



Kelly Gilbert

# WORKFLOW DOCUMENTATION

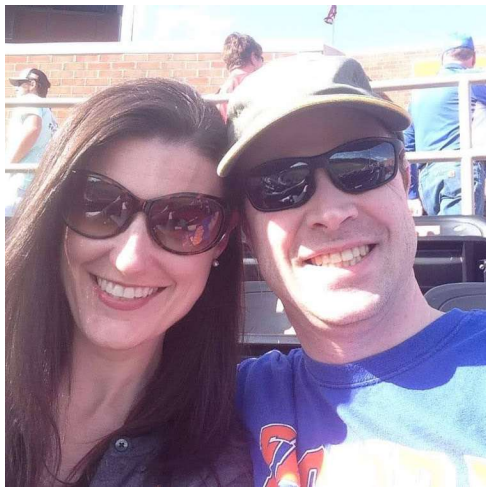
QUICK TIPS TO MAKE YOUR  
WORKFLOW EASIER TO UNDERSTAND



alteryx | The Thrill  
of Solving

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# @KELLY\_GILBERT



**NAME:** Kelly Gilbert

**ABOUT ME:** Principal Data Engineer at Chick-fil-A, Inc.

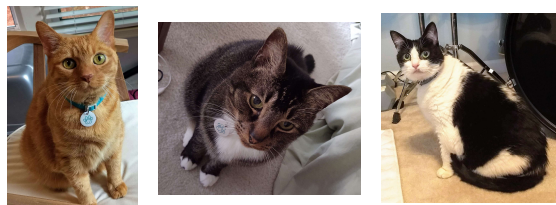
**CAREER:**

- Supply Chain analytics at The Home Depot
- Supply Chain analytics at Chick-fil-A
- People Analytics at Chick-fil-A

**WITH ALTERYX I CAN...** automate analytics processes and reach insights faster

**WHEN I USE ALTERYX, I FEEL...** empowered to handle tricky data issues

**2020 ALTERYX GOALS:** Remain on the top Weekly Challengers list, encourage my coworkers to participate in Weekly Challenges and certification, participate in #AlteryxofCode



You can find me at [kelly\\_gilbert](#) on the Alteryx Community and Twitter

# AGENDA

- Why document?
- Documentation elements
- Meta info
- Workflow templates



# CONSIDER THESE SCENARIOS

- I built this a year ago, and it needs to be updated
- I'm submitting this work to a colleague or client for code review
- I am passing this work off to a colleague (or client) who will maintain it
- I have less-experienced colleagues (or clients) who will maintain it
- I have less-experienced colleagues who might want to learn from my workflow



**WHAT IS HAPPENING HERE?**

When thinking about documentation, here are some scenarios to consider.

Last bullet – especially if you have a private gallery, don't underestimate how often someone will download your workflows to learn how they work.

Image at bottom – actual workflow from a consultant. It's an amazing piece of work, but not fun to maintain!



# GOAL

Help the user (quickly) understand what is happening in the workflow.

When we think about documenting and annotating a workflow, this is the goal that we're trying to achieve. Keep this in mind when you're thinking about where to document and how much detail to add



# TOOL ANNOTATIONS

The first and most useful tool in our documentation toolbox is annotations.



# TOOL ANNOTATION: WHAT IS IT?



What is it? It's the label below/next to a tool.

# TOOL ANNOTATION: HOW TO USE IT



The screenshot shows the configuration window for a Filter tool annotation. The window title is "Filter (211) - Annotation". It contains the following fields and options:

- Tool:** Filter (ID: 211)
- Name:** Filter (211)
- Show Annotation:** Using Canvas Settings
- Place Annotation on the Top
- Annotation:** ToDate([LastWrite Time]) > datetimeadd(datetimetoday(), -7, 'day')

In 2020.1+, just  
press F2 to open!

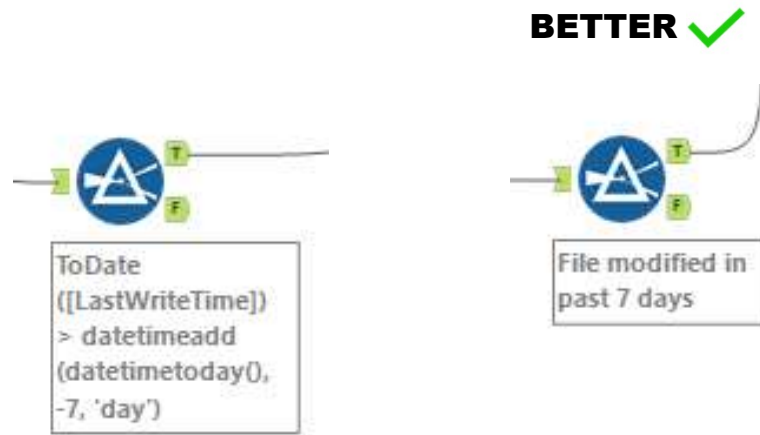
To add or edit annotations:

- Click on the tool
- In the configuration window, click on the tag icon
- Edit or add the annotation text
- Note, in 2020.1+ you can click on the tool and hit F2 to automatically bring your cursor to the Annotation text box



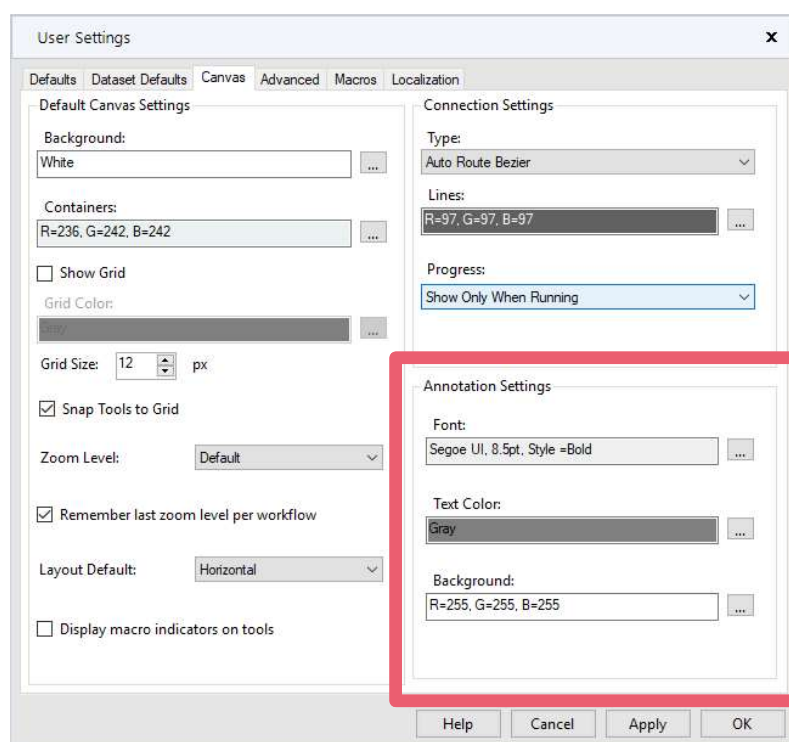


# TOOL ANNOTATION: HOW TO USE IT



Some tools (for example formula or filter) will automatically put the formula in the annotation for you. You may want to edit those to explain generally what the tool is doing (the user can always click on the tool to look at the formula if needed. Often the whole formula is too long to be shown, anyway.

# TOOL ANNOTATION: HOW TO USE IT



## Options

- User Settings
- Edit User Settings
- Canvas tab

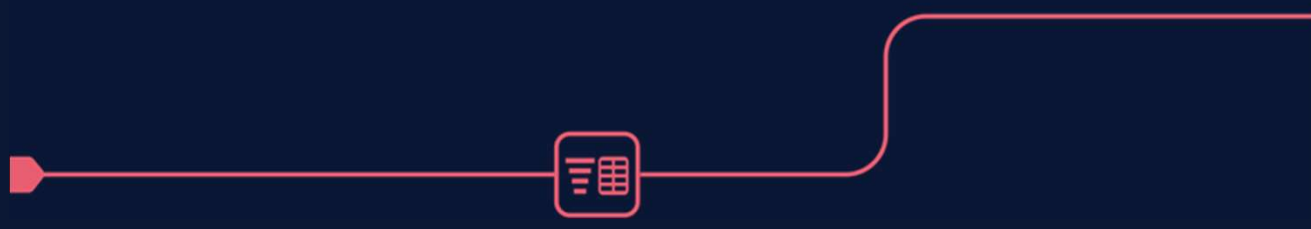
You can change the appearance of annotations (font, colors) in your user settings.

Note that this only changes how annotations appear to YOU (it doesn't change the workflow file itself).



# TOOL ANNOTATION: SUMMARY

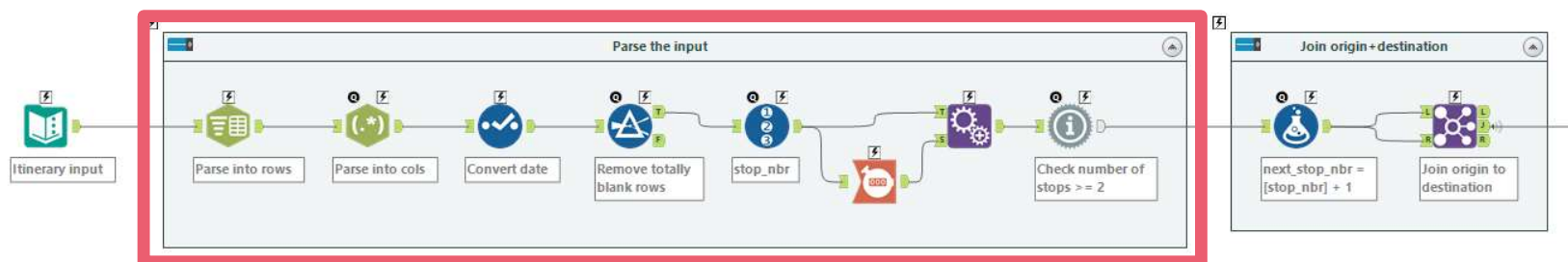
- Use annotations to describe (generally) what the tool is doing
- Edit the pre-populated annotations where necessary



# TOOL CONTAINERS

The next tools in our documentation toolbox are containers

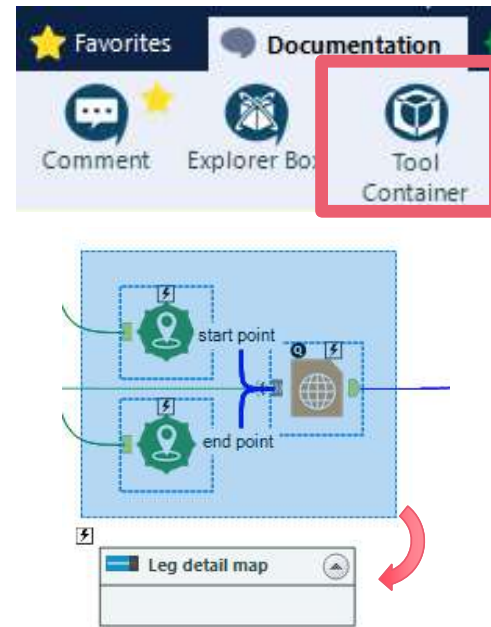
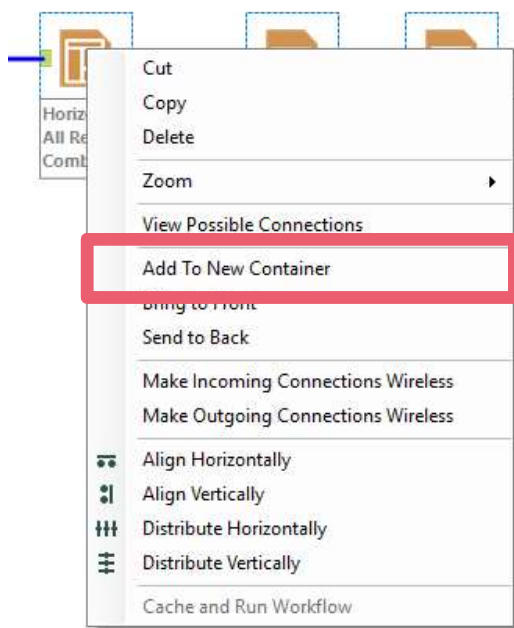
# TOOL CONTAINER: WHAT IS IT?



What is it?

You can find tool containers in the Documentation toolbar. They're boxes that hold groups of tools.

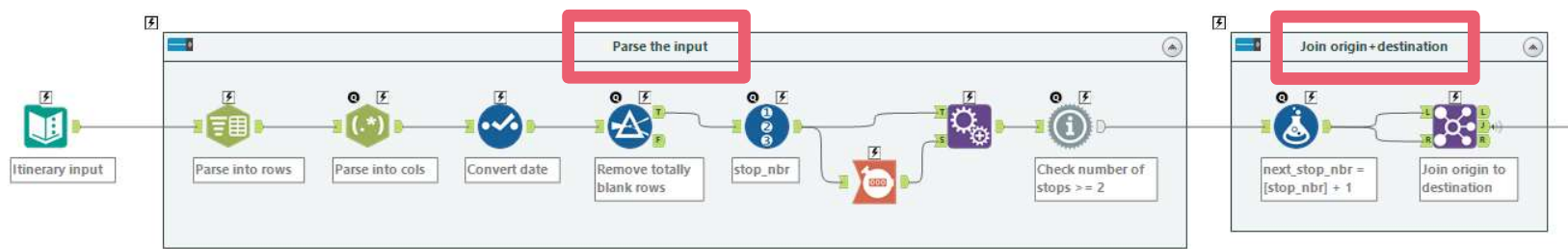
# TOOL CONTAINER: HOW TO USE IT



The best way to add a container is to select your group of tools, then right click and choose Add to New Container.

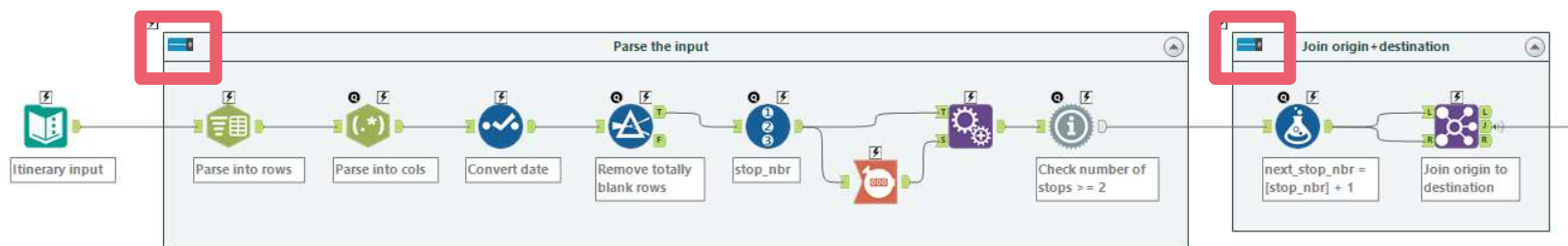
Alternatively, you can drag a container from the palette (it's on the Documentation tab). Then, highlight your tools and drag them into the container.

# TOOL CONTAINER: HOW TO USE IT



Use containers to logically group tools into major steps in the process.  
Use the container caption (in the configuration window) to describe generally what is happening.

# TOOL CONTAINER: HOW TO USE IT



I often see people use comments, rather than tool containers, to create boxes around tools.

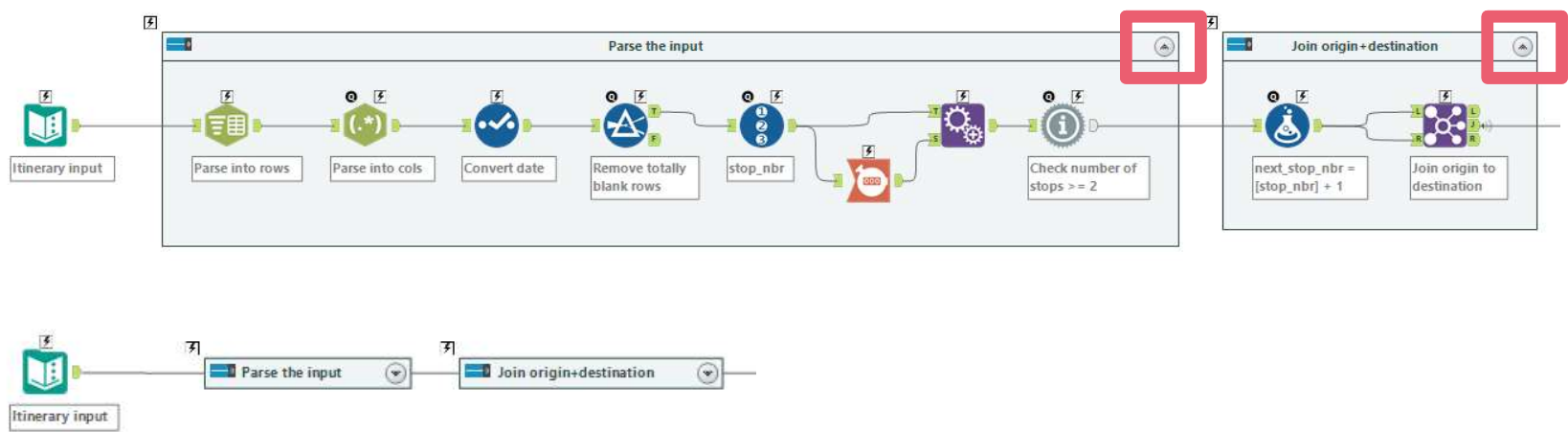
That helps to visually group tools, but tool containers have some other great features...

1 – to move tools, you can just drag the container, and the tools will move with it

2 – you can use this toggle in the upper left corner to disable or enable the container. This is super useful when you are developing or testing a workflow. For example, say you have a bunch of reporting tools at the end of a workflow. Those might take a while to run, so you can just put them in a container and disable it until you get the upstream part of the workflow running properly.

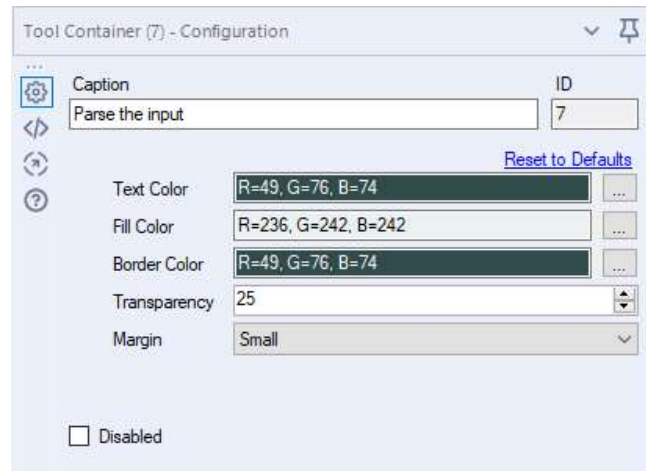


# TOOL CONTAINER: HOW TO USE IT



3 – similarly, you can use the button in the upper right to hide (or collapse) the container to tidy up your workflow

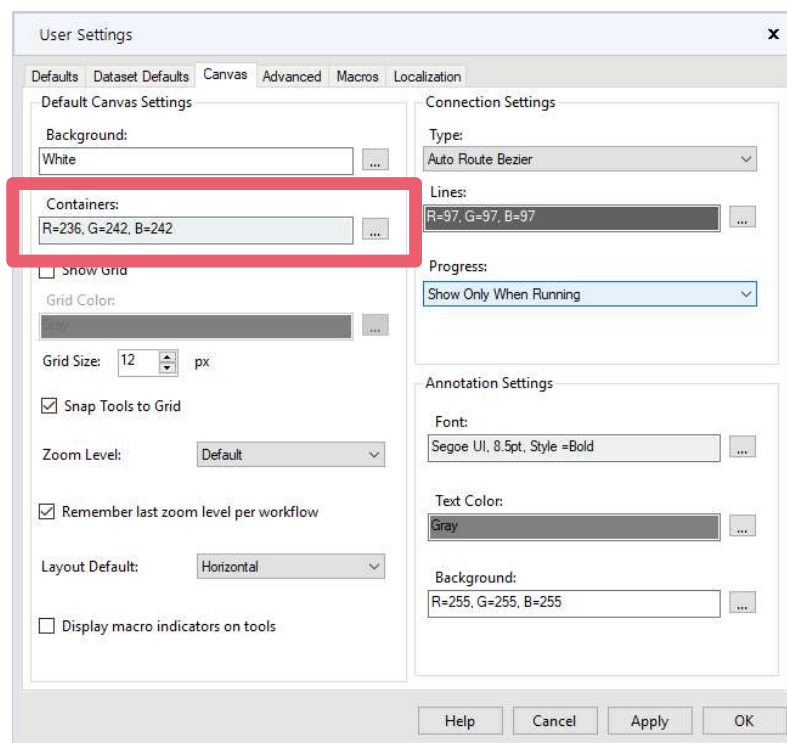
# TOOL CONTAINER: HOW TO USE IT



In the configuration window, you can edit the caption (title) of the container and change the colors.

Be thoughtful about color – use it as you would in a dashboard: to draw attention to something special.

# TOOL CONTAINER: HOW TO USE IT



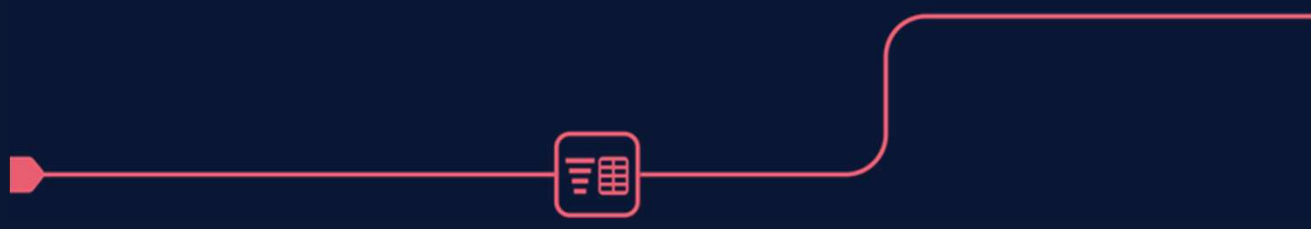
- Options
- User Settings
- Edit User Settings
- Canvas tab

In your user settings, you can change the default color for containers.  
Note, this only applies to new containers (containers added after you change the setting.  
It won't change the color for containers already in the workflow, and it won't change the way containers appear for other users.



# TOOL CONTAINER: SUMMARY

- Use containers to group tools into logical groups or steps
- Use container captions and comments to describe what's happening and add context
- Use containers to disable parts of your workflow while testing
- Use containers to collapse/hide sections of the workflow
- Use fill colors thoughtfully

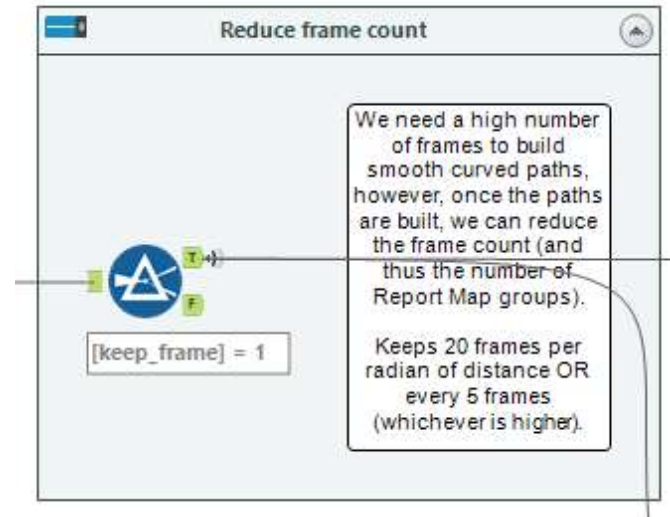


# COMMENTS

The next tools in our documentation toolbox are containers

# COMMENT: WHAT IS IT?

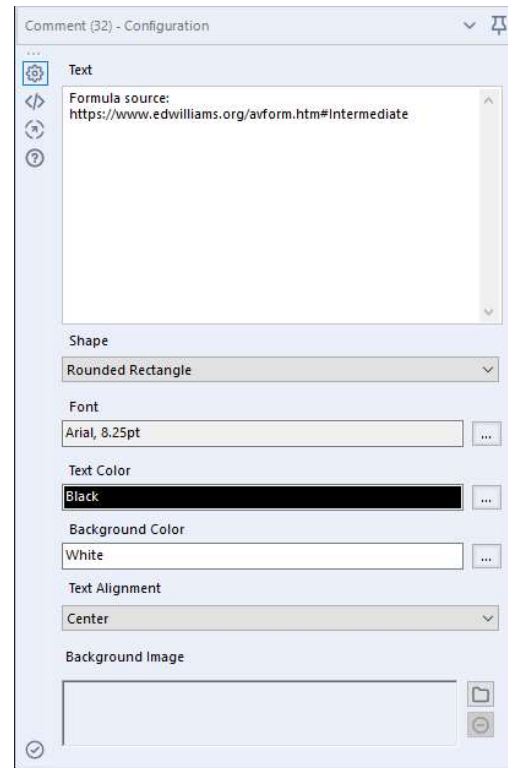
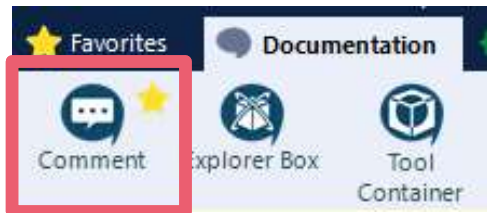
Supervisor EBS ID did not exist in the hierarchy until 2/28/2018, so use supervisor name to group direct reports for report date < 2/28/18



A comment is a text box – use these to add more context or useful notes

Use comments to explain WHY something is happening (frame count example)

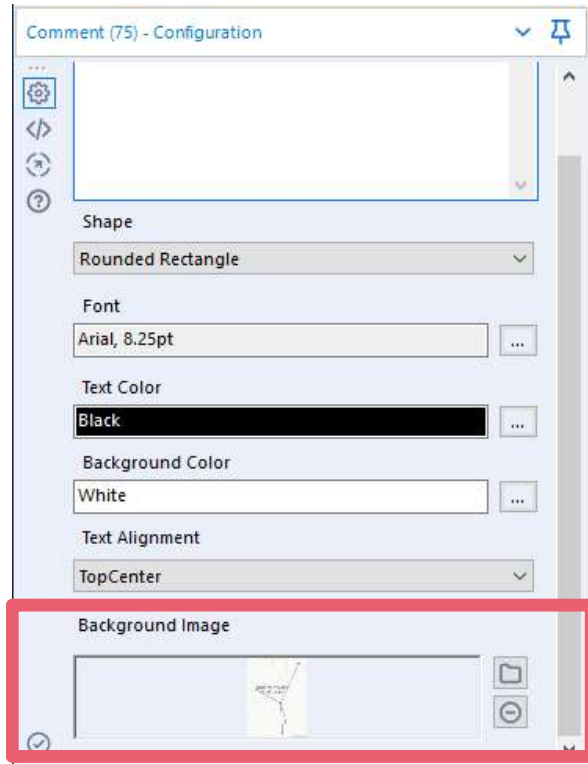
# COMMENT: HOW TO USE IT



Comment is located on the Documentation tab of the tool palette. Just drag onto the canvas.

Use the configuration window to edit the text and colors

# COMMENT: HOW TO USE IT



You can also use comments to display an image

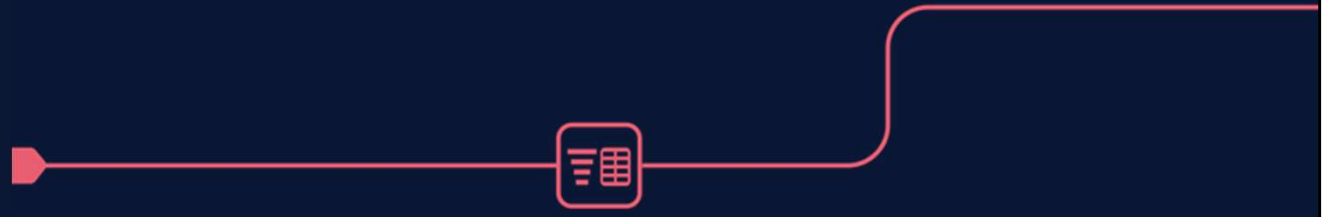




# COMMENT: SUMMARY

- Use comments to add additional context
- Use comments to explain WHY (especially if you've done something nonintuitive)
- Use comments to add helpful figures/graphics (be mindful of file size)

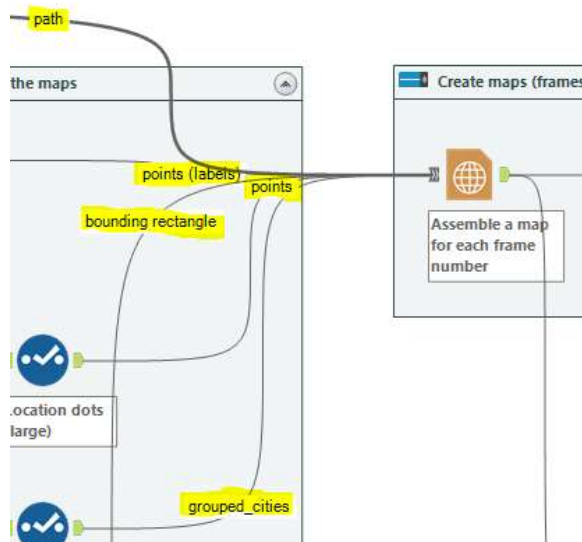
On slides 5-7 you can take screen shots of your workflow or open your Alteryx platform to share your workflow.



# OTHER ANNOTATIONS

A few additional ways to add context to your workflow and help make it easier to read

# CONNECTION LABELS



Connection - Configuration

Name: path

Wireless

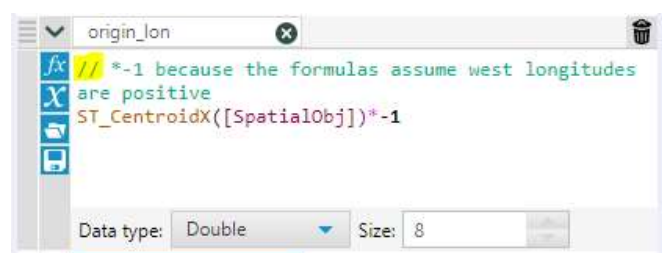
Fields

	Name	Type	Size	Source
1	event_name	V_String	25	(Multiple So
2	event_date	Date	10	(Multiple So
3	event_location	V_String	2147483647	(Multiple So
4	event_order	Int32	4	(Multiple So
5	SpatialObj	SpatialObj	2147483647	(Multiple So

The first option is to name your connections. A connection is just the little line that connects between tools. You're not going to label every connection, but this is very helpful for tools that have multiple inputs, such as the union tool or the Report Map tool. By default, they're just going to be named based on the order you connect them (#1, #2, etc.) To name a connection, just click on the connection (the little line), and then



# FORMULA COMMENTS



Single-line comment:

```
// yourcomment
```

Multiline comment:

```
/*
```

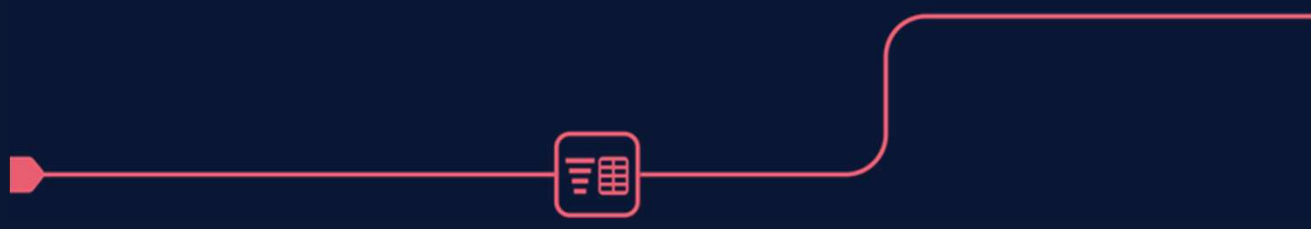
```
First line of comment
```

```
Second line of comment
```

```
*/
```

Another useful way to add context is to add comments to formulas. You can do this in any tool that has a formula box (Formula, Filter, Multi Row, Generate rows)... anything that has a little box where you can type in a formula.

You can add a one-line comment with two forward slashes OR you can add a multiline comment using /\* and then closing with \*/



# META INFO

Meta info is general information about the workflow that affects how the workflow appears in the tool palette and the gallery

# Workflow Meta Info

**1 Controls the name in the tool palette**

**2 Description shown in the gallery and when you click on the tool in the palette**

**3 URL for tool information**  
Optional display text is the link text; if blank, the URL is displayed.

**4 Default tool palette (if installed)**

**5 Name and company Displayed in the gallery**

## How it appears in the tool palette:

**1** Macro - parse iCIMS xls file

**2** Read in an iCIMS xls file (which is actually an HTML file with an xls extension).

**3** [link would go here]

**4** Parse

## How it appears on the gallery:

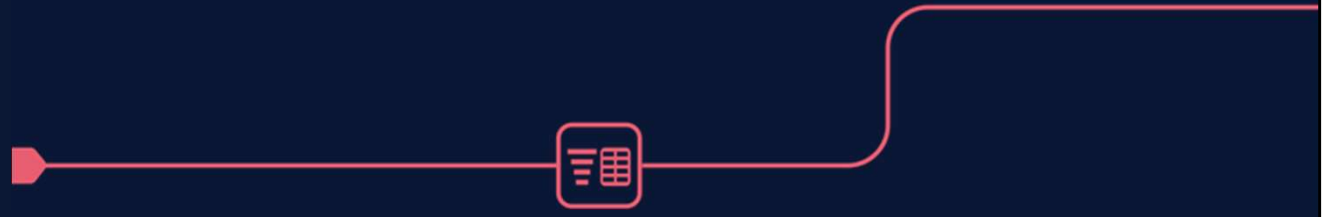
**Interface Designer (Ctrl+Alt+D)**

**2** Read in an iCIMS xls file (which is actually an HTML file with an xls extension).

**3** [link would go here]

**5** Author: Kelly Gilbert

Note: will be available in the deck



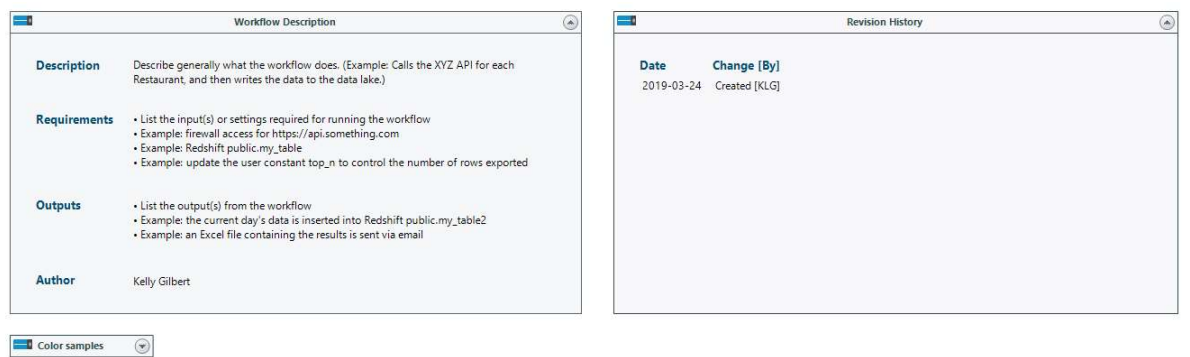
# WORKFLOW TEMPLATES

A great way to help orient users to a workflow is by using a consistent workflow template across users in your organization

# USING A TEMPLATE WORKFLOW

## RECOMMENDED ELEMENTS

- Description
- Inputs
- Outputs
- Author
- Revision history\*
- Specifically-colored containers or elements
- Pre-fill company name in meta info



\* Unless you use some other type of SCM repository

This is an example of the workflow template that I use, but there are many more examples (I'll link to some at the end)





# USING A TEMPLATE WORKFLOW

- Any workflows in the Start Here folder open at startup
- Save your workflow to the Start Here folder (e.g. C:\Program Files\Alteryx\Samples\en\Start Here)
  - Save a copy in another location, in case it is overwritten when you upgrade
- If you have Start Here disabled, you can re-enable:  
Options → User Settings → Edit User Settings → Default tab → check Show Start Here at startup
- To open the template on demand:  
Help → Sample Workflows → Start Here → select your template

On slides 5-7 you can take screen shots of your workflow or open your Alteryx platform to share your workflow.



# TEMPLATES/STYLE GUIDES: SUMMARY

- Keep it as simple as possible
- Use color thoughtfully
- If using specific colors, include pre-colored elements in the template for copy/paste
- Save the template to your private gallery for general access
- Save the template to your Start Here folder to auto-open at startup

On slides 5-7 you can take screen shots of your workflow or open your Alteryx platform to share your workflow.



# RESOURCES AND EXAMPLES

- User groups roundup  
<https://community.alteryx.com/t5/User-Group-Resources/Alteryx-User-Group-Meeting-Round-Up-Content-Index/tap/315975>
- Alteryx Standards Document at Celgene (NJ AUG)  
<https://community.alteryx.com/t5/New-Jersey-NJ/2020-Q2-NJ-User-Group-meeting-Recap/gpm-p/575971>
- Style guide and standards mega-thread:  
<https://community.alteryx.com/t5/Alteryx-Designer-Discussions/Alteryx-Standards-Document-Feedback-Requested/mp/557933>
- Keyrus auto-documenter:  
<https://www.keyrus.consulting/blog/documentation-generator-for-alteryx-workflows>  
(Charlotte AUG 9/22 meeting - Bank of America presentation on how they are using it and modifications they made)

Hayes Williams had a great presentation in the April NJ AUG on a standards document  
Collected a mega-thread on templates, style guides, and standards

# TAKEAWAYS



- Use documentation tools to **quickly orient the user to the workflow**
- Use documentation to **explain (generally) what the workflow does**
- Use documentation to **add context** (why)
- Use a **consistent workflow template**
  - Save it to your private gallery
  - Save it to your Start Here folder to have it open automatically
- Use **meta info** when sharing workflows

