



# Create a version

Last Modified on 06/12/2024 4:09 pm EDT

Creating versions for custom content categories and articles function slightly differently, since the two editors are laid out differently. Choose the editor you want to work with below to see correct instructions:

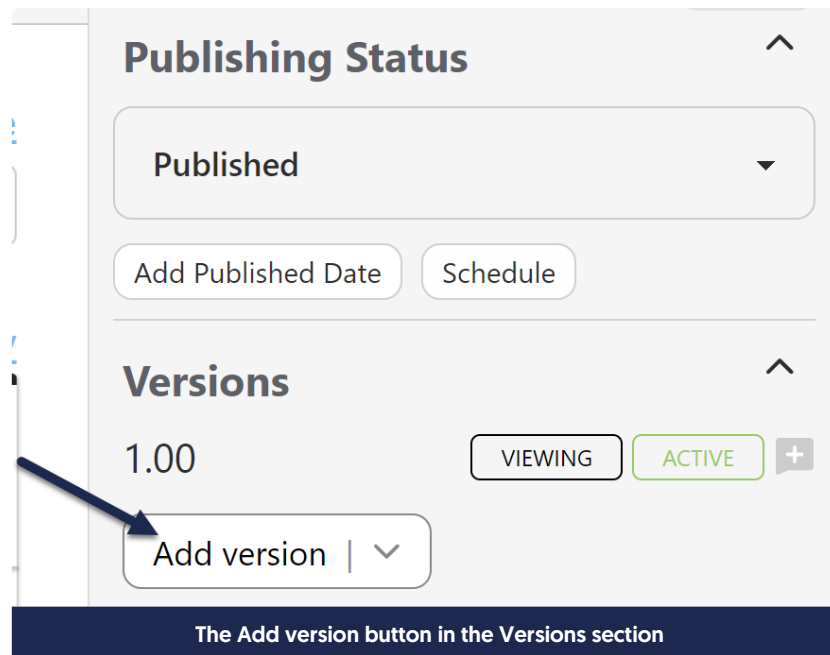
[Article](#) [Custom content category](#)

## Article Editor

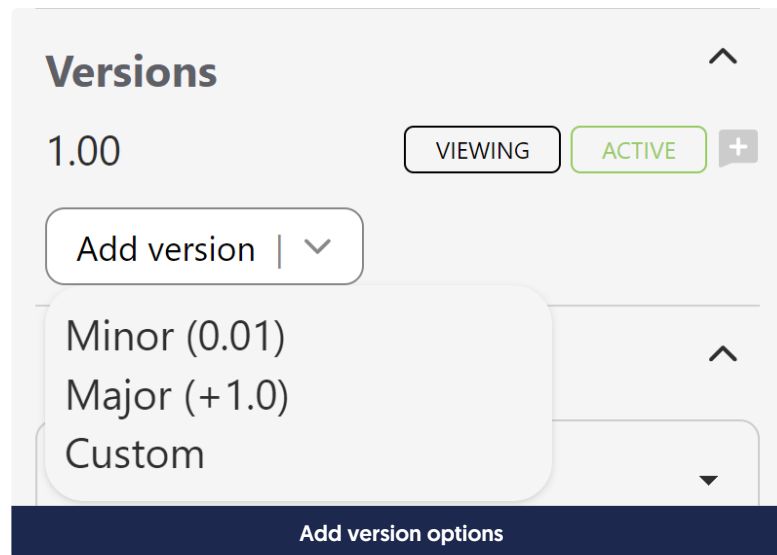
Authors with the default Editor or Writer role can create article versions. If you're using a [custom role](#), you'll need to have the [Article Permission](#) to Create new versions of articles.

To create a version for an article:

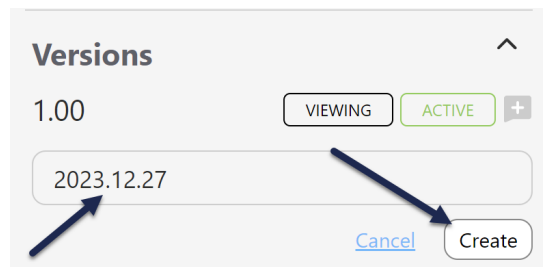
1. Open the article in the editor.
2. In the **Versions** section near the top of the righthand column, click the **Add version** button.



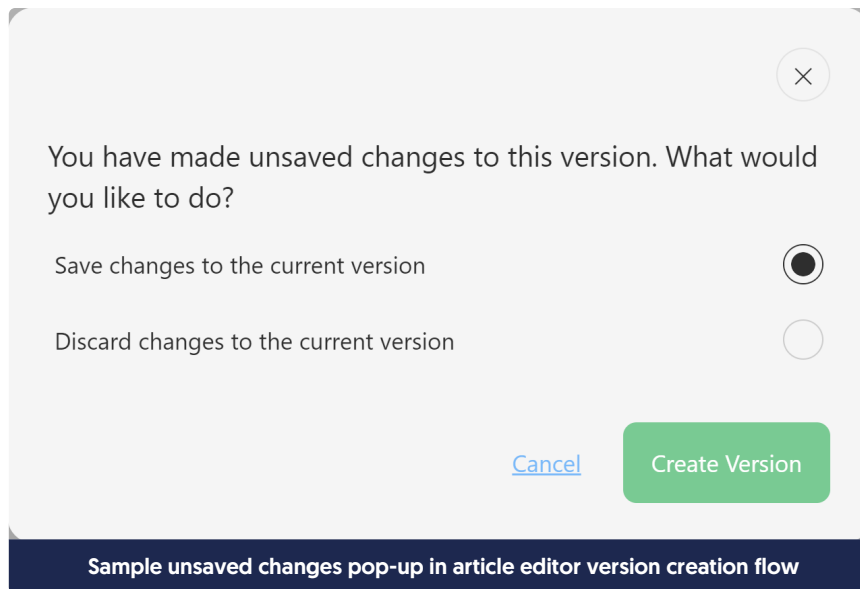
3. From the Add version dropdown, select the version numbering convention you'd like to use.



- a. Selecting **Minor (+0.01)** will create an automatically numbered minor version from the current active version. So if you only have version 1.00, Minor will create a new version numbered 1.01. If you select this option, you'll immediately be taken to the next step.
- b. Selecting **Major (+1.0)** will create an automatically numbered major version from the current active version and any other major versions. So if you only have version 1.00, Major will create a new version numbered 2.00. If you select this option, you'll immediately be taken to the next step.
- c. Selecting **Custom** allows you to manually add your own version number. We like to use dates for ours! If you select this option, a text box will appear for you to add your custom version number. Click **Create** once you're done adding it. The version is created and the editor updates to open that version.



4. If you had no unsaved changes in the editor when you began creating your new version, the new version is created from the current active version and the editor will refresh to open to that new version.
5. If you had any unsaved changes in the editor when you began creating your new version, you'll see a pop-up warning you of these changes and asking you how you'd like to proceed:

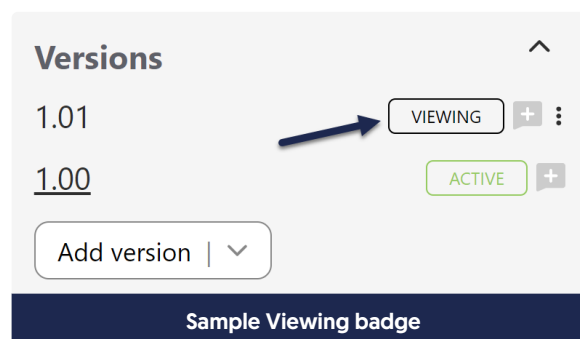


6. You can choose to:

- a. **Save changes to the current version:** If you select this option and then **Create Version**, your edits in the current version will be saved before the new version is created. If you were editing the current active version, you'll see those edits reflected in both the current version and the newly-created version. (This option is selected by default.)
- b. **Discard changes to the current version:** If you select this option and then **Create Version**, your edits in the current version will be discarded.
- c. **Cancel:** This option will cancel the creation of the new version and return you to your unsaved changes in the editor. This can be a good option if you want to copy the current changes without saving them to the current version.

- 7. Once you make your selection and choose **Create Version**, the new version is created from the current active version and the editor will refresh to open to that new version.

The version you're currently viewing will have a black Viewing badge to the right:



With your new version created, you can begin making edits to that version.

You can toggle between different versions by clicking on the version number. All versions are displayed in reverse chronological order (with the most recent at the top). Versions with **notes** will have a yellow notes icon to the right; versions without notes will have a grey icon with a white plus sign. You can click the icon to view the notes.

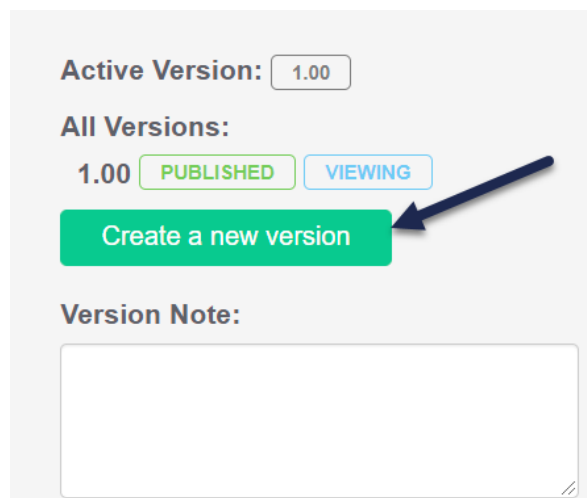
You can make as many changes to the new version as you'd like. They won't show until you **Activate** this version.

## Custom Content Category Editor

Authors with the default Editor or Writer role can create custom content category versions. If you're using a **custom role**, you'll need to have the **Category Permission** to Edit categories.

To create a version for a custom content category:

1. Open the custom content category in the editor.
2. Click the **Create a new version** button in the **Versions** section of the right hand column.



3. This will open a dropdown where you can select the Version you'd like to use. If this is your first time creating a version for this article, the current live article will be version 1.00.

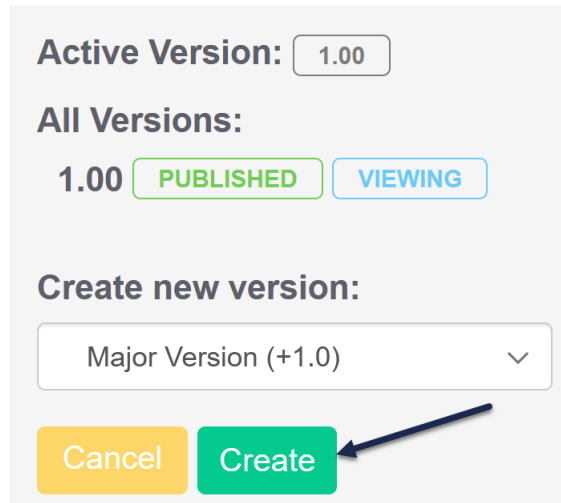


- a. Selecting **Minor (+0.01)** will create an automatically numbered minor version from the current active

version. So if you only have version 1.00, Minor will create a new version numbered 1.01.

- b. Selecting **Major (+1.0)** will create an automatically numbered major version from the current active version and any other major versions. So if you only have version 1.00, Major will create a new version numbered 2.00.
- c. Selecting **Custom** allows you to manually add your own version number. We like to use dates for ours! If you select this option, a text box will appear for you to add your custom version number.

4. Once you've made your selection, click the **Create** button.



Active Version: 1.00

All Versions:

1.00 PUBLISHED VIEWING

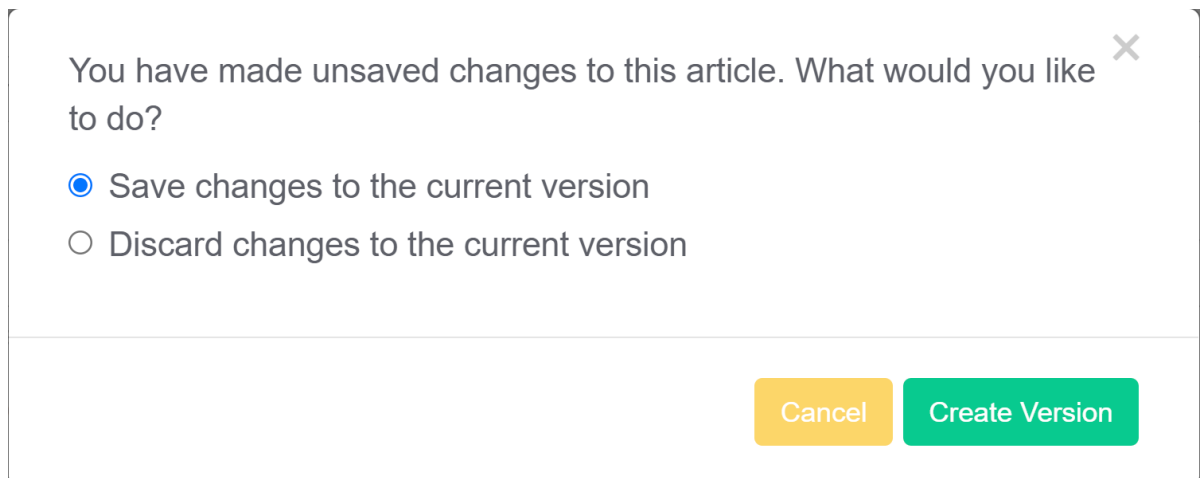
Create new version:

Major Version (+1.0)

Cancel Create

5. From here, one of two things might happen:

- o If you have unsaved changes in the editor when you try to create the version, a pop-up will appear over the editor asking you what you'd like to do with those unsaved changes:



You have made unsaved changes to this article. What would you like to do?

Save changes to the current version

Discard changes to the current version

Cancel Create Version

You can choose to:

- **Save changes to the current version:** If you select this option and then **Create Version**, your edits in the current version will be saved before the new version is created. You'll see those edits reflected in both the current version and the newly-created version. (This option is selected by

default.)

- **Discard changes to the current version:** If you select this option and then **Create Version**, your edits in the current version will be discarded. The current version and newly-created version will both contain the current version's content as it existed before you started editing.
  - **Cancel:** This option will cancel the creation of the new version and return you to your unsaved changes in the editor. This can be a good option if you want to copy the current changes without saving them to the current version.
  - **Once you make your selection and choose **Create Version**, you'll continue to see the steps listed below.**
6. If you have no unsaved changes in your editor (or you continued with the **Create Version** process after specifying what to do with the changes), the new version will be created by taking a copy of the current version.
  7. Once your new version is created, you will automatically be taken to the new version to perform your edits.
  8. You can toggle between different versions by clicking on the version number. All versions are displayed in reverse chronological order (with the most recent at the top).



You'll see a badge showing which version is currently **Published** and which version you are currently **Viewing**.

You can make as many changes to the new version as you'd like. They won't show until you **Activate** this version.