



Release Management CMS Extension

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Document History

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Release Management CMS Extension Overview

The CrownPeak CMS provides robust workflow and publishing configuration options, allowing content and CMS assets to be deployed in any format, and to any destination.

The native deployment behavior in the CMS is applied at the asset level. This is done by selecting a single asset, and applying a deploy action from the Workflow menu on the selected asset. Currently this capability cannot be applied to multiple assets, and as such, there is no direct way of deploying multiple assets in the CMS.

The only native method of doing so is by using the admin Route function which allows admins to change the workflow state of any asset, and by applying the change to other assets using the “Also Applies To” capability.

This document describes the Release Management CMS extension which extends the native capabilities of the CrownPeak CMS, allowing admins to define and create bundles of assets to be deployed together in a batch process.

CrownPeak subscribers should consider leveraging this CMS extension to take advantage of the following capabilities:

- Bundle assets for deployment purposes based on various criteria
- Release the bundled assets upon review and approval
- Provide audit reports of bundled assets and deployment details

Benefits of Release Management

The Release Management Extension extends the native deployment capabilities of the CrownPeak CMS with the following:

- Ability to bundle or group site assets into a Release
- Asset selection is done by any combination of the following:
 - Workflow state
 - Asset folder
 - Manual asset selection
- Basic release assets are configured as follows:
 - They are submitted for review and approval prior to deployment
 - They provide a detailed report of what assets are bundled in the release
 - They also provide an audit log of when the bundled assets were deployed
- Custom or advanced Release configurations can be made based on customer business requirements

Configuring Release Management

The Release Management extension can be configured to support many business processes. Before starting the configuration, it is beneficial to solidify the scope of the configuration. Use this list to determine how the customer is going to use Release Management in their instance.

Does the customer want to deploy multiple assets simultaneously?

What criteria should be used for bundling of assets in a release?

- Are assets grouped together based on their workflow state? For example, deploy all Stage assets to Live.
- Are assets grouped together based on their folder? For example, deploy all press releases located in the Press Releases folder.
- Are assets grouped together via manual selection?
- Or a combination of the above?

Will releases require review and approval prior to deployment?

Any other business requirements that may impact the scope and implementation of the CMS Extension?

Once the Business Process is understood, configuring Release Management is done as follows:

Setup and Installation

Release Management, like other CMS Extensions, is a collection of best practices, library methods, templates, models, assets with a dedicated Workflow configuration that together provide the overall framework necessary to enable the management of Releases in the CMS.

The framework is typically setup and installed by CrownPeak Support and Expert Services.

Once the necessary underlying framework is setup and configured, the next step is configuring Release Management for each site requiring the capabilities.

Release Management enjoys its own dedicated Release Workflow which determines the lifecycle of Releases. The following is the default workflow configuration.

Configuring Release Management for a Site

Release Management is easily added to a site by simply placing the **_Releases** folder in the root of the site.

The **_Releases** folder contains a configuration file, which provides the following configuration options:

- Supported workflow states
- Workflow state relationships: what state can be deployed to what other state(s)?
- Is individual file selection supported?
- Is file selection by folder supported?

Using Release Management

Release Management adheres to CrownPeak authoring and content management best practices. Defining and creating a new “Release” is accomplished by using the Release model found in the _Releases folder.

Create a Release

To create a release:

1. Select New > Release
2. Define the release by providing a unique release name and description.
3. Select the bundled assets; by Workflow state, by Folder, or by individual asset selection.

Submit Release for Review

Once the assets are added and the release is fully defined, the release can be Saved, and submitted for review.

Deploy Release

Based on the configuration, admins can be notified to review the submitted release, and once approved, the release can then be deployed.

Release Details

At anytime, a detailed report of selected assets can be viewed by simply Previewing the Release Asset.

Notes and Additional Information

More information can be found in

https://connect.crownpeak.com/products/product_features/marketplace_connectors_and_dashboard_widgets

Implementation Guidelines

In general, the default installation of Release Management can be completed in about 4 hours.

The effort required for further customization of Release Management will depend on the business requirements.

Playbook Notes

<https://connect.crownpeak.com>