

# Using the workflow summary topic at

Originally, I created workflow summary topics at past jobs to help me understand how our sophisticated security products could aid users in their various use-case workflows. Seeing how these topics benefitted me, I introduced them to the product user guidance using intelligent content principles.

## ▷ What is a workflow summary topic and how it's used

- For a complex product, a workflow summary topic could be used to summarize the steps necessary to complete the start-to-finish workflow that the product was designed to accomplish. Workflow summary topics can also be used to summarize alternative workflows and any various use-case work efforts.
- A workflow summary topic is a consolidated group of steps based on procedure topics within the user guidance.
- A workflow summary topic can also be a procedure to setup and configure an app or system. In this case, the topic is typically named “Deployment overview”.
- All the necessary details should be provided in a workflow summary topic, using a structure where users can opt into additional information as needed.
- A workflow summary topic is an alternative to searching out content from within the user guidance. For some users, a workflow topic may be a more practical way of receiving information they need to complete their workflow.

## ▷ Structure of a workflow summary topic

- A workflow summary topic is scalable content designed to serve the beginner, intermediate, and advanced user. Supporting this goal is a structure where the user can opt into additional detail as needed—either through drop-down text and/or by branching out to a relevant topic or topics.
- A workflow summary topic works best when regular topics are comprised of topic segments (snippets in our case). These segments can be repurposed in the workflow summary topic step, which would be a condensed version of a topic.

### Topic title

- This could be repurposed from the regular topic within the guide.
- Though minimalism principles are used to create workflow summary topics, topic titles should be as complete as possible.

### Intro text

- Thoroughly introduce the workflow under the “About” label.
  - Describes the scope of the workflow. The main workflow topic should cover all the functionality of the product, from the beginning of a workflow to its completion.
  - Specify any special conditions/caveats pertaining to the flow of the workflow summary.
- Define the audience (if necessary) using the “Audience” label.

- If the audience of the user guidance is specified in an intro section, the audience only needs to be defined if it differentiates from what was specified earlier.

**Note:** The labels (e.g., **About**, **Audience**) are in bold, 50 percent gray font in order to identify their respective content without being overbearing.

### Location path

- Using a simple, minimalistic format, this statement precedes a step or group of steps and describes the location in the product UI where the procedure is to be performed.
- If topics are structured using topic segments (Title, About, Procedure, Location, See also, FAQ), the location path could be repurposed from the relevant topic.

### Steps

- A step in a workflow summary topic could reference a task topic in the user guidance and can also reference concepts and reference topics to support the step. Content from concept and reference topics (topic segments) can be “extracted” as support text for steps when needed.
- A step should present enough information for at least an intermediate user to complete it successfully. Therefore, an intermediate user should be able to complete a workflow summary topic without having to opt into additional info, or rarely need to.

### ▷ Purpose/Benefits of a workflow summary topic

- Easily identify workflow progress
- Increased accessibility – user can jump directly into a procedure in the workflow
- Expose new product features
- Expose power of the product
- Serve all user types
- Increase awareness of alternative and various workflows
- Quicken work efforts
- Strategic use of content (involving repurposing)

## ▷ Example overview

### Start-to-finish workflow summary

#### About

Describe who the workflow topic is for and if there are any condition associated with the workflow in the topic. State what will be accomplished by completing workflow summary topic from start to finish. This could be repurposed text.

#### Audience

Describe who the workflow topic is for.

#### Procedure

##### Step 1. Complete task.

Location: menu item > nav item > screen

- Often a step with no sub-steps has a detailed title repurposed from the topic associated with this step.
  - When sub-steps are involved, this step is general. Specific actions are in the sub-steps.
  - Intro text could be provided to describe what the step accomplishes.
  - Intro text could be provided to describe what isn't obvious about the step and any conditions associated with the step.
  - Intro text could be provided to briefly describe the technology (concepts) related to a step or sub-steps. A "See: [Concepts topic](#)" may be necessary.
  - Intro text can be the intro ("About") text from the topic associated with this step.
- a. Do this for step 1.
- The step name can be (should be) repurposed from the topic associated with this step.
  - If the step text itself is not adequate, then text can be provided here to further describe what the step accomplishes.
  - Text can also describe what's not obvious about the step and any certain conditions associated with the step.
  - Text can be (should be) the intro ("About") text from the topic associated with this step.

#### More ▼

- Text could be concepts text repurposed from a concepts topic related to the sub-step. A "See: [Concepts topic](#)" may be necessary.
- Text could describe nice-to-know info that isn't essential to completing the step.

- Text could describe info and/or an action that isn't essential to completing the step but could enable the user to do more (for advanced users).
- Screen capture could be provided here if necessary.
- All these could apply, or a combination of them, or only a single item.

See: [Task topic](#)

b. Do this for step 1.

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## New feature

Describe the feature and its purpose, and then have a statement like... “The <feature> enables you to <do something cool>”.

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See: [Task topic](#)

c. Do this for step 1.

This text describes what the step accomplishes if the step text itself is not adequate. It also describes what isn’t obvious about the step and any unique conditions associated with the step. This text can be the intro (“About”) text from the topic associated with this step.

More ▼

- Text could be concepts text repurposed from a concepts topic related to the sub-step. A “see: <concepts topic>” may be necessary.
- Text could describe nice-to-know info that isn’t essential to completing the step.
- Text could describe info and/or an action that aren’t essential to completing the step but could enable you to do more (for advanced users).
- Screen capture could be provided here if necessary.
- All these could apply, or a combination of them, or only a single item.

See: [Task topic](#)

Step 2. Complete task.

Location: menu item > nav item > screen

See: [Task topic](#)

Step 3. Complete task.

Location: menu item > nav item > screen

*Note this step only has an action statement because it's a simple task. A See: [Task topic](#) statement may not be necessary. It may add no value.*

#### Step 4. Complete task.

Location: menu item > nav item > screen

- Often a step with no sub-steps has a detailed title repurposed from the topic associated with this step.
- When sub-steps are involved, this step is general. Specific actions are in the sub-steps.
- Intro text could be provided to describe what the step accomplishes.
- Intro text could be provided to describe what isn't obvious about the step and any conditions associated with the step.
- Intro text could be provided to briefly describe the technology (concepts) related to a step or sub-steps. A "See: [Concepts topic](#)" may be necessary.
- Intro text can be the intro ("About") text from the topic associated with this step.

See: [Task topic](#)

#### Step 5. Complete task.

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### New feature

Describe the feature and its purpose, and then have a statement like... "The <feature> enables you to <do something to enhance your workflow>."

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Location: menu item > nav item > screen

- a. Do this for step 5.
  - Non-obvious result
  - Additional action you can perform in this stepSee: [Task topic](#)
- b. Do this for step 5.  
See: [Task topic](#)

## ▷ Working example: Okta + Salesforce provisioning guidance

### Workflow summary

#### About

The Okta integration with Salesforce enables organizations to use Single Sign On (SSO), Okta Provisioning, or SSO + Okta Provisioning. This guidance describes how to configure Okta Provisioning for Salesforce. It also describes alternative configuration options, including customizing attributes and alternative use cases for the Salesforce application integration in general.

The steps contained here are a summary of the aforementioned functionality.

#### Audience

Admins of the Okta + Salesforce integration

#### Procedure

##### Step 1. Enable SSO.

Location: Okta > Applications > Applications

- a. Select **Salesforce.com** and then click the **Sign On** tab.
- b. Select **SAML 2.0** and then click **View Setup Instructions**.

[More ▼](#)

Security Assertion Markup Language (SAML) is a standard for logging into applications. This single sign-on (SSO) login standard is more secure and convenient than using a username and password.

##### Step 2. Create an administrator account in Salesforce.

- The account username and password that you specify is used to configure Salesforce in Okta.
- Salesforce provides you with a token that's also used to configure Salesforce in Okta.

Location: Salesforce app

- a. Do something in Salesforce.
- b. Do something in Salesforce.
- c. Do something in Salesforce.

See [Enable Okta Provisioning](#)

##### Step 3. Configure the API for Salesforce integration

Location: Okta > Applications > Applications > Salesforce app > Provisioning

- a. Click **Configure API Integration**.

[More ▼](#)

<screen capture>

- b. Select the **Enable API integration** check box.

[More ▼](#)

<screen capture>

- c. Enter the username and password + token associated with your Salesforce administrator account.
- d. Append the Salesforce token to your password with no spaces or other characters.