

Use Document Authoring Quick Actions

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Quick Actions help you begin common document-authoring work without first browsing through the full document list. Use them when you want to create a document quickly or move directly to document management tasks for a project.

Overview

Quick Actions are available from your project dashboard and provide a fast starting point for document work. Instead of navigating through **Documents** and locating the appropriate command, you can use the **Quick Create** action to begin creating a new document.

This feature is especially useful when you are working within a specific project and need to capture documentation immediately. After you start the creation process, you can enter the document information and use the document workspace to continue authoring.

Quick Actions complement the main **Documents** area. Use Quick Actions for a fast entry point, and use **Documents** when you need to search, review, delete, export, or manage multiple documents.



Screenshot pending: Project dashboard showing the Quick Actions area and the Quick Create option.

Prerequisites

Before you begin, make sure that:

- You are signed in to Atloria.
- You can access the project where you want to create documentation.
- You have selected or opened the relevant project.

- You know whether you want to create a new document or work with an existing one.
- You have the document title and basic content ready, if your organization requires these details when creating documentation.

Step-by-Step Instructions

1. Open the project dashboard for the project where you want to author documentation.
2. Locate the **Quick Actions** area on the dashboard.
3. Select **Quick Create** to start a new document.
4. Enter the requested document details on the new-document screen.
5. Select **Create Document** to create the document.
6. Add or revise the document content in the document editing workspace.
7. Select **Documents** when you want to return to the project's document collection.



Screenshot pending: New-document screen reached from Quick Create, showing the Create Document action.

Tips and Best Practices

- Use **Quick Create** when you already know that you need a new document. It reduces the number of navigation steps compared with opening the document collection first.
- Use a clear, specific document title when you create the document. A descriptive title makes the document easier to locate later through **Search documents....**
- If you are not ready to create a document from scratch, look for **Or import existing documentation** on the new-document screen. This option is useful when content already exists outside Atloria.
- Use **Documents** rather than Quick Actions when you need to manage existing content. The document area includes actions such as **Delete Documents** and **Export Documentation**.
- Use the document search field when your project contains many documents. Depending on where you are working, you may see **Search documents...** or

Search documents, categories, projects....

- Confirm that you are working in the intended project before using **Quick Create**. The documents you create should be associated with the project you have opened.
- If you need to leave the new-document screen without creating a document, use ← **Back to Documents** to return to the document list.

Related Pages

- [Create a New Document](#)
- [Manage Documents](#)
- [Search Documents](#)
- [Import Existing Documentation](#)
- [Export Documentation](#)
- [Delete Documents](#)

Troubleshooting

You cannot find Quick Actions

1. Open the relevant project dashboard.
2. Look for the dashboard area that contains **Quick Actions**.
3. Select **Documents** if you need to create or manage documents and the Quick Actions area is not available on your current screen.

You do not see documents after selecting Documents

1. Check whether a project has been selected.
2. Select the project you want to work in.
3. Review the message **Select a project to view documents** if it appears.

You created the wrong document or need to change it

1. Open **Documents**.
2. Locate the document by using **Search documents....**

3. Open the document to edit its content, or use **Delete Documents** if you need to remove it.