

Create and edit a document

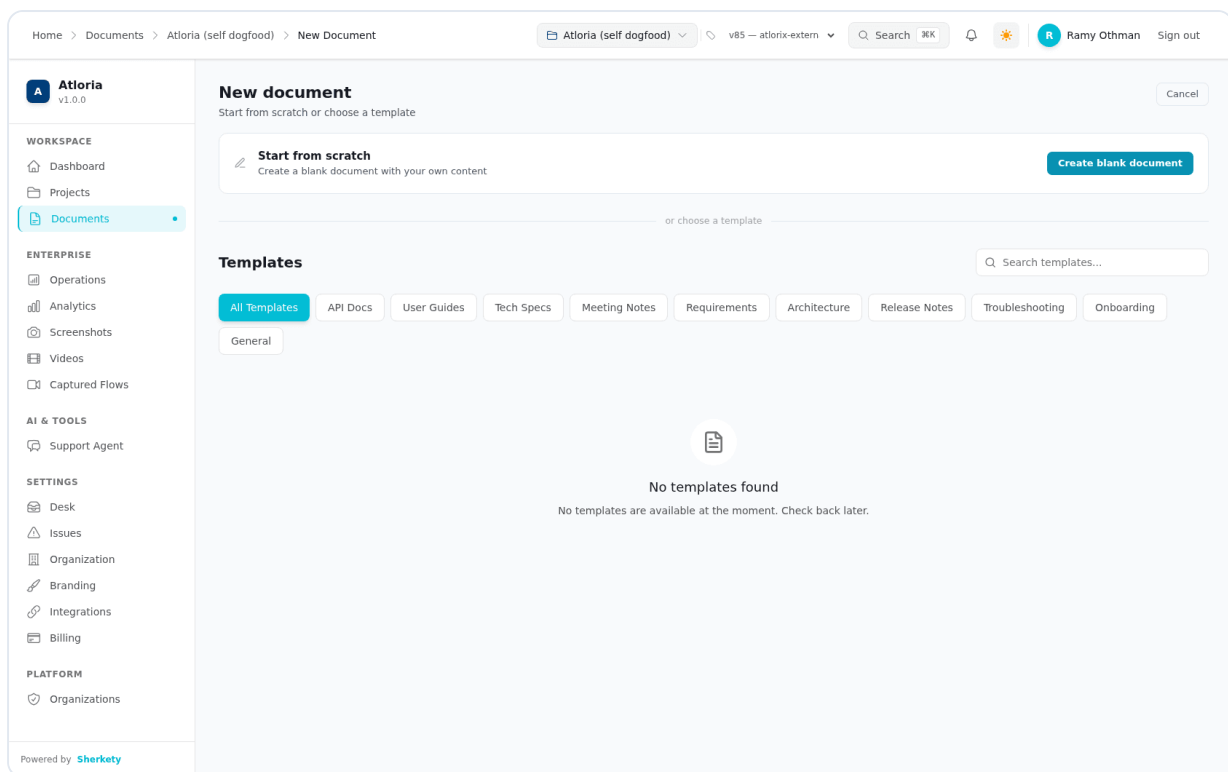
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Create and edit a document

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A document is a documentation record that lives inside a project. Create one when you need a new piece of documentation, then open its editor to change the content or its settings. Changes to the title, content, document type, slug, category, or audiences are saved to the record automatically.

If you need to...	Go to
Check what you need before creating a document	Before you start
Reach the document workspace	Find the document area
Create a blank document or use a template	Create the document
Change document content or settings	Edit content and save the record
Choose a different creation or editing route	Handle the available branches
Fix a validation or saving problem	When creation or saving goes wrong
Continue with revisions, translation, or publishing	What to do next
Understand how documents are organised	Documents overview
Review document changes	Document changes
Compare revisions	Compare document revisions
Translate a document	Translate a document
Read published documentation	Published documentation



Before you start

Prerequisites

Have a project available for the document. The project supplies the context in which its categories and documentation are organised.

Collect the following information before you begin:

Information	What to prepare
Project	The project in which the document belongs
Category	An optional category, or the root level when no category is needed
Title	The name readers will use for the document
Slug	A lowercase, hyphenated URL-friendly identifier
Document Type	One of <code>Manual</code> , <code>Generated</code> , <code>Hybrid</code> , <code>Wiki</code> , <code>API Guide</code> , <code>User Manual</code> , or <code>SOP</code>
Audiences	At least one of <code>TECHNICAL</code> , <code>USER</code> , <code>API</code> , or <code>INTERNAL</code>
Content	The documentation text to place in the document

You must be signed in to create a document. The **Project** list uses the available projects.

The **Category** list becomes available after you select a project; it includes `No category (root level)` for a document at the root level. The **Audiences** choices must contain at least one selection when you create the record.

Find the document area

The Documents area is where you manage and organise documentation. Use it when you are starting a new record or looking for a saved document to edit.

Prerequisites

You have a signed-in session and know whether you are creating a new document or changing a saved one.

Steps

1. Open **Documents**.
2. Select **New Document** to start a record.
3. Select an existing document when you need to edit its saved content.

Result: You are at the new-document selection surface or at the editor for the saved document you selected.

Create the document

Use the creation form to enter a title, URL identifier, type, audience, and documentation content.

Choose a blank form when you want to enter the record yourself, or start from a template when prepared content is a suitable starting point.

Prerequisites

You have a project available and the document information listed in [Before you start](#).

Steps

1. Choose the route that matches how you want to begin.

If you want to...	Select
Enter a blank document	Create blank document
Start with prepared content	A template in All Templates

2. In **Project**, select the project for the document.
3. In **Category**, select a category, or select `No category (root level)`.
4. In **Title**, enter the document name.
5. In **Slug**, enter a lowercase, hyphenated identifier.
6. In **Document Type**, select `Manual`, `Generated`, `Hybrid`, `Wiki`, `API Guide`, `User Manual`, or `SOP`.
7. In **Audiences**, select at least one of `TECHNICAL`, `USER`, `API`, or `INTERNAL`.
8. In **Content**, enter the documentation text.
9. Select **Create document**.

If you leave **Title**, **Slug**, or **Project** empty, the page displays

`Title, slug, and project are required.`

If you clear every audience, the page displays `At least one audience is required.`

If the session has no user, the page displays `No user found. Please log in again.`

Result: The record is created and the page routes to its edit page. While the record is being

created, the button reads `Creating...`. If creation fails, the page displays `Failed to create document`.

Edit content and save the record

The edit page is the workspace for changing a document's content and metadata. Its main editor

holds the document text, while the settings area holds the document type, slug, category, and audience choices.

Prerequisites

You have opened a saved document in its edit page.

Steps

1. Select **Untitled Document** at the top of the editor and enter the new document title.
2. In **Content**, change the documentation text.
3. Select **Settings**, then change **Document type**, **Slug**, or **Category** as needed.
4. In **Target audiences**, select or clear the audiences that should receive the document.
5. Read the save status as `Unsaved` , wait for `Saving...` , and wait for `✓ Saved` .
6. Select **Done** when you have finished editing.

The content editor provides controls for headings, lists, quotes, tables, links, images, code blocks, front matter, directives, and other editor functions. In the editor, the content area uses the placeholder `Start writing your document...` when it is empty.

Result: The edited record shows `✓ Saved` . Keep the editor open for the available branches, or select **Done** to return to the Documents area. If an update fails, the page displays `Failed to save document` and the status returns to `Unsaved` .

Handle the available branches

The creation and editing routes change what you see according to the project, document, and editing state. Collaborative mode handles content separately from the page's metadata save. Use the branch that matches the state shown on your page.

Prerequisites

You are at the new-document selection page or have opened a saved document in the editor.

Steps

1. Choose the branch that matches what you need to do.

If you need to...	Action	What you see next
Start from prepared content	Select a template in All Templates .	The form is prefilled with the template's title, slug, content, type, and audiences.

If you need to...	Action	What you see next
Wait for projects	Wait for Loading projects... to finish.	Select Project when the list is ready.
Create the first project	Select Create project and create a project.	You can create the document inside the project.
Select the project	Select Project .	The category list begins loading.
Wait for categories	Wait for Loading categories... to finish.	Select Category when the list is ready.
Use the root level	In Category , select No category (root level) when the page shows No categories available .	The document remains at the root level.
Edit collaboratively	Select Collaborate .	Continue editing in collaborative mode.
Preview for an audience	Select Preview mode , then choose audiences in View as: .	The document is shown for the selected audiences.
Copy or open a published address	Use Public URL to copy or open the address.	The page displays URL copied to clipboard! after copying.
Send a published public edit for review	Select Propose change →.	The page displays You are editing a published page. Saving creates a change request for review – the live page keeps serving until it is merged.

Result: You are using the creation or editing route that matches the project and document state, with the applicable fields and actions visible.

When creation or saving goes wrong

Use the message on screen to choose the corrective action.

What you see	What it means	What to do
Loading projects...	The project list is still loading.	Wait for the list to finish loading.
No project yet.	No project is available for the document.	Select Create project and create a project first.
Select a project first to see categories	A project has not been selected.	Select a project in Project .

What you see	What it means	What to do
Loading categories...	Categories for the selected project are loading.	Wait for the category list to finish loading.
No categories available	The selected project has no categories.	Leave Category at No category (root level) .
No user found. Please log in again.	The signed-in user is unavailable to the creation request.	Sign in again, then retry creation.
Title, slug, and project are required.	One or more required creation values are empty.	Complete Title , Slug , and Project .
At least one audience is required.	No audience is selected.	Select at least one audience in Audiences .
Failed to create document	The creation request failed.	Check the values and retry Create document .
Loading document...	The saved document is still loading.	Wait for the editor to load.
Failed to load document	The document request failed while loading.	Return to Documents and open the document again.
Document failed to load.	The editor could not load the document.	Select Back to documents , then open the document again.
Saving...	An update is being sent.	Wait for the status to change.
Unsaved	The latest change has not finished saving.	Wait for ✓ Saved before leaving the editor.
Failed to save document	The update request failed.	Retry the edit and wait for ✓ Saved .

What to do next

After the record is saved, continue according to the outcome you need:

If you need to...	Continue with
Review the record's states and available actions	Document changes
Compare versions or revisions	Compare document revisions
Translate the document	Translate a document
Read the public version	Published documentation

Result: You have a saved document record and a clear next document task.