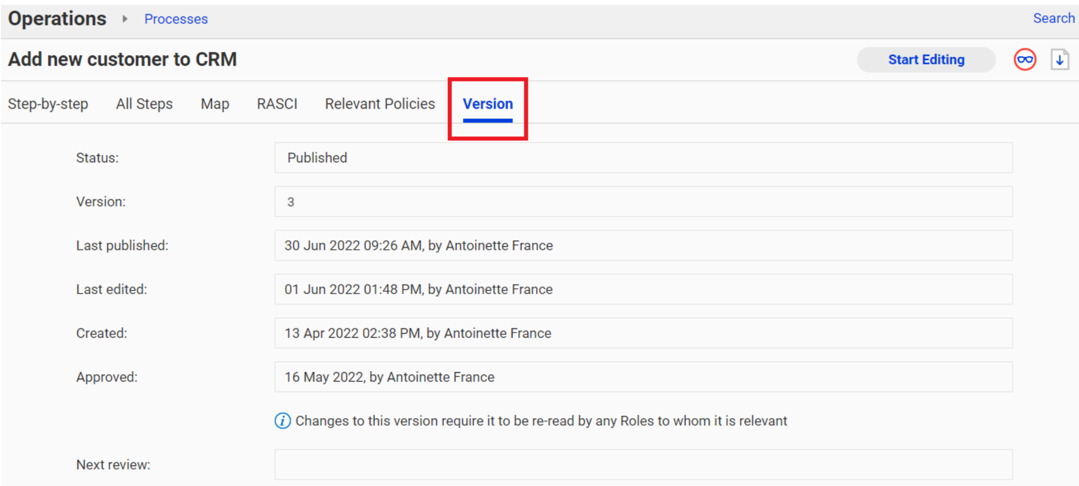
6. View version control information

As part of release management, you have access to version control information about each item in your system. This information is automatically generated when you edit, approve and publish items.

Version control information can be viewed in different ways. The version number is available in the list view.



When you open any item, click on the **Version** subtab. This shows you all version control information for that item. The information you will see will differ depending on your subscription level.



Note: When you download your content as a PDF, the version control information for each item is available under the heading for that item.

7. Disable Release Management

When you disable release management, all other features will still be available.

IMPORTANT

You cannot disable Release Management until all unpublished versions (including content that is awaiting approval and publication) are either published or deleted.

Overall, we strongly recommend that you carefully consider which option is best suited to your document management practices. Version control is vital for recording content management information and ensuring compliance.

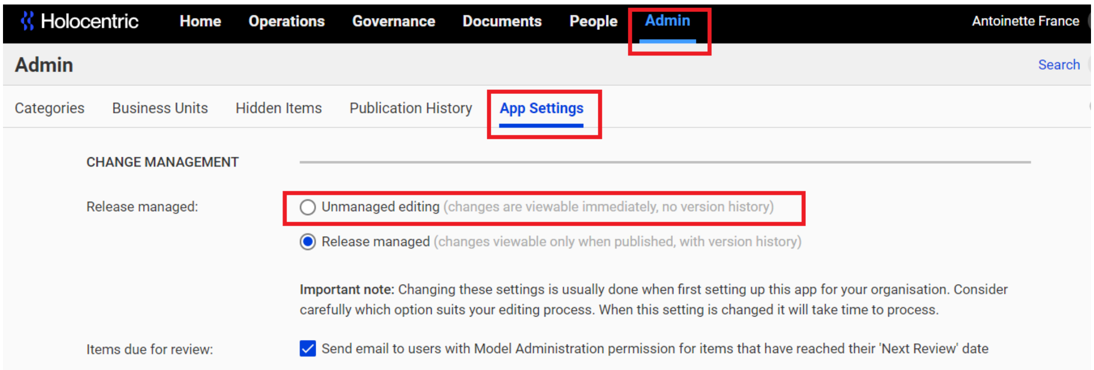
If you change content while working without release management, your version number will not be automatically updated and there will be be no official release notes for your changes.

To disable release management, refer to the steps below.

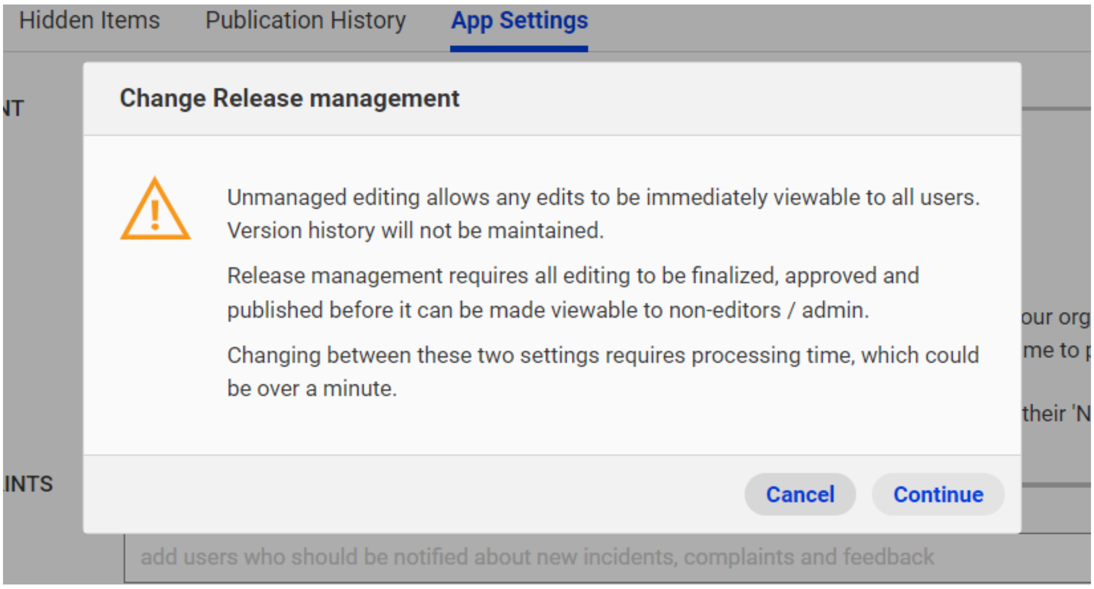
Note: only system Administrators and Model Administrators can enable and disable release management.

7.1 Access the **Admin** tab and click **App Settings**.

7.2 Select **Unmanaged editing.**



7.3 A warning message appears. Click **Continue** to disable release management. This may take over a minute. To re-enable release management, return to **App settings** and select **Release management**.


Hidden Items
Publication History
App Settings
NT
Change Release management
Unmanaged editing allows any edits to be immediately viewable to all users. Version history will not be maintained.
Release management requires all editing to be finalized, approved and published before it can be made viewable to non-editors / admin.
Changing between these two settings requires processing time, which could be over a minute.
our org
me to
their 'N
INTS
Cancel
Continue
add users who should be notified about new incidents, complaints and feedback

END