

Single-sourcing topics in Paligo

V1

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We're moving away from our old information architecture and towards our new one. The new information architecture is designed around product areas rather than the Cloud and Platform. This means that we need to single-source Cloud and Platform content. To ensure consistency, we need guidelines on how to do this.

This doc outlines style guidelines for single-sourcing Privacera docs in Paligo and explains how to structure your topics.

What do we mean by single-sourcing?

For our purposes, all it means to single-source content is to combine both the Cloud and Platform versions of a topic into a single Paligo topic.

When to single-source

You can single-source topics when you have a task that can be done on both Cloud and Platform, but is done differently depending on which version of Privacera the customer is using.

For example, let's say we have two topics: *Do X on Privacera Platform* and *Do X on PrivaceraCloud*, where *X* is the same task. The conceptual information about the task is the same for both Cloud and Platform, but the way to complete the task, the actual steps involved, will be different.

So, a single-sourced version of this topic would be simply titled *Do X*, with a subsection detailing how to do X on Cloud, and another detailing how to do X on Platform.

Rules for single-sourcing in Paligo

Follow these guidelines when single-sourcing your topics in Paligo.

Single-sourced topic structure

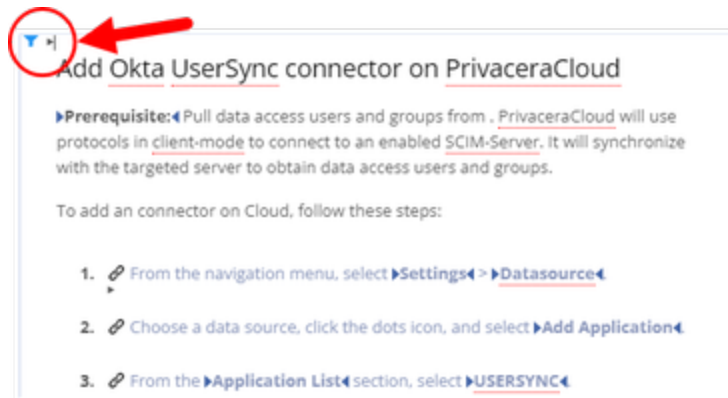
Use the following structure when single-sourcing:

- **Title:** *Configure X*
 - **Conceptual info:** Introduce the topic with conceptual information that is the same for both Cloud and Platform
 - **Sub-section:** *Configure X on Privacera Platform*
 - **Sub-section:** *Configure X on PrivaceraCloud*

The Platform and Cloud subsections should be `<section>` elements with the `<xinfo:product>` attribute applied. The `xinfo` attribute helps identify which sections apply to which version of Privacera and will allow us to generate custom publications for customers.

How to apply the `<xinfo:product>` element to a section

1. Select the section element by clicking just above the title of the section.



2. In the **Element attributes** section beside the editor, click **Add attribute**.
3. Search for **xinfo:product** and select it from the dropdown.
4. Select either **Cloud** or **Platform** and click **Apply**.

Example single-sourced topic

Here's an example UserSync topic that's been single-sourced using the structure described above:

Add Okta UserSync connector

Shared conceptual info. More conceptual info is needed here.

You can use [UserSync](#) to connect to [Okta](#) for the purpose of connecting, pulling, or serving as data access users.

Add Okta UserSync connector on Privacera Platform

To add an [Okta](#) connector on Platform, follow these steps:

1. Enable Privacera [UserSync](#):


```
cd ~/privacera/privacera-manager
cp config/sample-vars/vars.privacera-usersync.yml config/custom-vars/
```
2. Enable the connector:


```
cd ~/privacera/privacera-manager
cp config/sample-vars/vars.privacera-usersync.okta.yml config/custom-vars/
vi config/custom-vars/vars.privacera-usersync.okta.yml
```
3. Edit the following properties:
 - **OKTA_CONNECTOR**: The name of this connector
 - **OKTA_ENABLED**: The enabled status of the connector (true/false)
 - **OKTA_SERVICE_URL**: The Okta endpoint URL
 - **OKTA_API_TOKEN**: The API token for auth to OKTA API
 - **OKTA_SEARCH_USER_GROUPONLY**: Syncs only users that are members of groups (true/false)

Heading conventions

Here's how we're going to title topics and sections on the new docs site:

| If the content... | Then title it... |
|-------------------|-------------------------------------|
| Is single-sourced | <i>Do/configure/enable (etc.) X</i> |

| | |
|---|-----------------------------------|
| Applies only to Platform | <i>Do X on Privacera Platform</i> |
| Applies only to Cloud | <i>Do X on PrivaceraCloud</i> |
| Is the same for both Cloud and Platform | <i>Do X</i> |

Obviously the title is not always going to be *Do X*. It might be a reference topic called *Acme custom properties* or a conceptual topic called *Acme overview*. Use your judgement. A title like *Acme custom properties on PrivaceraCloud* works.

What if a single-sourced topic is *ridiculously* long?

If, after you single-source a topic, the result is a massive unreadable page, you need to make the subsections expandable and collapsible. Nobody wants to scroll through all that junk. You can make the subsections collapsible in Paligo by applying a `role` attribute to the `<section>` element and giving it the value `accordion`.

To do this:

1. Select the section element by clicking just above the title of the section.
2. In the **Element attributes** section beside the editor, click **Add attribute**.
3. Search for **role** and select it from the dropdown.
4. Enter **accordion** into the automatically selected value field.

Now you can generate and HTML5 output to see the results. The subsection will now be collapsed by default, and you can expand them by clicking the heading.