

Document administration troubleshooting

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Use this page to find a document or category, recover an unexpected list state, and maintain categories or document order in the Documents area.

Document administration troubleshooting

Document administration is the work of finding and organizing documentation records, then recovering the list when filters, versions, categories, or access conditions change what you see. Use the Documents area to manage and organize documentation. A category is a group of documents in the selected project. Document order is the arrangement of records in the ordering surface.

If you need to...	Go to
Find a document or category	Find the document or category involved
Recover an empty, filtered, or unavailable list	Recover from an unexpected list state
Create, edit, delete, or reorder categories	Maintain categories and document order
Manage the document record itself	Administer documents
Edit document content	Create and edit a document
Review document access	Document access reference
Match a message to broader help	General error messages
Find cross-surface recovery guidance	Common issues and solutions

Before you start

Prerequisites

Have this ready	Why it matters
A selected project	Documents and categories load only when a project is available.
An authenticated session	Document and category data loads after authentication is available.
The document title, category name, or list condition you are investigating	These details help you choose the right search, filter, or recovery path.

If no project is selected, the category area displays `No project selected` and `Select a project to view categories`. The Documents area displays `Select a project to view documents`.

If the session is unauthenticated, the category area displays `Authentication required`.

Find the document or category involved

A document list is the working list of documentation records; use its search, filters, category selection, sort order, and view choice to narrow the list before changing anything.

Prerequisites

- Have a selected project and an authenticated session.

Steps

1. Open the Documents area.
2. Enter search text in **Search documents....**
3. Select **Clear search** when it appears and you want to remove the search text.
4. Choose the list options that match what you need to find.

If you need to...	Select or enter
Include every document type	All in the type filters
Find manually maintained documents	Manual
Find generated documents	Generated
Include every document status	All in the status filters
Find draft work	Draft
Find published documentation	Published

If you need to...	Select or enter
Find archived documentation	Archived
Include every category	All Documents
Find one category	Enter its name in Category search in Categories
Switch between available document versions	Version
Scan document cards	Card view with the View toggle
Read column headers	List view with the View toggle
Return to the previous results page	Previous page
Open a specific results page	The page number
Move to the next results page	Next page

5. Use the **Sort control** to change the order of the list.
6. In list view, read the headers **Document**, **Type**, **Status**, **Category**, and **Updated** to identify the record and its current list information.

Result: The list is narrowed to the document or category you need to inspect, and list view shows the document, type, status, category, and updated columns.

Recover from an unexpected list state

The list can change because a search, filter, category, project, or version changes the records being shown. Check the visible condition before treating an empty or changed list as lost documentation.

Prerequisites

- Have the affected project or category in mind.

Steps

1. Check the active filters and document count above the list.
2. If the list is empty after a search, remove the search text with **Clear search**.
3. If the list is still empty, select **All** in the type filters.
4. Select **All** in the status filters.

5. If the category list is empty, read the message `No categories yet.` .
6. If a category search returns nothing, read the message `No matches.` .
7. If no project is selected, return to the project selector before using the category area.
8. If a non-active version is selected, use the **Version** selector to switch to the active version.
9. If the page is in order-editing mode, select **Exit edit mode** to return to the document list.
10. If **New Document** is not available, continue with the list and category controls that are present on the page.

What you see	What it means	Next action
<code>No project selected</code>	A project is not available to the page.	Return to the project selector before using categories or document data.
<code>No categories yet.</code>	The selected project has no categories in the category area.	Work from All Documents or create a category if Add Category is available.
<code>No matches.</code>	The category search does not match a category.	Clear the category search or use All Documents .
A <code>Draft</code> , <code>Deprecated</code> , or <code>Archived</code> version notice	The selected version is not active.	Switch to the active version above the notice.
Exit edit mode	The page is showing the sortable ordering surface.	Return to the normal document list.

Result: You have either restored the intended list context or identified the project, category, version, or edit-order condition that explains the list.

Maintain categories and document order

Use the ordering surface to arrange the selected project's records.

Prerequisites

- Have a selected project.
- Confirm that the list itself is showing the intended project and category context.

Create a category

Steps

1. Select **Add Category** to open the category form.
2. Enter the category name in **Name ***.
3. Review **Slug *** after entering the name.
4. Enter an optional value in **Description**.
5. Select an option under **Icon**.
6. Select an option under **Color**.
7. Select **Create** to create the category.

The create form generates **Slug** from **Name** by converting the name to lowercase, replacing spaces with hyphens, and removing characters other than letters, numbers, and hyphens.

Result: The category form closes after the category is created.

Cancel a category change

Steps

1. In the category form, select **Cancel**.

Result: The category form closes without saving the change.

Edit a category

Steps

1. Select **Edit category** on the category row.
2. Enter the category name in **Name ***.
3. Review the value in **Slug ***.
4. Enter the category description in **Description**.
5. Select an option under **Icon**.
6. Select an option under **Color**.
7. Select **Save** to save the category changes.

Result: The category form closes after the category is updated.

Reorder categories or documents

Steps

1. Select **Edit order**.
2. In the category area, use **Drag to reorder** to move a category.
3. In the ordering surface, drag a document to its required position.
4. Select **Exit edit mode** when the ordering is complete.

Result: The page returns to the normal document list with the revised ordering request completed.

Review category deletion

Warning: Deleting a category moves all documents in it to **Uncategorized** and also deletes its subcategories.

Steps

1. Select **Delete category** on the category row.
2. Read the confirmation message: **All documents in this category will be moved to "Uncategorized". Subcategories will also be deleted.**
3. Select **Cancel** to keep the category and its organization.
4. Select **Delete** only when moving the documents and deleting the subcategories is intended.

Result: **Cancel** closes the dialog without confirming the deletion; **Delete** confirms the category deletion.

When recovery does not work

Use the exact message on screen to choose the next safe diagnostic action. Do not repeat a destructive operation when the message does not change.

Message	What it means	Next action
Authentication required	The category area cannot load for the current session.	Use an authenticated session before reopening the Documents area.
Loading...	The category area is loading.	Wait for the category list to finish loading.
Failed to delete category	The category deletion request failed.	Keep the category context and use Common issues and

Message	What it means	Next action
		solutions for the next diagnostic path.
Delete Document	The document delete dialog's confirmation control.	Match a failed request to the document deletion message below.
Failed to delete document:	The document deletion request failed. Text after the colon gives the returned reason; when no reason is returned, the message ends with <code>Unknown error</code> .	Do not repeat the deletion until the returned reason is understood.
Failed to reorder documents. Please try again.	The document ordering request failed.	Leave the list in its current order and retry only after checking the ordering context.
Failed to reorder categories. Please try again.	The category ordering request failed.	Leave the category order unchanged and retry only after checking the project context.
Failed to save category	The category save failed without a more specific message.	Keep the form values and use General error messages for broader diagnosis.

The **Delete Document** control belongs to the document delete dialog. A failure from that control uses the document deletion message in the table above.

The category edit and delete controls appear on category-row hover. The category drag handle appears in edit-order mode. The Documents list shows **New Document** only when that action is available to the list. These conditions explain why a control can be absent without changing the document list.

Result: You have the exact failure message, have avoided repeating a destructive action, and have the appropriate broader help page for the next diagnostic step.

What to do next

Use the next page according to the work that remains:

If the next task is to...	Continue with
Manage the full document record	Administer documents
Edit document content	Create and edit a document
Review document changes	Document changes
Review access controls	Document access reference
Diagnose a general application message	General error messages
Resolve a cross-surface problem	Common issues and solutions