

Apply a Documentation Template

September 10, 2026

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Documentation templates help you create content that follows a consistent structure and presentation. Use a template when you want new documentation to match the standards used across your Atloria project.

Overview

Templates provide a repeatable starting point for documentation. Instead of building every document from a blank page, you can use a template to guide the organization and formatting of your content.

You may need a template when creating user guides, publishing documentation, or preparing content for export. Templates are especially useful when multiple people create documentation, because they help keep headings, sections, and document layouts consistent.

In Atloria, template-related options are available as part of the documentation and publishing workflow. You can create a new document, open the editor, and use the available template settings to align your document with the appropriate format.

 *Screenshot pending: The documentation creation workflow showing the Create New Document and Create & Open Editor actions.*

Prerequisites

Before you begin, make sure you have:

- Access to the project where you want to create or update documentation.
- Permission to create or edit documentation content.
- A clear understanding of the document type you need to create, such as a user guide or publishing-related document.

- The template or documentation standard your organization expects you to use.
- Any required source material, such as existing documentation that you want to update or import.

Step-by-Step Instructions

1. Open the documentation area for your project.
2. Select **User Docs** if you are working with project documentation intended for end users.
3. Select **Create New Document** to start a new documentation item.
4. Select **Create & Open Editor** to create the document and open it for editing.
5. Review the available document structure before adding your content.
6. Select **5. Templates** when it is available in your documentation workflow.
7. Choose the template that matches the type of documentation you are creating.
8. Confirm that the template includes the sections your document requires.
9. Enter a clear title for the document.
10. Add content to each template section in the order presented.
11. Use the editor toolbar to apply consistent formatting to headings, text, lists, and links.
12. Select the link tool when you need to add a reference to another document or resource.
13. Review your document for empty template sections before continuing.
14. Select **Publishing** when the document is ready for the publishing workflow.
15. Select **Export Documentation** if you need to create an exported copy of the completed documentation.



Screenshot pending: The template selection area showing the available documentation templates.

Tips and Best Practices

- Start with a template before writing content whenever consistency is important. Applying a template at the beginning reduces reformatting later.
- Use the template sections as a checklist. If a section does not apply, confirm whether your organization expects it to remain in the document before removing it.
- Keep the title specific. A title such as “Create Payment” or “How to create a maintenance request” helps readers understand the purpose of the document before opening it.
- Use the editor’s formatting controls instead of manually recreating formatting with repeated spaces or symbols. This helps preserve a consistent presentation.
- Add links using the editor’s link control when referring readers to related documentation. Links are easier to maintain and use than copied web addresses in body text.
- Review template settings before publishing. The **3. Template Settings** step may be available as part of your documentation workflow and can help you verify that the selected structure is appropriate.
- If you already have content outside Atloria, consider **Or import existing documentation** rather than copying content manually. Review imported content carefully to ensure it follows the selected template.
- Use **Create Manually** only when you intentionally need a document structure that is not provided by an available template.

Related Pages

- [Create a New Document](#)
- [Use the Documentation Editor](#)
- [Configure Template Settings](#)
- [Publish Documentation](#)
- [Export Documentation](#)
- [Import Existing Documentation](#)
- [Create User Guides](#)

Troubleshooting

You cannot find the template options

Open the document creation workflow and look for **5. Templates** or **3. Template Settings**. If neither option is available, your project may use a predefined document structure or your access may not include template configuration.

The template does not match the document you need to create

Return to the template selection step before adding significant content. Select a template that better matches the document's purpose, such as a user guide or publishing document. If no available template is suitable, use **Create Manually** only if your organization permits a custom structure.

Your document does not look consistent after applying a template

Review each heading, list, and link in the editor. Apply formatting through the available toolbar controls, and check that required template sections have not been removed or renamed unintentionally.