

Edit and Format Documentation

September 10, 2026

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Use the **Editor** to revise existing documentation and apply consistent formatting that makes content easier to scan and understand. Clear structure helps readers find instructions, requirements, and important details quickly.

Overview

Atloria lets you manage documentation from the **Documents** area. When a document needs updated wording, corrected information, or clearer organization, you can open it in the **Editor** by selecting **Edit**.

Formatting is especially useful when a document contains multiple procedures, long explanations, or lists of requirements. Use the Editor toolbar to apply the appropriate formatting to selected content so headings, paragraphs, and other content types are visually distinct.

After you finish editing, return to the document list with ← **Back to Documents**. From there, you can continue managing documents, search for another document, or use **Export Documentation** when you need an exported version.

 *Screenshot pending: The Documents screen showing the Search documents... field and the Edit action for a document.*

Prerequisites

Before you begin, make sure you have:

- Access to the Atloria **Documents** area.
- A project selected, if prompted by **Select a project to view documents**.
- An existing document that you are permitted to edit.
- The revised text, links, or other information you want to add.

- A plan for the document structure, such as which sections should become headings or lists.

Step-by-Step Instructions

1. Select **Documents** from the application navigation.
2. Select a project if the page displays **Select a project to view documents**.
3. Enter a title or keyword in the **Search documents...** field to find the document you want to revise.
4. Select **Edit** for the document you want to change.
5. Select the content in the **Editor** that you want to revise.
6. Type the replacement text directly over the selected content.
7. Place the cursor where you want to add new content.
8. Type the new content in the Editor.
9. Select the text that should be formatted as a section heading.
10. Select the appropriate heading control from the Editor toolbar.
11. Select the text that should remain standard paragraph content.
12. Select the paragraph formatting control from the Editor toolbar.
13. Select a group of related items that readers should scan individually.
14. Select the appropriate list formatting control from the Editor toolbar.
15. Select the text that needs a different emphasis or presentation.
16. Select the relevant formatting control in the Editor toolbar.
17. Review the edited section in the Editor to confirm that headings, paragraphs, and lists are visually distinct.
18. Select ← **Back to Documents** when you are finished editing.



Screenshot pending: The Editor with document content selected and the formatting toolbar available above the editing area.

Tips and Best Practices

- Use headings to divide a document into meaningful sections. A reader should be able to understand the document's structure by scanning its headings.
- Keep each heading focused on one topic. For example, separate prerequisites, instructions, and troubleshooting rather than placing them in a single long section.
- Use standard paragraphs for explanations and context. Use lists when readers need to review several related items, such as required access, materials, or outcomes.
- Format only the text that needs formatting. Select the exact words, line, or group of items before using an Editor toolbar control. This helps prevent nearby content from receiving an unintended format.
- Keep instruction steps short and action-oriented. Start each step with a clear action, such as "Select," "Enter," or "Review."
- Review the document after every substantial revision. Check that a heading is not being used as ordinary body text and that a list does not include unrelated paragraphs.
- Use the **Search documents...** field instead of manually browsing a long document list when you know part of the document title or a relevant keyword.
- Use **Edit Description** when the document's description needs updating separately from its main content. Keep the description concise so users can identify the document from the **Documents** list.
- Select **Export Documentation** only after reviewing your changes. Exported documentation is easier to use when the on-screen version is already well organized and readable.

Related Pages

- [Manage Documents](#)
- [Create a New Document](#)
- [Export Documentation](#)
- [Edit Description](#)
- [Compare Document Versions](#)
- [Edit Configuration](#)

Troubleshooting

You cannot find the document you need to edit

Enter a distinctive word from the document title or content in **Search documents....** If no documents appear, confirm that you selected the correct project when Atloria displays **Select a project to view documents**.

The formatting change affects the wrong text

Select the affected content again, then use the appropriate Editor toolbar control only after confirming the selection includes the intended text. Review nearby headings and paragraphs to make sure they were not changed unintentionally.

You are unsure whether you are editing the document content or its description

Use **Edit** to revise the document in the **Editor**. Use **Edit Description** when you only need to change the document's descriptive summary or list-facing description.