

Configure Documentation Templates

September 10, 2026

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Documentation templates help you establish repeatable standards for the content your organization publishes. By configuring templates, you can make User Docs and Technical Docs more consistent across projects and documentation teams.

Overview

Templates provide a starting point for documentation that follows your organization's publishing and branding standards. Use them when you want documents to use a consistent structure, tone, and presentation instead of being created from scratch each time.

You may need to configure templates before creating documentation manually, importing existing documentation, or generating documentation for a project. This is particularly useful when different audiences require different document types, such as user-facing guides and technical reference material.

The Publishing area includes a Templates step, shown as **5. Templates**. The screen also displays a configuration status, such as **2. Configured**, so you can confirm how many template-related items are currently set up.



Screenshot pending: The Publishing workflow showing the "5. Templates" step and the configured-status indicator.

Prerequisites

Before you begin, make sure you have:

- Access to the project where you want to manage documentation publishing settings.
- Permission to use the **Publishing** area.

- A clear understanding of whether the template is intended for **User Docs** or **Technical Docs**.
- Your organization's documentation standards, such as required sections, terminology, and branding expectations.
- Any existing documentation you want to use as a reference before choosing **Create Manually** or importing existing documentation.

Step-by-Step Instructions

1. Open the project where you want to standardize documentation.
2. Select **Publishing** from the available project documentation options.
3. Review the publishing workflow and locate **5. Templates**.
4. Select **5. Templates** to open the template configuration step.
5. Review the status displayed on the Templates step, such as **2. Configured**, to determine whether template settings already exist.
6. Choose the template purpose you need by identifying whether it will support **User Docs** or **Technical Docs**.
7. Select **User Docs** when the template is intended for end-user instructions, task guides, or user manuals.
8. Select **Technical Docs** when the template is intended for technical reference material or engineering-focused documentation.
9. Use **Create Manually** when you want to create documentation based on your organization's approved template standards.
10. Select **Create New Document** when you are ready to start a document using the configured documentation setup.
11. Select **Create Document** to proceed with document creation after confirming that the selected documentation type and template approach are correct.
12. Choose **Or import existing documentation** when you need to bring existing material into the project instead of starting with a new document.
13. Select **Export Documentation** when you need to distribute completed documentation outside the application after it has been created using your configured standards.

 *Screenshot pending: The document creation area showing “Create Manually,” “Create New Document,” “Create Document,” and “Or import existing documentation.”*

Tips and Best Practices

- Configure standards separately for **User Docs** and **Technical Docs**. These document types often serve different readers and should not rely on the same assumptions about terminology or level of detail.
- Use **User Docs** for content that explains how to complete tasks in the product. Keep the language action-oriented and use the labels that readers see on screen.
- Use **Technical Docs** for implementation, architecture, or technical-reference content. Keep these materials organized so technical readers can locate the information they need quickly.
- Check the **2. Configured** indicator, or the equivalent configured count shown in your workspace, before creating new documentation. This helps you confirm that the expected template-related configuration is available.
- Use **Create Manually** when consistency is more important than speed and you need to follow a defined organizational format.
- Use **Or import existing documentation** when you already have approved content that should be retained. Review imported content afterward to ensure that it meets the same standards as newly created documents.
- Use **Export Documentation** only after reviewing the document for completeness. Exported documentation should reflect the approved template structure and publishing standards.

Related Pages

- [Create a New Document](#)
- [Import Existing Documentation](#)
- [Export Documentation](#)
- [Manage User Docs](#)
- [Manage Technical Docs](#)
- [Configure Publishing Settings](#)

Troubleshooting

The Templates step does not show the configuration you expected

Return to **Publishing** and select **5. Templates** again. Review the configured-status indicator, such as **2. Configured**, to confirm whether template-related settings are available for the current project.

You are creating the wrong type of documentation

Before selecting **Create New Document**, confirm whether the document is intended for **User Docs** or **Technical Docs**. Choose the documentation type that matches the intended audience before continuing.

You need to use existing content instead of starting a new document

Select **Or import existing documentation** rather than **Create Manually**. After importing, review the content to make sure it follows your organization's current documentation and publishing standards.