ATLORIA

Managing Project Setup After Initial Onboarding

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Opening an Existing Project from the Administration Area

After a project has been created in Atloria, you do not need to go through the original setup flow again to make changes. Instead, open the existing project from the **Projects** area or switch to it from your current project navigation, then use the project's administration screens to update what you need. If you are not able to edit settings, check that you have a project role with administration access. People with view-only or contributor-level access may be able to open the project but not change setup details.

1. Open **Projects** and select the project you want to update. If you are already inside another project, use the project switcher to move to the correct one.
2. Once the project opens, look for the administration entry points used for project setup. In Atloria, these may appear as tabs or menu items such as **Settings**, **Structure**, **Delivery**, **Integrations**, and **Readiness**.
3. Open each area to confirm what can still be changed. Basic setup details are usually managed from these screens after onboarding is complete.
4. If a field cannot be edited, Atloria may show it as read-only or simply not offer an edit control. That usually means the value is fixed after the project is created, or only a higher-level administrator can change it.

Use this approach when you need to revisit setup without creating a replacement project or repeating earlier steps from Creating Projects and Completing Onboarding.

[SCREENSHOT: Project administration area showing Settings, Structure, Delivery, Integrations, and Readiness navigation]

Before you start changing anything, it helps to review how the project is currently organized by using the navigation patterns covered in Navigating Project Workspaces and Linked Tools. That makes it easier to see where each setup area lives and how your changes will affect the project workspace.

Refining the Project Structure

The **Structure** and **Settings** areas are where you adjust the project's core setup after onboarding. This is the right place to update the project's identifying details and tidy up how work is grouped for your team. Depending on what your workspace shows, you may be able to edit items such as the project name, description, owner, and internal reference details directly in the project form.

1. Open the project and go to **Settings** or **Structure**.
2. Review the main project details. If the fields are available, update the **Project Name**, **Description**, **Owner**, or any internal identifier shown on the screen.
3. In the structure area, add or rename the organizational items tied to the project. These may appear as teams, workspaces, folders, workstreams, or documentation spaces.
4. Open the **Members** or **Permissions** screen to review who can manage, edit, or view the project. Update role assignments where needed so the right people have the right level of access.
5. Click **Save** after each set of changes, then return to the project navigation to confirm the updated names and structure appear as expected.

A few changes are worth checking immediately after saving:

Area you changed	What to review afterward
Project details	Header name, project summary, and any project listing cards
Structure items	Left-side navigation, workspace grouping, and content locations
Roles and access	Who can open the project, edit content, or manage setup

[SCREENSHOT: Project Structure or Settings screen with editable project details and member access options]

If you are reorganizing documentation spaces rather than learning the workspace layout for the first time, keep this focused on cleanup and maintenance. For broader navigation behavior, refer back to Navigating Project Workspaces and Linked Tools.

Changing Delivery and Operational Options

Use the **Delivery** or **Operations** area when you need to revise choices that affect how the project runs after onboarding. These settings are especially important when the project has moved from initial setup into active documentation work. Atloria may present these options as dropdown lists, switches, or confirmation panels, depending on the project configuration.

1. Open the project and select **Delivery** or the related operations settings area.
2. Review the current options that were chosen during onboarding. Look for editable controls such as dropdowns, toggles, or selection cards.
3. Update the available delivery settings shown on the page. These may include items such as environment, delivery method, schedule, region, or service mode if those choices are part of your project setup.
4. Check for operational preferences on the same screen or a nearby tab. Where available, update notification behavior, default assignees, approval-related settings, or maintenance timing.
5. Click **Save** or confirm the change when Atloria asks you to apply the update.

If you are changing settings on a live project, watch for warning messages. Atloria may show a notice before applying a delivery-related change that affects current work, linked options, or readiness status. Read those messages carefully before confirming. Some changes apply as soon as you save them, while others may update only after Atloria finishes a background check or sync.

[SCREENSHOT: Delivery settings screen with dropdowns, toggles, and a warning message before saving changes]

After saving, return to the project header or status area and confirm that the revised delivery choices are reflected there. If a change affects approvals or workflow timing, you may also want to compare it with the project's current operating process described in Managing Project Operations Across Project Home Tabs.

Managing Connected Options and Integrations

The **Integrations** or **Connected Options** area shows which outside services are linked to the project. This is where you maintain connections after onboarding instead of disconnecting and rebuilding the project. In Atloria, these connections may include linked repositories, external workspaces, communication tools, or other supported services used by the project.

1. Open the project and go to **Integrations** or **Connected Options**.
2. Review the list of currently linked services. Each item may show a status, an on/off switch, a **Connect** button, or a settings panel.

3. To change an existing connection, open its settings and update the available details. Depending on the connection, this may include a linked workspace, selected account, sync preference, or other connection-specific choices shown on screen.
4. Enable or disable optional connections using the toggle or action button provided for that service.
5. Save your changes and watch for any messages that explain how the update affects the rest of the project.

Some connected options influence other setup areas. For example, a linked service may affect what appears in **Delivery**, who can access certain project functions, or whether the project is marked ready in **Readiness**. Atloria may display notes or warnings directly in the integration panel when one connection depends on another setting being complete.

[SCREENSHOT: Integrations screen showing connected services, status indicators, and provider-specific settings]

If you need deeper guidance on specific linked tools, use Connecting and Managing External Integrations for the connection process and Configuring Project Webhooks and Related Controls if your project includes webhook-based setup. For this stage, the goal is simply to maintain and adjust what is already attached to the project.

Preparing the Project for Ongoing Use

Once you have updated structure, delivery, and connected options, open the **Readiness** or setup status area to see what still needs attention. This screen helps you move from “created” to “ready for active use” without guessing which setup items remain incomplete. In Atloria, readiness information may appear as a checklist, status badges, or highlighted items that still require action.

1. Open the project’s **Readiness** area or any setup status panel shown in the project administration menu.
2. Review incomplete items one by one. Focus on the tasks Atloria marks as required or blocking.
3. Complete the remaining setup work shown on screen. This may include assigning required owners, confirming documentation locations, enabling notifications, or validating connected services.
4. Save each update and return to the readiness view to see whether the item changes from incomplete to complete.

5. Continue until the project status shows that setup is ready for ongoing work, or until only optional items remain.

A readiness screen is especially useful after several people have updated the project over time. It gives you one place to confirm that the project still has the minimum setup needed for day-to-day use. Pay attention to labels such as partially configured, incomplete, or ready, since those indicators tell you whether Atloria still expects action.

[SCREENSHOT: Readiness screen with checklist items, status badges, and completion indicators]

Not every change updates instantly. Some items switch to complete as soon as you click **Save**, while others may wait for a sync, validation, or connection check. If a checklist item does not clear right away, refresh the page after a short wait and check whether Atloria has finished processing the update.

Verifying Your Setup

After making setup changes, take a few minutes to confirm they are working the way you expect. This final review helps catch small problems before they affect the rest of the team. In Atloria, verification usually means checking that saved values remain in place, access changes behave correctly, and at least one updated connection or delivery-related action responds normally.

1. Reopen **Settings**, **Structure**, **Delivery**, and **Integrations** to confirm your updated values are still there after saving.
2. Open the **Members** or **Permissions** area and check that the revised roles match what you intended for administrators, contributors, and viewers.
3. Ask a team member with one of the updated roles to open the project, or verify access using the role assignments shown in the project access screen.
4. Test one updated connected option or delivery-related setting. For example, open the linked connection panel and confirm it still shows as connected, or revisit the delivery screen and make sure the new selection remains active.
5. If Atloria shows an error, open the affected screen and correct the issue before leaving project administration.

Common issues to look for include:

- Required fields left blank
- Changes not saved before leaving the page
- Permission limits that prevent editing

- Connection problems that require reauthorization
- Warnings that were dismissed without completing the required follow-up

[SCREENSHOT: Saved project settings with success message and visible role or connection status]

If the project still does not behave as expected, compare the current setup with the related project management guidance in Managing Project Administration from the Project Home and Managing Project Settings and Website Options.

Overview

Managing setup after onboarding in Atloria is about maintaining an existing project, not starting over. Once a project is live, the administration area becomes the place where you adjust the project's structure, update delivery choices, maintain connected services, and confirm readiness for ongoing documentation work. This is especially useful when the project has changed owners, expanded to new teams, or needs updated operational settings after the initial launch.

From the user side, the process usually centers on a few key screens: **Settings**, **Structure**, **Delivery**, **Integrations**, and **Readiness**. Together, these screens let you review what was originally configured and make targeted updates without recreating the project. You might rename the project, reorganize documentation spaces, revise role access, reconnect a linked service, or clear remaining readiness items that were skipped during onboarding.

This guide focuses on those post-onboarding adjustments. It does not repeat the original project creation flow covered in Creating Projects and Completing Onboarding, and it does not re-explain general workspace navigation already covered in Navigating Project Workspaces and Linked Tools. Instead, it shows how to return to administration later and make practical changes safely.

Use this guide when:

- The project already exists in Atloria
- You need to update setup choices after onboarding
- You want to confirm the project is still ready for active use
- You need to maintain permissions, structure, or linked options over time

[SCREENSHOT: Existing project open in Atloria with administration tabs visible]

The next step after setup is usually release work. Once your project configuration is in good shape, continue with Running a Documentation Release from Project Workspaces.

Prerequisites

Before you begin updating project setup in Atloria, make sure you can open the project and access its administration screens. Post-onboarding changes are usually made by someone with project-level administrative rights or another role that includes permission to edit settings. If you can view the project but do not see editable controls in **Settings**, **Structure**, **Delivery**, or **Integrations**, your access level may be limited.

You should also have the project already created and available in the **Projects** list or project switcher. This guide assumes the onboarding process is complete and that you are returning later to adjust existing choices. If you still need to create the project or finish first-time setup, use Creating Projects and Completing Onboarding instead.

Before making changes, it helps to have the following ready:

- Access to the correct project in Atloria
- Permission to edit project administration settings
- A clear idea of which area you need to update: **Structure**, **Delivery**, **Integrations**, or **Readiness**
- Any team decisions needed for ownership, access, or connected options
- Enough time to review warnings and save changes carefully

A few practical checks can prevent confusion:

- Confirm you are editing the correct project, especially if several projects have similar names
- Review the current setup before changing it, so you can spot what has been updated
- If the change affects other team members, coordinate role or structure updates before saving
- If a connected service is involved, be ready to recheck its status after the update

[SCREENSHOT: Project selected from the Projects list with administration options available]

If you need help understanding where project tools are located before making setup changes, refer to Working with Project Lists and Dashboards and Managing Project

Administration from the Project Home.