

Documents overview

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A document is a principal record that you create and edit inside a project. The **Documents** destination is the project workspace where you organize those records, narrow the list, and open a saved document for the next task.

If you need to...	Go to
Check the project and list conditions before working	Before you start
Locate a saved document by category, text, type, status, or order	Find documents
Understand the cards, list headings, views, and pages	Understand the document list
Open a document from the list	Open a saved document
Create or edit a document	Create and edit a document
Compare revisions	Compare document revisions
Translate a document	Translate a document
Review document states and actions	Document changes
Read published documentation	Published documentation

Before you start

Prerequisites

- Select a project before working with its categories and documents.

The Documents list and category sidebar depend on the selected project. Without one,

the page shows **No project selected** and **Select a project to view categories**.

With a project selected, the category sidebar loads the categories for that project.

If the project has versions, the page also provides **Version**. Its selected option comes from the current version context.

With a project selected, continue to [Find documents](#).

Find documents

A category is a group used to organize related documents. Use the category sidebar and the document-list controls to narrow the list until the document you need is visible.

Prerequisites

- Have a project selected.
- Know enough about the document to choose a category, search text, type, status, or sort order.

Steps

1. In the category sidebar, select **All Documents** to search across the project, or select a category to limit the list.
2. If you selected a category, select **Clear** in the category filter indicator to remove that category filter.
3. In **Search documents...**, enter text from the document you need.
4. Select one type filter: **All**, **Manual**, or **Generated**.
5. Select one status filter: **All**, **Draft**, **Published**, or **Archived**.
6. Open the sort menu and select the option that matches the way you want to locate the document.

If you need to...	Select
Keep the project's defined order	Custom Order
Start with the most recently changed documents	Recently Updated
Start with the least recently changed documents	Least Recently Updated
Start with the newest documents	Newest First
Start with the oldest documents	Oldest First

If you need to...	Select
Scan titles from A to Z	Title (A-Z)
Scan titles from Z to A	Title (Z-A)

Result: The list shows the documents matching the category, search text, type, and status choices, in the selected order.

Continue with the document-list presentation before opening a result.

Understand the document list

The document list is the working surface for choosing a saved record. It can show cards

or a list. The first list heading identifies the document, followed by **Type**, **Status**, **Category**, and **Updated**.

The page also provides **Card view** and **List view**, plus **Previous page** and **Next page** when the document list spans more than one page. **Edit order** changes the surface to an ordering mode for categories and documents; select it only when you need to change their order.

The fields **Version**, **Search documents...**, and **Search...** have no required marker. **Search...** belongs to the category sidebar and is shown when a project is selected and the category sidebar has loaded.

What you see	What it means
Search... in the category sidebar	Narrow the category list.
Search documents... above the document results	Narrow the document results by search text.
Cards	Each document is presented as a selectable card.
The first heading identifies the document; the following headings are Type , Status , Category , and Updated	Each visible row is organized by those document details.
Edit order mode	Categories and documents are presented for reordering.
An empty result	The empty-state behaviour depends on whether a search is active.

When the document you need is visible, continue with [Open a saved document](#).

Open a saved document

Opening a saved document takes you from the organized list to that document's record

view. Use this procedure when the document already exists.

Prerequisites

- Have a project selected.
- Locate the document card or list entry.

Steps

1. Select the document card or list entry.

Result: The document opens in its detail page. If the list shows an empty or error branch instead, continue with [Handle list branches](#).

If you need a new record instead, select **New Document** in the document list. The creation and editing procedure is described in [Create and edit a document](#).

Handle list branches

The list changes according to the project, category, search, and document results you have. Follow the alternative that matches what is on screen.

Select a project

Prerequisites

- The Documents destination is open.

Steps

1. If the page shows **No project selected** or **Select a project to view categories**, select a project before using the category sidebar or document list.

Result: The category sidebar and document list can load for the selected project.

Create the first category

Prerequisites

- A project is selected.

- The category sidebar shows `No categories yet.` .

Steps

1. Select **Add Category**.

Result: The category-creation path opens.

Recover from an empty category search

Prerequisites

- A project is selected.
- The category sidebar shows `No matches.` .

Steps

1. Change the text in **Search...** or clear the category search.

Result: The category list shows the categories matching the revised search.

Recover from an empty document result

Prerequisites

- The document list shows no result after a search.

Steps

1. Change the text in **Search documents...** or remove the active filters.

Result: The document list shows the results matching the revised search and filters.

Leave edit-order mode

Prerequisites

- Edit-order mode is active.

Steps

1. Use the ordering surface for category or document order.
2. Select **Edit order** to return to the normal document list.

Result: The normal document-list controls are on screen.

If an operation displays an error or warning, continue to [When the list does not load or an action fails](#).

When the list does not load or an action fails

Use the message on screen to identify which part of the Documents destination needs attention.

Recover when the category list does not load

Prerequisites

- A project is selected.

Steps

1. Follow the action for the message that appears.

Message	Action
Loading...	Wait for the category list to finish loading.
Authentication required	Sign in and return to the Documents destination.
Failed to load categories	Reload the category sidebar.
project-not-found	Select a project that exists in the current workspace.

Result: The category sidebar shows the categories for the selected project.

Recover after reordering fails

Prerequisites

- A reorder action has displayed an error.

Steps

1. Follow the action for the message that appears.

Message	Action
Failed to reorder documents. Please try again.	Leave the document order unchanged, then repeat the document reorder action.
Failed to reorder categories. Please try again.	Leave the category order unchanged, then repeat the category reorder action.

Result: The requested document or category order is submitted again.

Respond to the delete confirmation

Prerequisites

- The delete dialog is open for the document you intend to review.

Steps

1. Read `Are you sure you want to delete this document?` .
2. Read `⚠ This action cannot be undone. .`
3. Choose the action that matches your intention.

If you want to...	Select
Close the dialog without confirming the deletion	Cancel
Confirm the deletion after checking the document shown in the dialog	Delete Document

Result: The dialog closes without confirmation when you select **Cancel**, or the document deletion is confirmed when you select **Delete Document**.

Know what to do next

After you open a saved document, continue with the page that matches the work you need

to do:

If you need to...	Continue with...
Create a document or edit its content	Create and edit a document
Compare document revisions	Compare document revisions
Translate an existing document	Translate a document
Review document states and actions	Document changes
Read the published result	Published documentation

Opening a saved document takes you to its detail page. The detail page owns the controls and messages for that route. The creation, revision comparison, translation, changes, and published-documentation pages own their respective follow-on work.