

Administer documents

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Document administration is the work of maintaining document records, their categories, their list order, and the way you reach each record in a project. A document record is an item in the project's documentation list, and a category groups records so your team can find them. Use administration when you need to organize existing documentation or maintain those categories. The Documents workspace is the project area where these records are listed and organized.

If you need to...	Go to
Find an existing document record	Find a document record
Understand the list, categories, views, and dialogs	Understand the Documents screen
Filter, reorder, or change categories	Organize document records and categories
Create or edit document content	Create and edit a document
Review document states and actions	Document changes
Manage document access	Document access reference
Recover from an administrative problem	Document administration troubleshooting

Before you start

Before you administer documents, select the project you want to manage and sign in. Document loading requires both a project and a signed-in session. The category area appears only after a project is selected. Have the saved document or category you need to manage in

mind before you begin.

Have this ready	Why it matters
The project that contains the documents	The Documents list and category area use the selected project.
A saved document record or category to manage	The available list, category, and record actions depend on the returned project data.
A signed-in session	Document and category loading waits for an authenticated session.

The current project, version, category, document values, and permissions depend on the account and project you are using. With the project selected and the record or category in mind, continue to [Find a document record](#).

Find a document record

Find an existing document record when you need to open it rather than create or edit its content.

Prerequisites

- You have selected a project.
- You know enough of the document title or category to narrow the list.

Steps

1. Open the Documents destination for the selected project.
2. To search by text, enter a value in **Search documents**.
3. To narrow the document type, select one of **All**, **Manual**, or **Generated**.
4. To narrow the document status, select one of **All**, **Draft**, **Published**, or **Archived**.
5. To narrow the category, select **All Documents** or a category in the category area.
6. Select the document record you need from the filtered list.

Result: The selected document record is open for the next document task.

Understand the Documents screen

The Documents screen combines a document list with category navigation. The list can use cards or rows, and category administration opens in dialogs.

The main areas are:

Area	What it contains
Document list	Search, type and status filters, sorting, view selection, document cards or rows, and pagination.
Category area	Categories , category search, All Documents , project categories, and Add Category .
Version selector	Version , when the selected project has one or more versions.
Order controls	Edit order and drag-and-drop ordering when a project is selected.
Category dialogs	Create Category , Edit Category , and Delete Category dialogs.

In list view, the row headers are Document, **Type**, **Status**, **Category**, and **Updated**. In card view, documents appear as cards instead of rows.

When you create or edit a category, the dialog contains **Name**, **Slug**, **Description**, **Icon**, and **Color**. **Name** and **Slug** are required. **Description** is optional. In create mode, entering a name generates a lowercase slug with spaces replaced by hyphens and other characters removed.

Organize document records and categories

Organizing documents means narrowing the list, choosing how it is displayed, changing its order, and maintaining categories.

Filter and change the list

Prerequisites

- You have selected a project.
- The Documents list is open.

Steps

1. Enter text in **Search documents** when you need a text match.

2. When search text is present, select **Clear search** to remove it.
3. Select a document type from **All**, **Manual**, or **Generated**.
4. Select a document status from **All**, **Draft**, **Published**, or **Archived**.
5. When the version selector is available, select a value in **Version**.
6. In the Documents list, select the sorting control beside the view-selection control.
7. Select a display mode in the view toggle.
8. Select **Clear** in the category filter indicator to remove the selected category.
9. Use **Previous page**, a page number, or **Next page** to move through the list.

Result: The Documents list shows the records using the selected filters, sort, view, and category selection.

Reorder documents or categories

Prerequisites

- You have selected a project.
- The documents or categories you want to reorder are visible.

Steps

1. Select **Edit order**.
2. Use drag and drop to reorder documents within a category, or to reorder categories and documents when no category is selected.
3. Select **Exit edit mode** when the order is correct.

Result: The Documents screen returns to its normal list view with edit-order mode closed.

Create or edit a category

Prerequisites

- You have selected a project.
- The category area is visible.

Steps

1. Select **Add Category** to open **Create Category**.
2. Enter the category name in **Name**.

3. Review the generated value in **Slug**.
4. Enter a value in **Description**, if needed.
5. Select an option in **Icon**.
6. Select an option in **Color**.
7. Choose the category action in this table:

Goal	Action
Create a category	Select Create .
Edit a category	Select its Edit category control, update the fields, and select Save .

8. Select **Cancel** to close either dialog without saving.

Result: The category dialog closes after the create or edit action, and the category area can be refreshed with the updated category.

Delete a category or document

Prerequisites

- You have selected the category or document to remove.
- You have checked that the removal is intended.

Steps

1. Choose the removal path in this table:

Goal	Action
Delete a category	Select the category's Delete category control.
Delete a document	Select the document's Delete Document control.

2. Read the confirmation in the path you selected:

Goal	Action
Delete a category	Read <code>All documents in this category will be moved to "Uncategorized". Subcategories will also be deleted.</code>
Delete a document	Read the document confirmation dialog.

3. Choose the confirmation action in this table:

Goal	Action
Keep the category	Select Cancel .
Confirm the category deletion	Select Delete .
Confirm the document deletion	Follow the document confirmation dialog and select its Delete Document control.

Result: The selected delete operation is either cancelled or confirmed from its dialog.

Handle different document-list states

The Documents screen changes its available areas according to the selected project, category, version, filters, and edit-order mode.

If you need to...	Use this path
View documents for a project	Select a project first; the category area then becomes available.
View all project documents	Select All Documents .
Work within one category	Select that category; the list receives the category filter.
Work with a non-active version	Read the version notice, then switch to the active version in Version .
See why no records are listed	Check whether a search, type, or status filter is active; the empty state changes when a search is present.
Change ordering	Select Edit order ; the list changes to the sortable ordering surface.

Prerequisites

- You are on the Documents screen.

Steps

1. Select the path that matches your goal in the table above.

Result: The Documents screen shows the list or ordering state that matches your selection.

If no project is selected, the category area displays `No project selected` and `Select a project to view categories`. The page also prompts with

“Select a project to view documents”.

When document administration goes wrong

Use the exact message on screen to choose the applicable response. Do not repeat a destructive

action when the message identifies a failed request.

What you see	Meaning and next action
Loading...	The category area is loading. Wait for the category list to appear.
Loading document...	The document record is loading. Wait for the record result.
Document failed to load.	The record did not load. Use Document administration troubleshooting .
No categories yet.	The project has no categories in the category area. Use Add Category if you need one.
No matches.	The category search has no matching category. Change the category search value.
Failed to save category	The category save request failed. Review the category values and try the save again.
Failed to delete category	The category deletion request failed. Check that the category remains selected before trying again.
Failed to delete document:	The document deletion request failed. Check that the record remains in the list before trying again.
Failed to reorder documents. Please try again.	The document reorder request failed. Check the displayed order before trying again.
Failed to reorder categories. Please try again.	The category reorder request failed. Check the displayed category order before trying again.
All documents in this category will be moved to "Uncategorized". Subcategories will also be deleted.	This is the category deletion warning. Select Cancel to keep the category, or Delete to confirm the operation.

The `Unauthorized` reload handling belongs to the document detail loading flow. Viewer-rendered

chapter, command-palette, viewport, annotation, and screenshot messages belong to

the document viewer rather than document administration.

What to do next

After you finish an administrative change, continue with the task that matches what you need to do next:

Next need	Page
Create a document or edit its content	Create and edit a document
Review document states and actions	Document changes
Manage document access	Document access reference
Resolve an administrative issue	Document administration troubleshooting

The document record remains the hand-off point for content work and document-specific actions.