



DocWeave

Getting Started - DocWeave

Version

v1.0

Screens

28

Total Steps

83

Created

Jun 27, 2026

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Getting Started - DocWeave

This guide explains how to build your first SOP step by step.

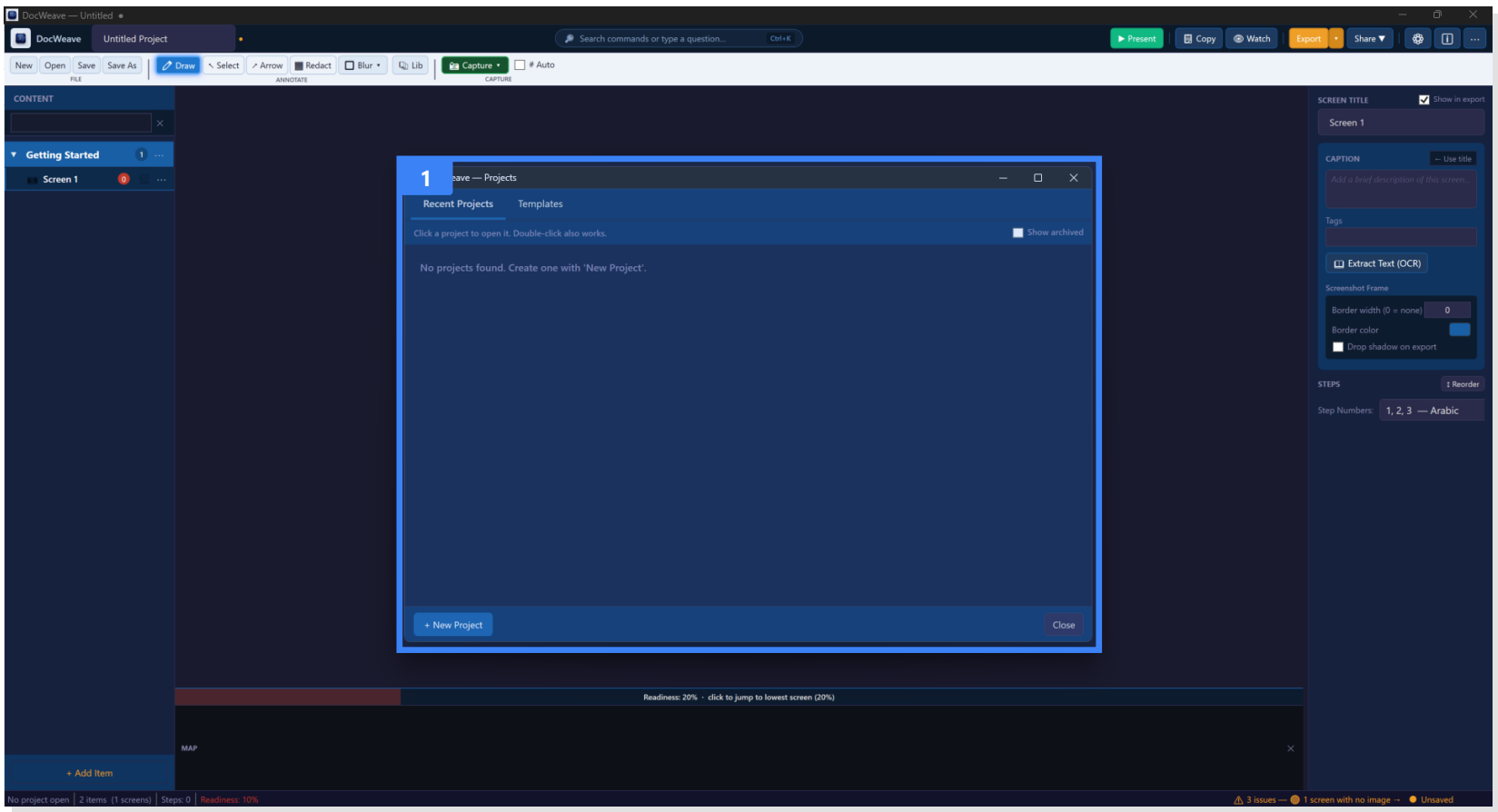




1

STEP 1
Project Window

The Project window opens with a list of recent projects. From here, you can select any previously created project and continue working on it.

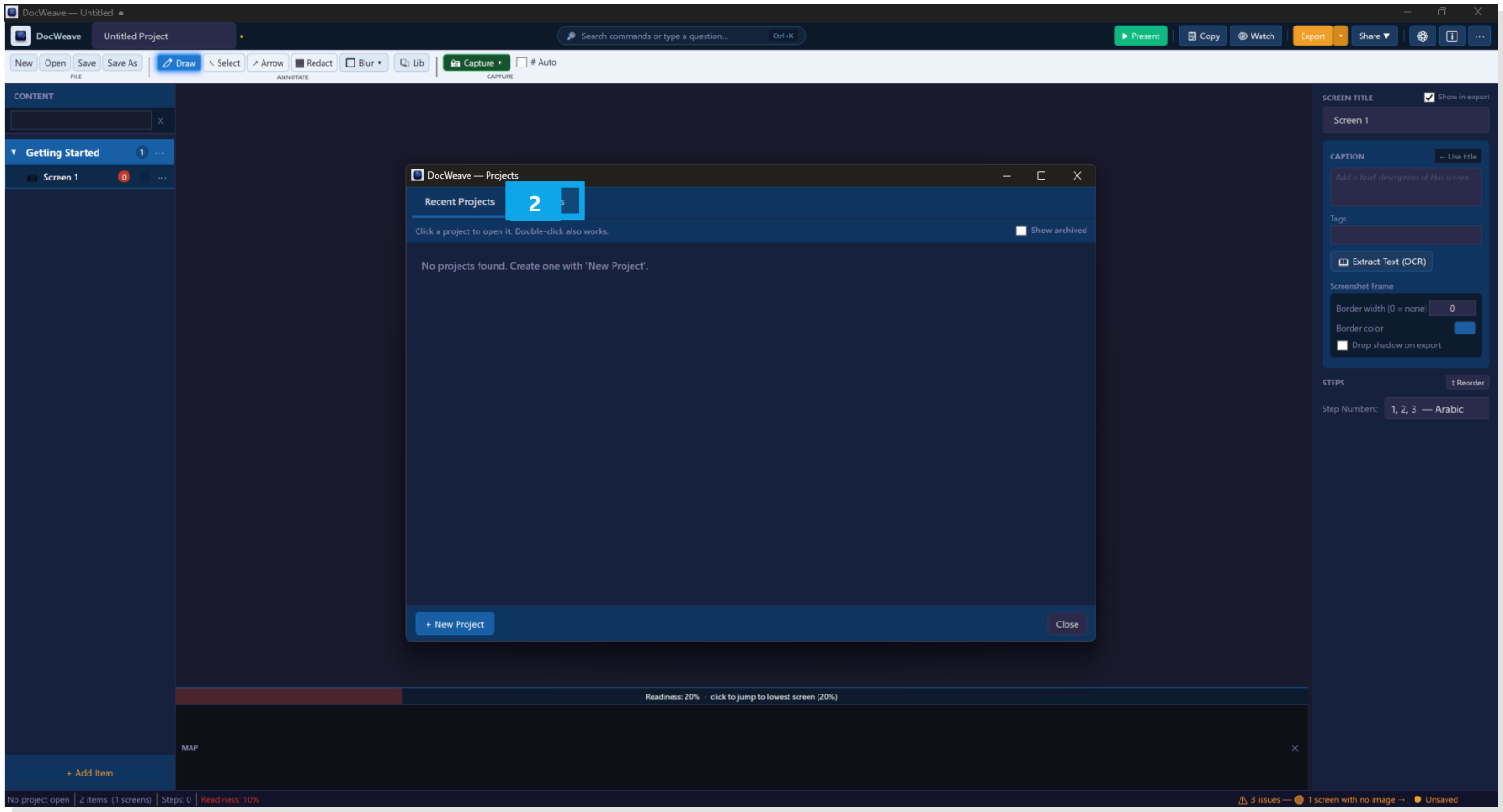




2

STEP 2
Templates

You can select from the prebuilt templates available in the system.

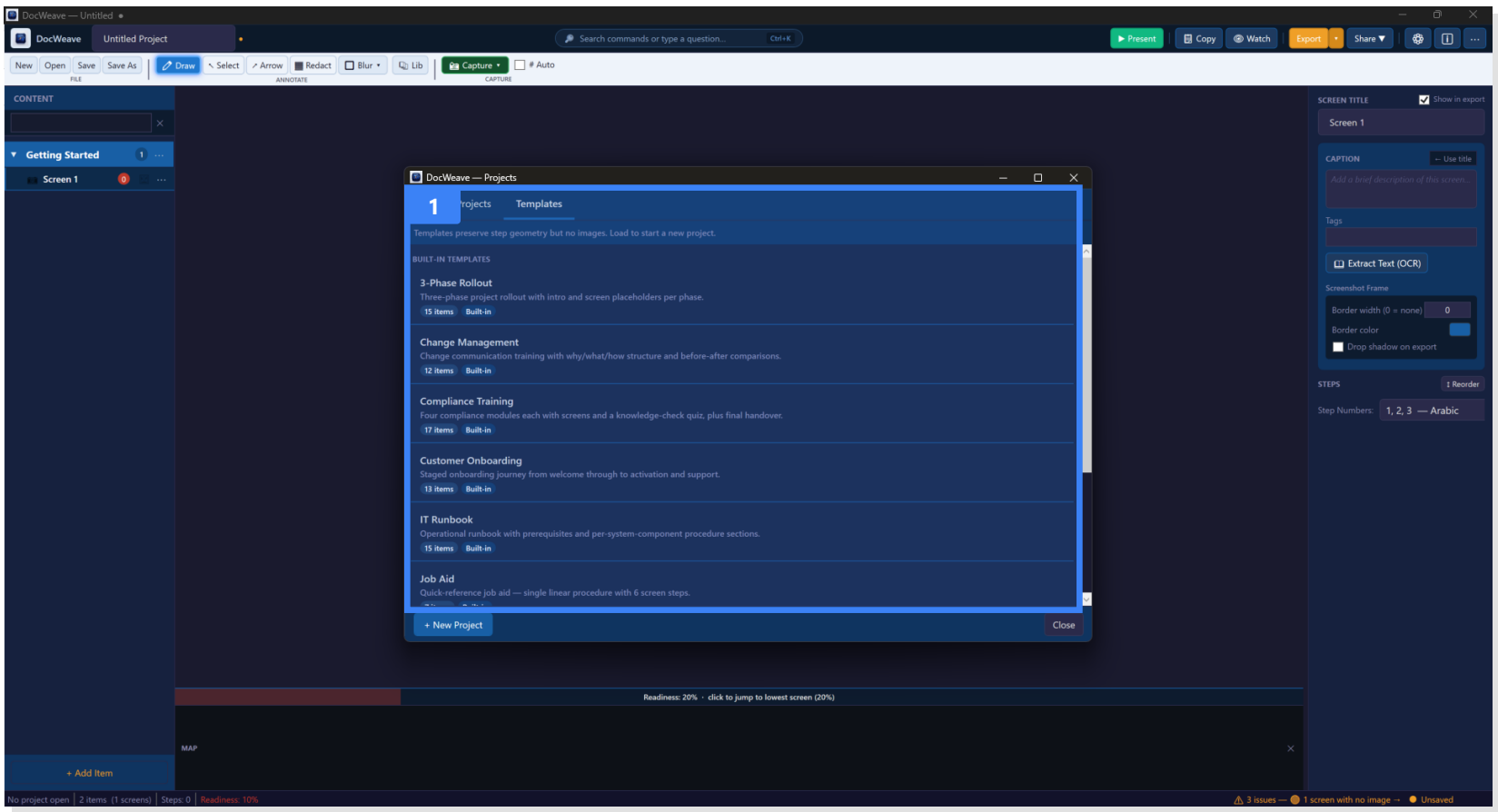




1

STEP 3
Templates

You can view the templates available in the system, select the required template, and create a project.

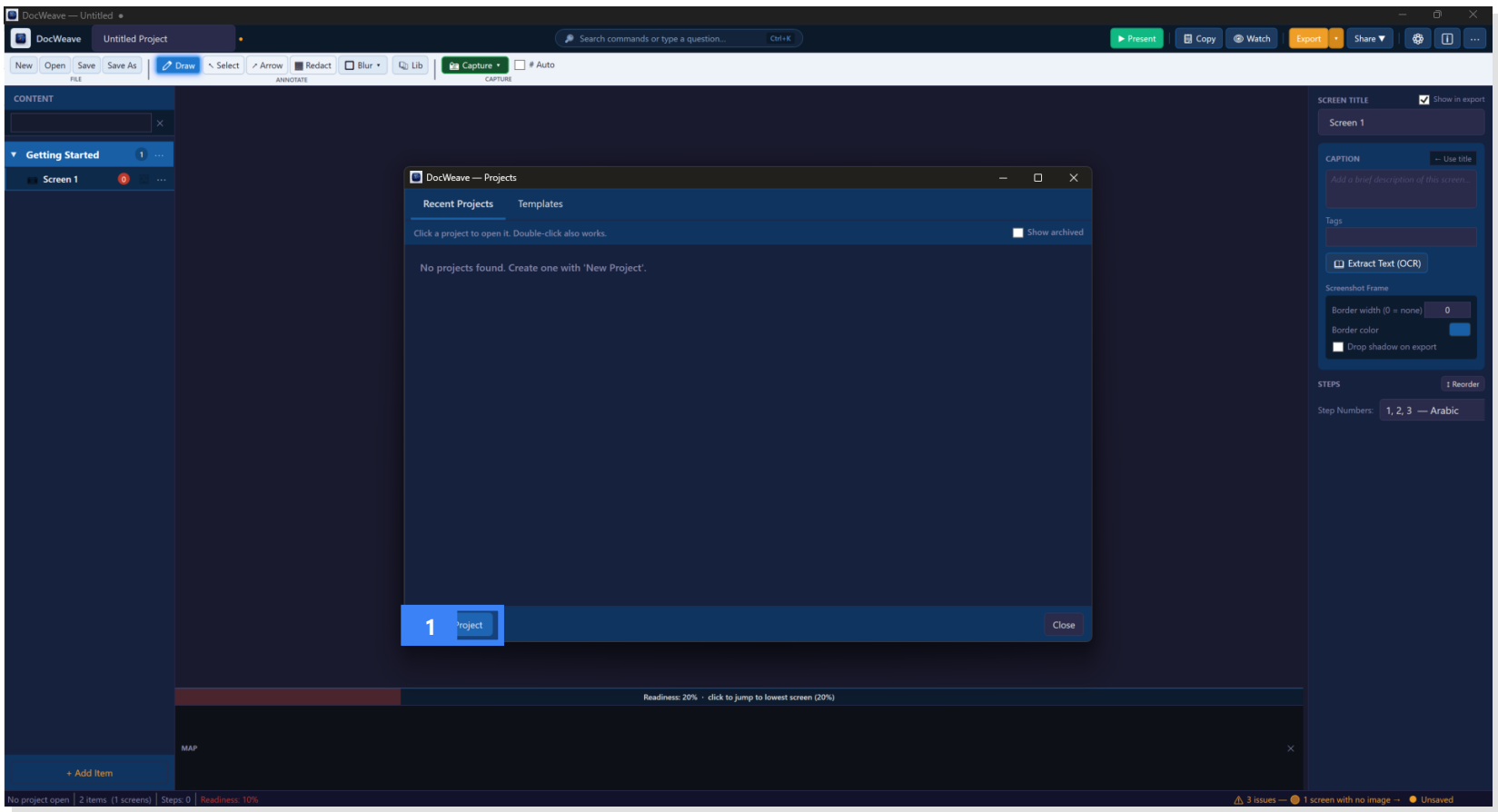




1

STEP 4
New Project

Click the **New Project** button to create a new project. In this example, we are creating a project from scratch without using a template.



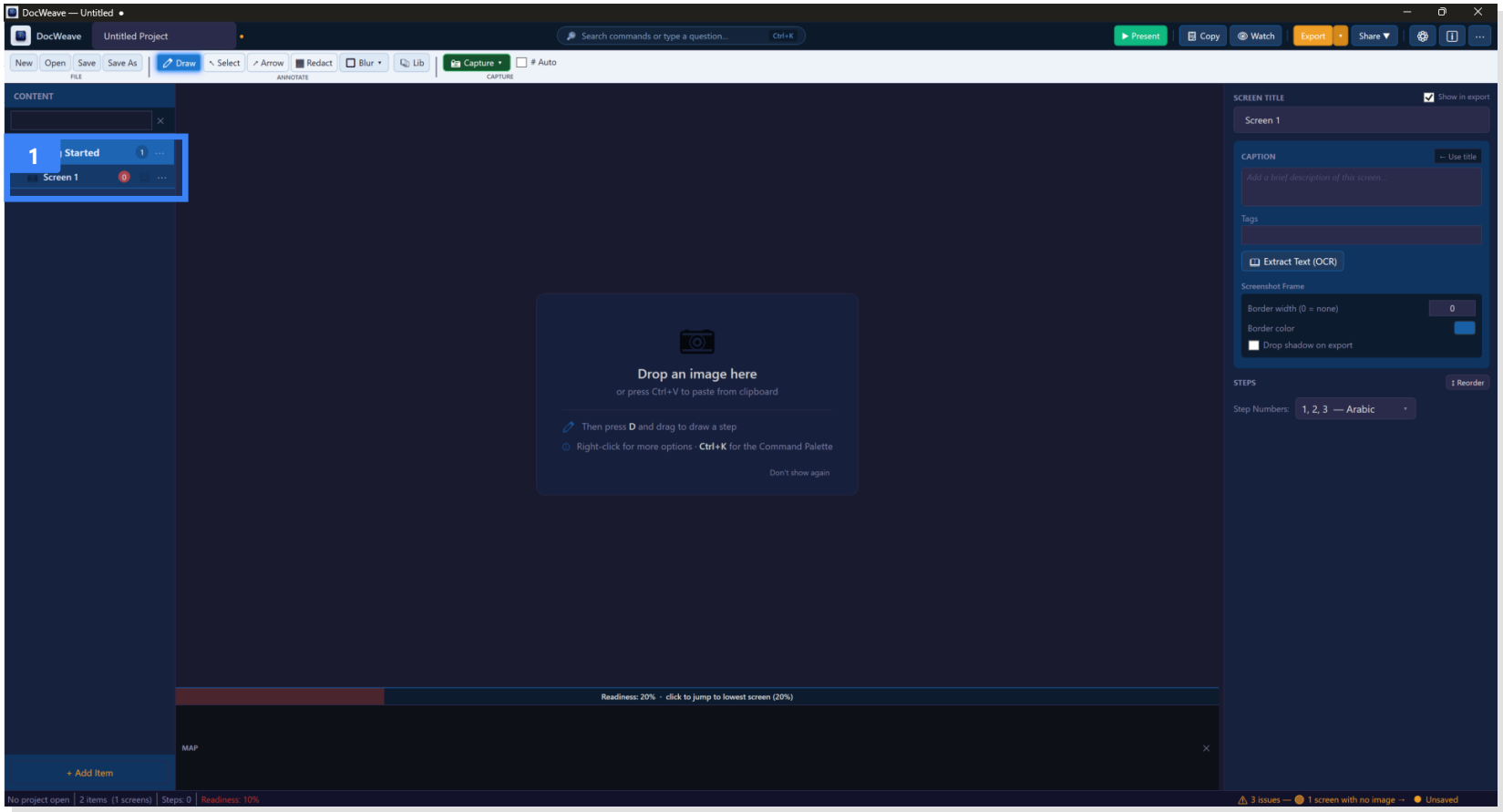


1

STEP 5

Items

A new base project opens with the first section created and a blank workspace ready for content entry.

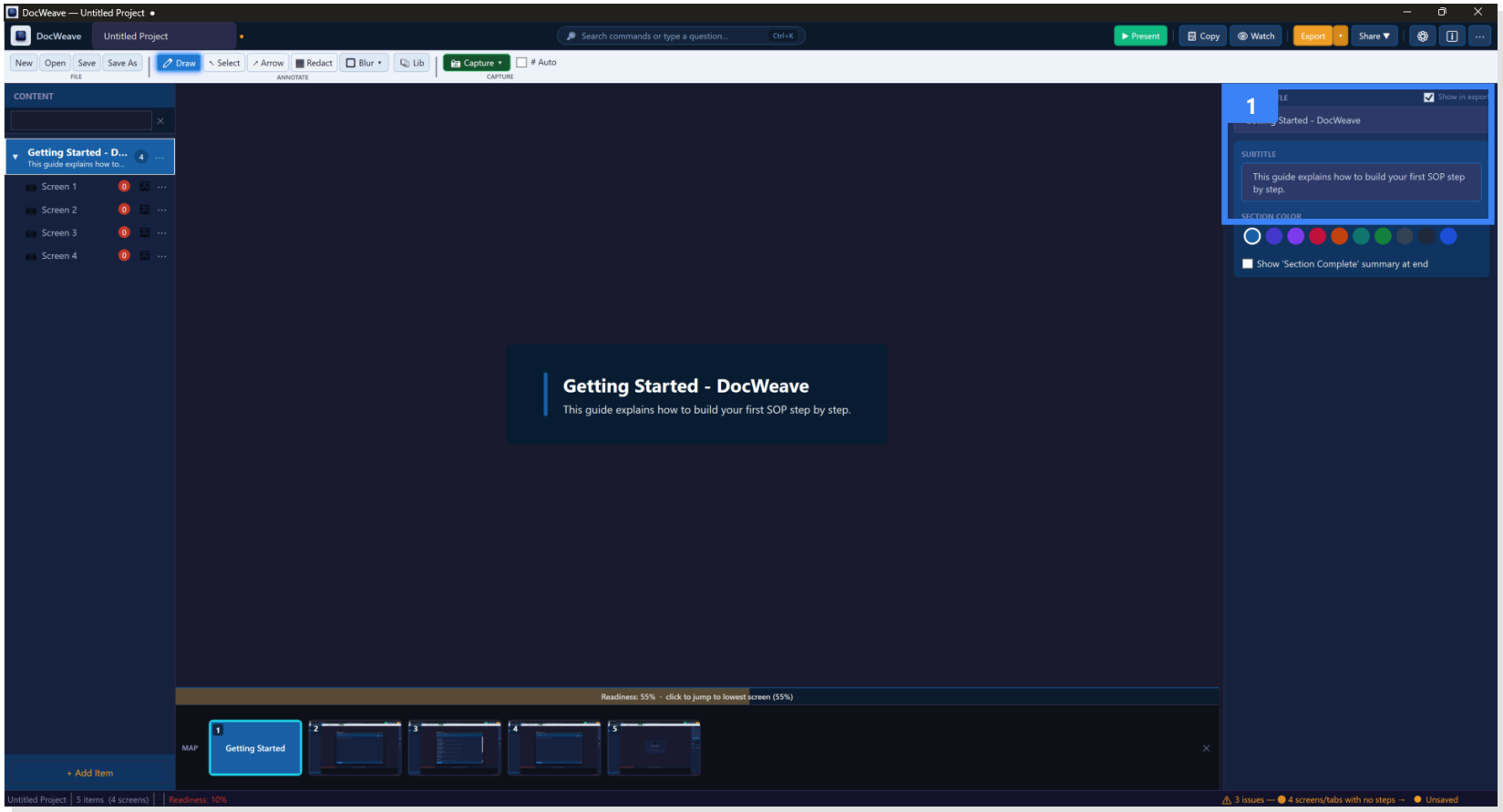




1

STEP 6
Section Divider

You can enter the section title and subtitle.

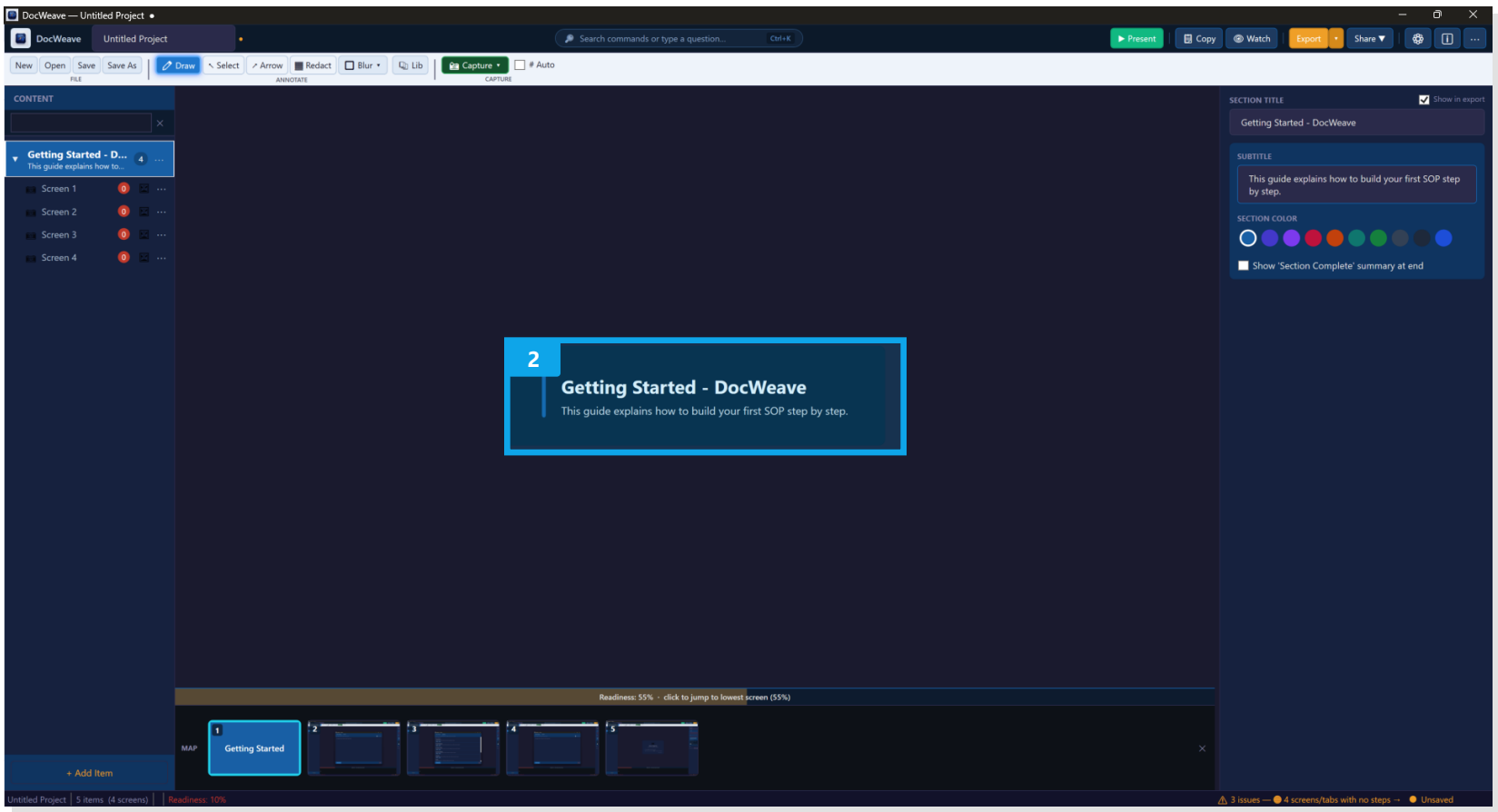




2

STEP 7
Section Divider

The section divider preview can be seen in the central window.

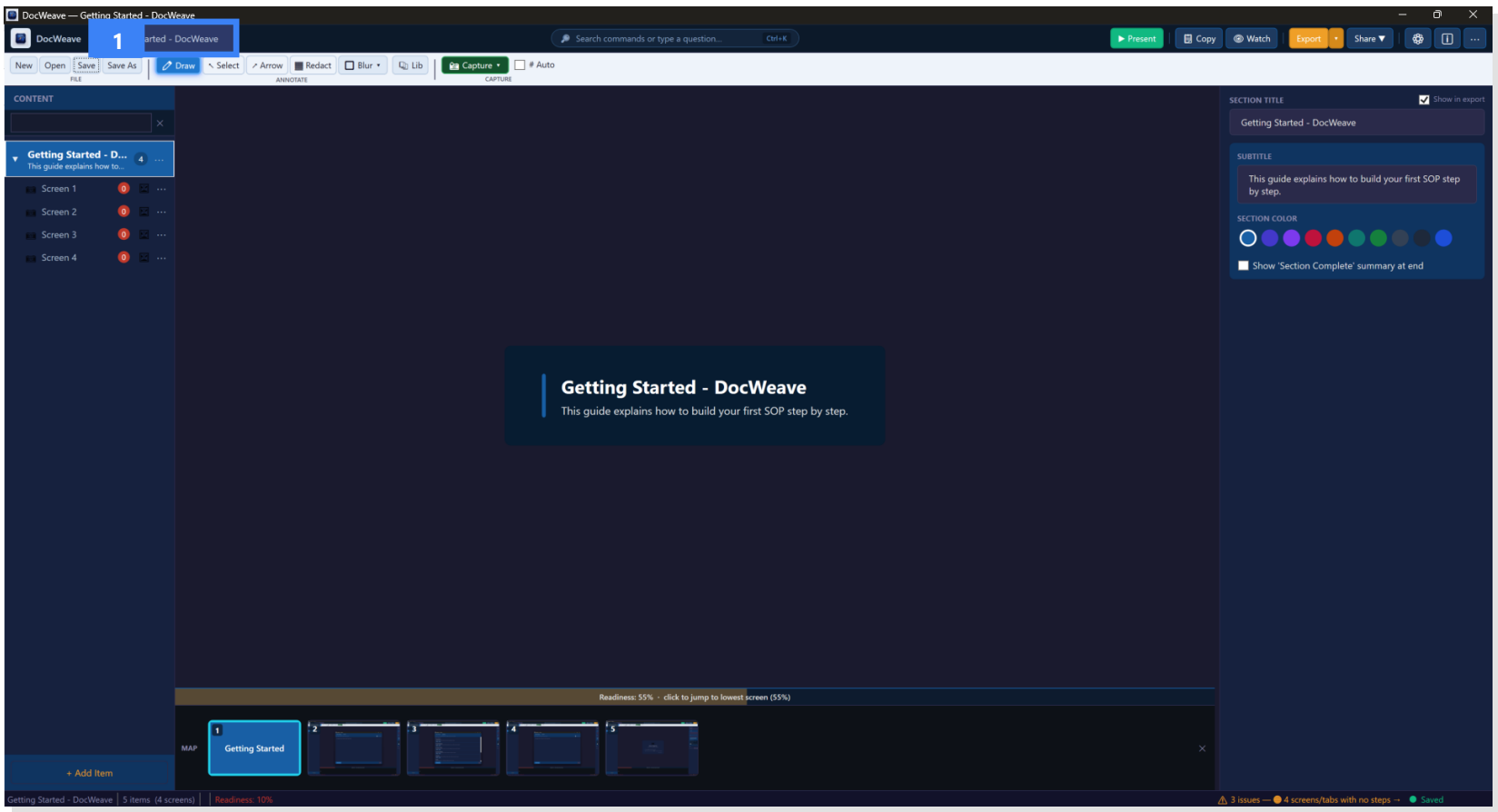




1

STEP 8
Project Name

You can enter the required project name.



Save Project

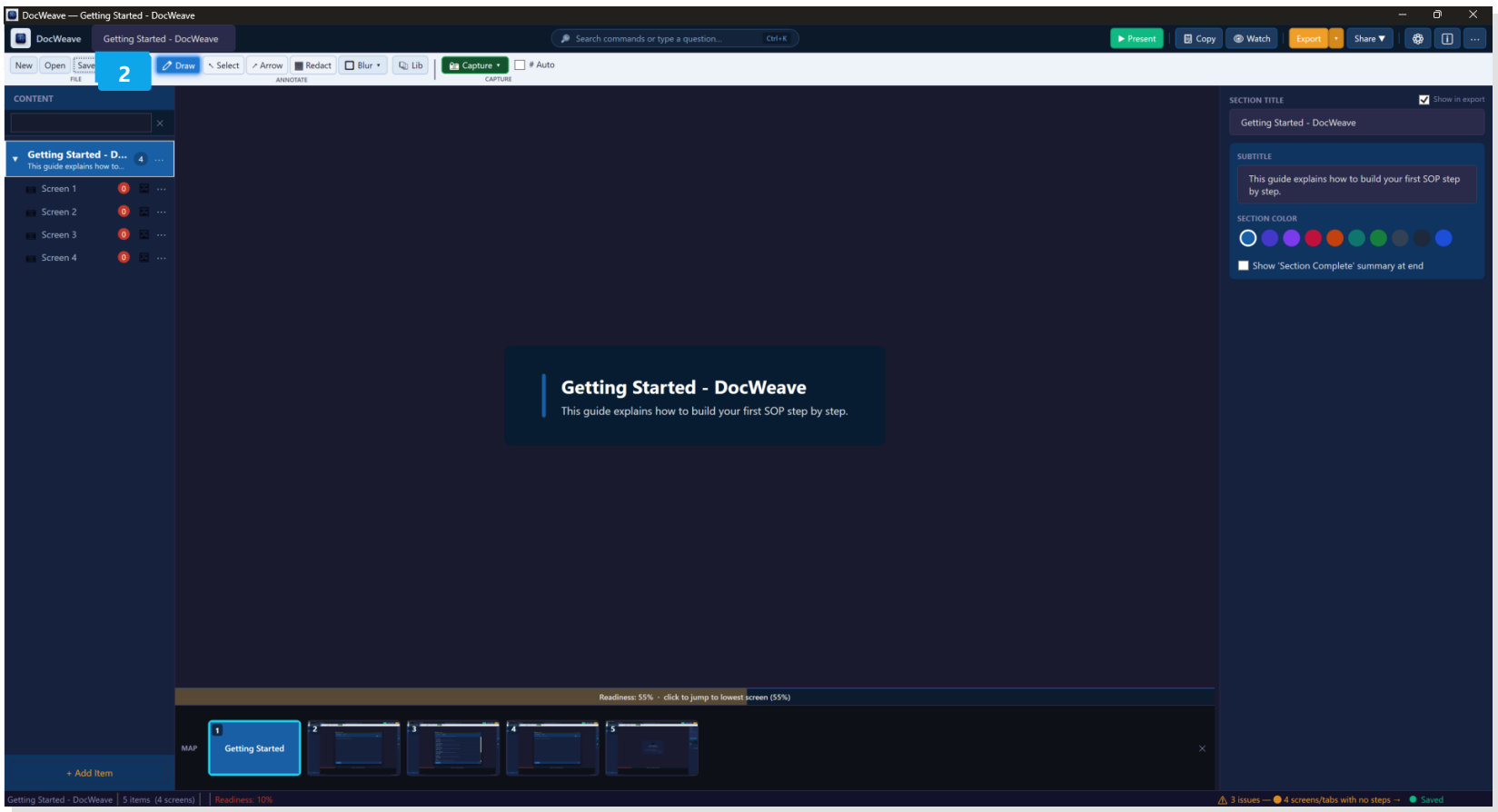


2

STEP 9

Save As

Once the project name is entered, click **Save As** to save the project.



Save Project

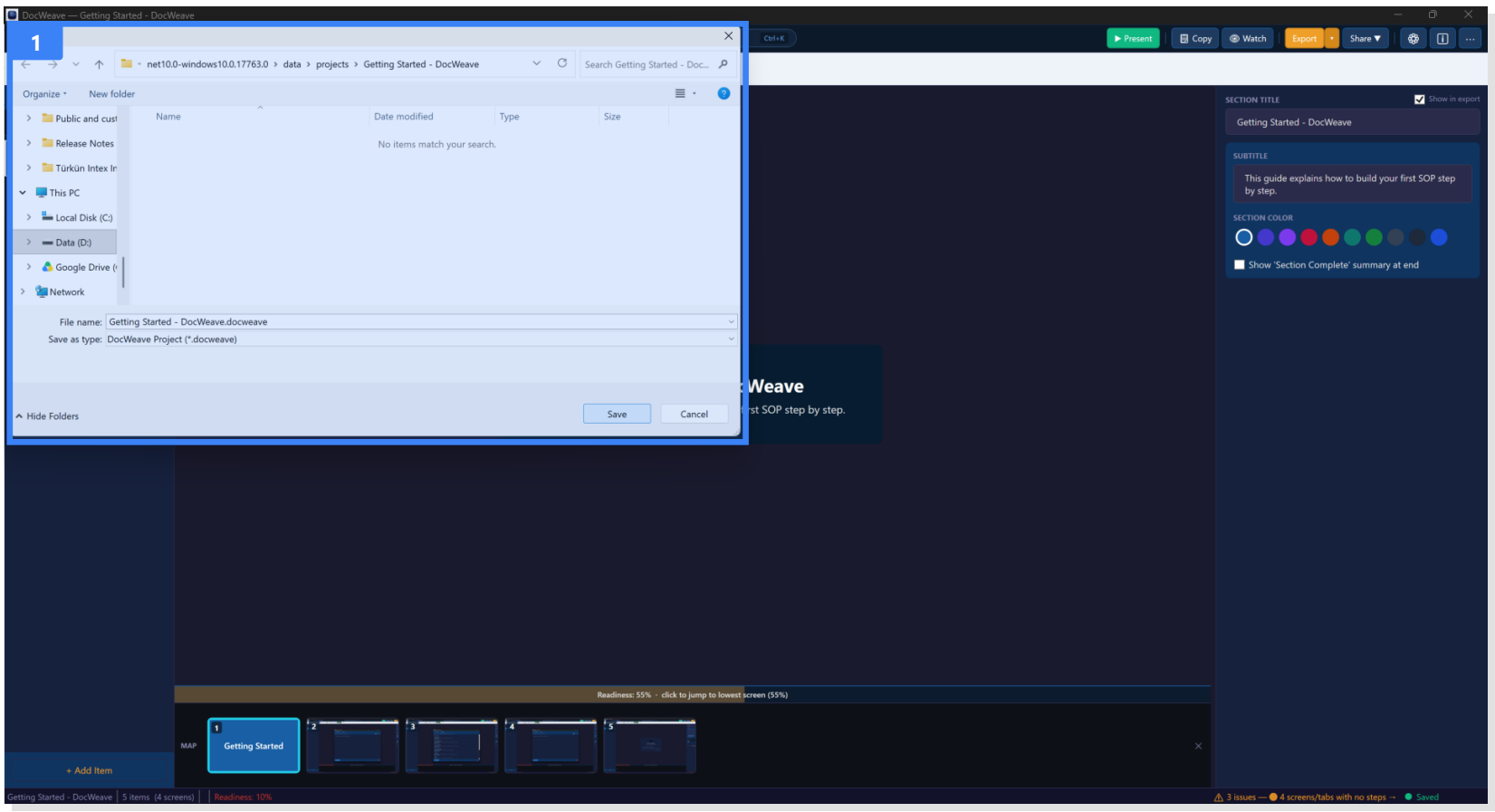


1

STEP 10

Save As

The file browser opens to save the `.docweave`` file. Usually, projects are saved in the **Project** folder, with a separate subfolder for each project containing the `.docweave`` file and all captured screenshots.

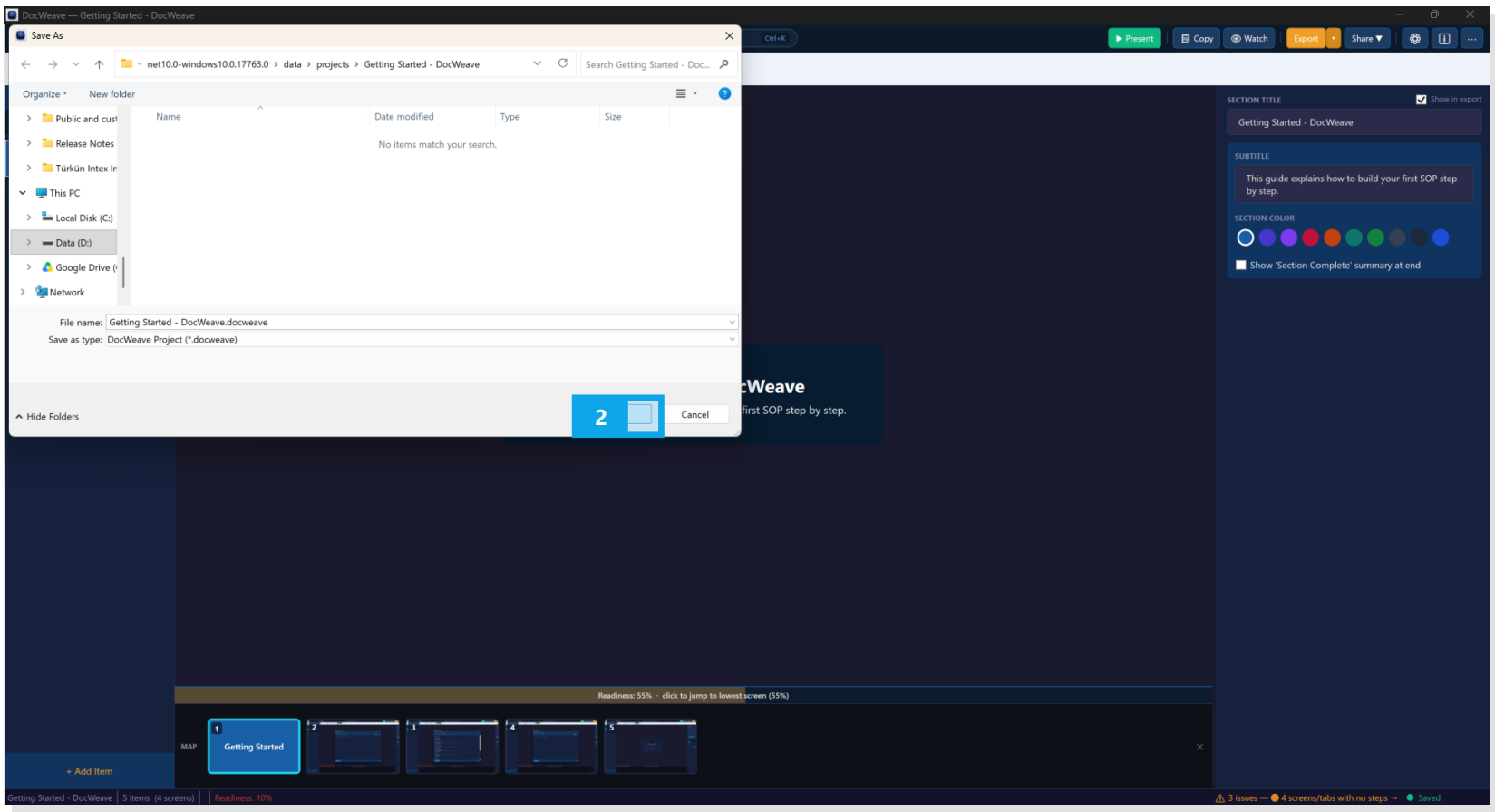




2

STEP 11
Save

We click on save and save the project

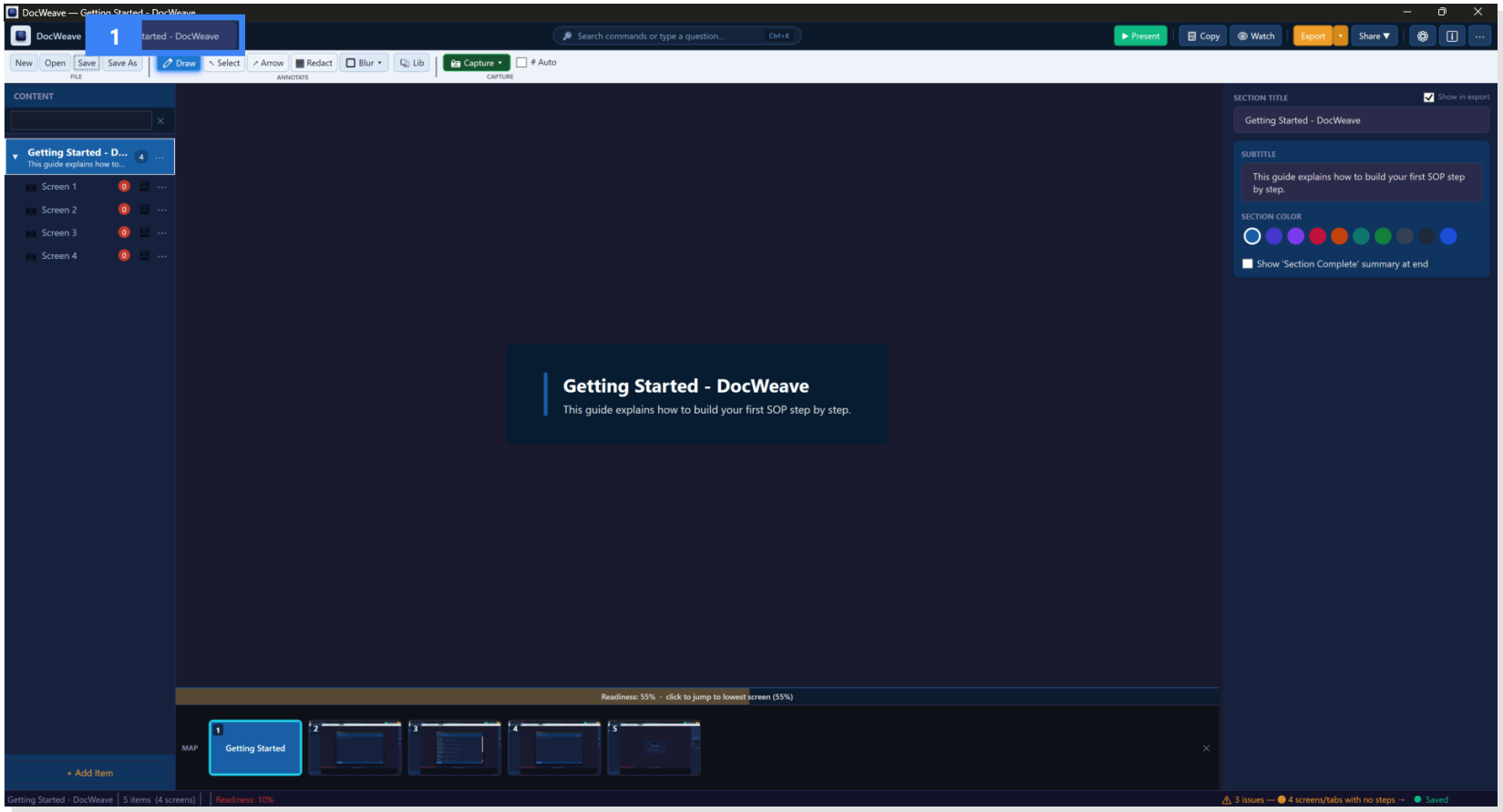




1

STEP 12
Project Name

You can see that the project has been saved successfully.



Save Project



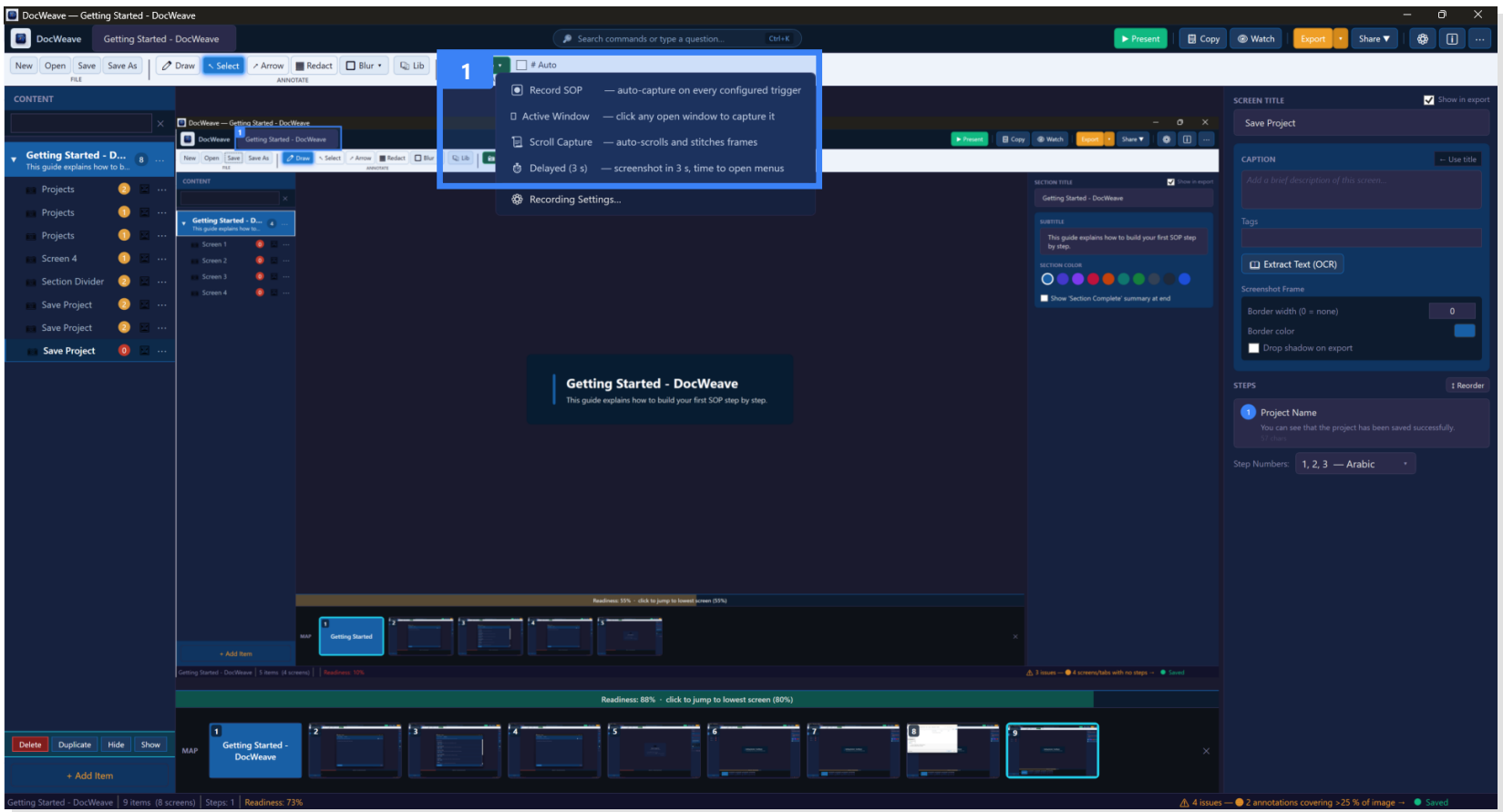
1

STEP 13

Capture

- Record SOP
Hands-free capture mode. Once started, DocWeave automatically takes a screenshot on every trigger you've configured (clicks, key presses, etc.), turning a task you simply perform into a fully sequenced set of steps. Best for documenting a whole workflow end-to-end without stopping to grab each screen.
- Active Window
Click any open window and DocWeave captures just that window — cleanly cropped, no desktop clutter or other apps in the frame. Best for app screenshots where you want a tidy, focused image every time.
- Scroll Capture
Captures content taller than the screen. DocWeave auto-scrolls the page and stitches the frames into one continuous, full-length image. Best for long web pages, chat threads, documents, or settings panels that don't fit in a single view.
- Delayed (3 s)
Fires the screenshot 3 seconds after you click — giving you time to open a menu, hover a tooltip, or set up the exact state you want to capture. Best for transient UI that disappears the moment you click away.

Capture

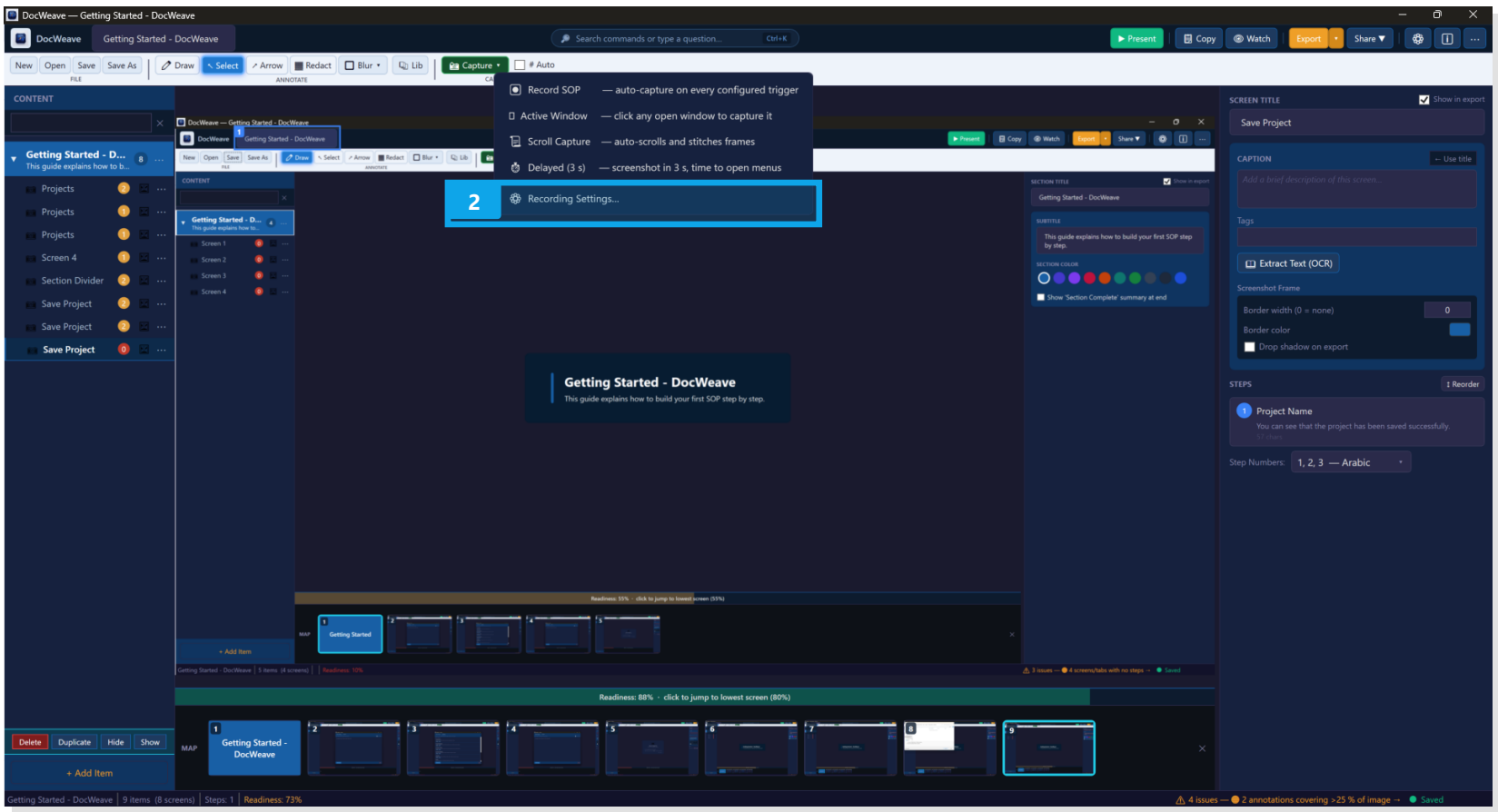




2

STEP 14
SOP Recording Settings

Recording Settings let you choose exactly which actions trigger an automatic screenshot while you're recording a SOP, and how the capture is timed. Tune it once and DocWeave captures the right moments hands-free. Your choices are saved and reused for every future recording.





1

STEP 15
SOP Recording Settings

Triggers — What Starts a Capture

Mouse

- * Left Click: Captures each click as a step. Enabled by default.
- * Right / Middle / Double Click: Captures context menus, middle-click actions, and double-click actions.

Common Keys

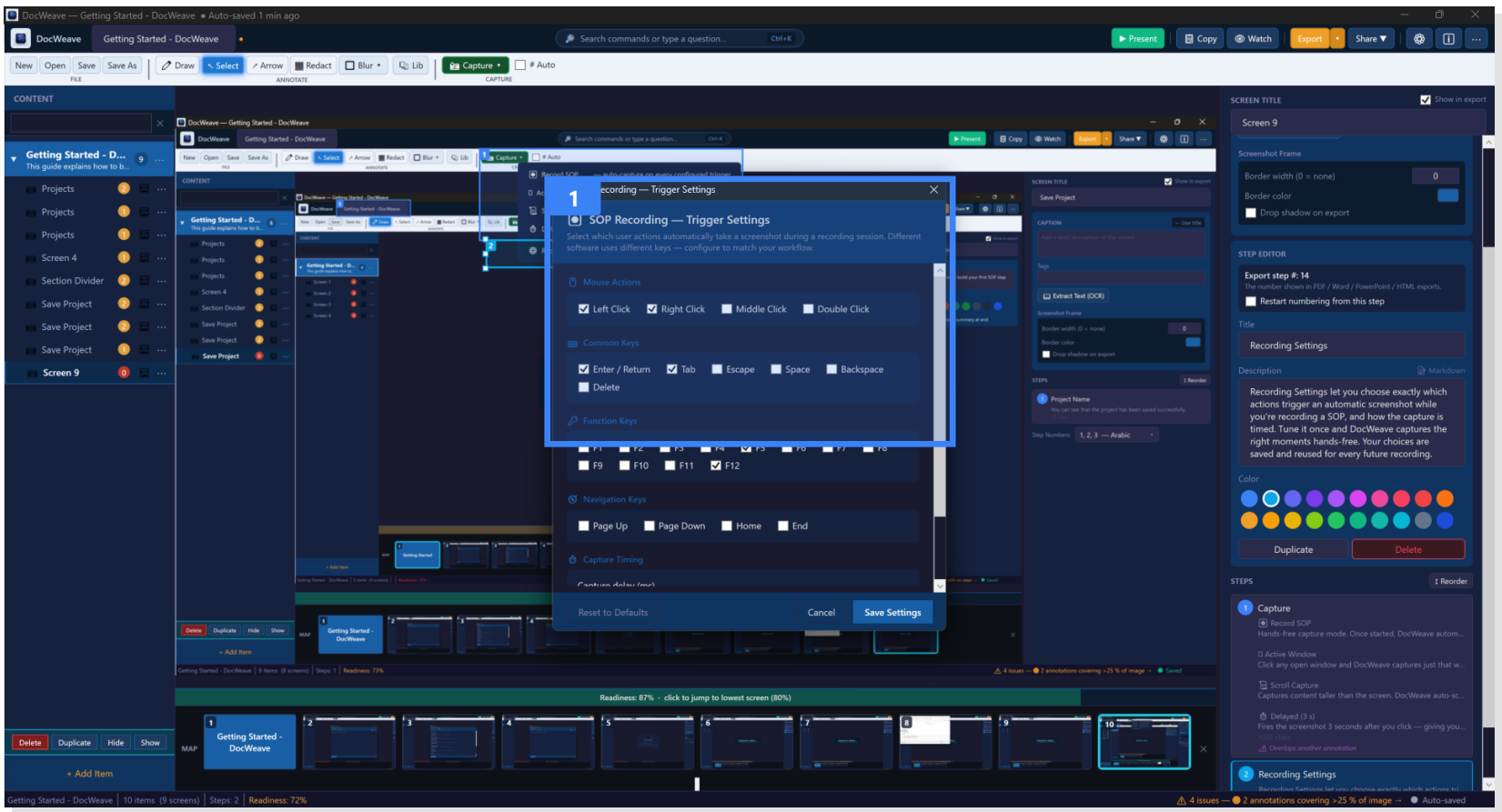
- * Enter: Captures form submissions and confirmations. Enabled by default.
- * Tab, Esc, Space, Backspace, Delete: Captures navigation, cancellation, toggles, and edits.
- * F1–F12: Captures application-specific shortcut actions.

Navigation Keys

- * Page Up, Page Down, Home, End: Captures scrolling and jump navigation.

Timing

- * Capture Delay: Wait time before taking a screenshot, allowing the screen to update properly.
- * Debounce: Minimum gap between captures to avoid duplicate or repeated screenshots.

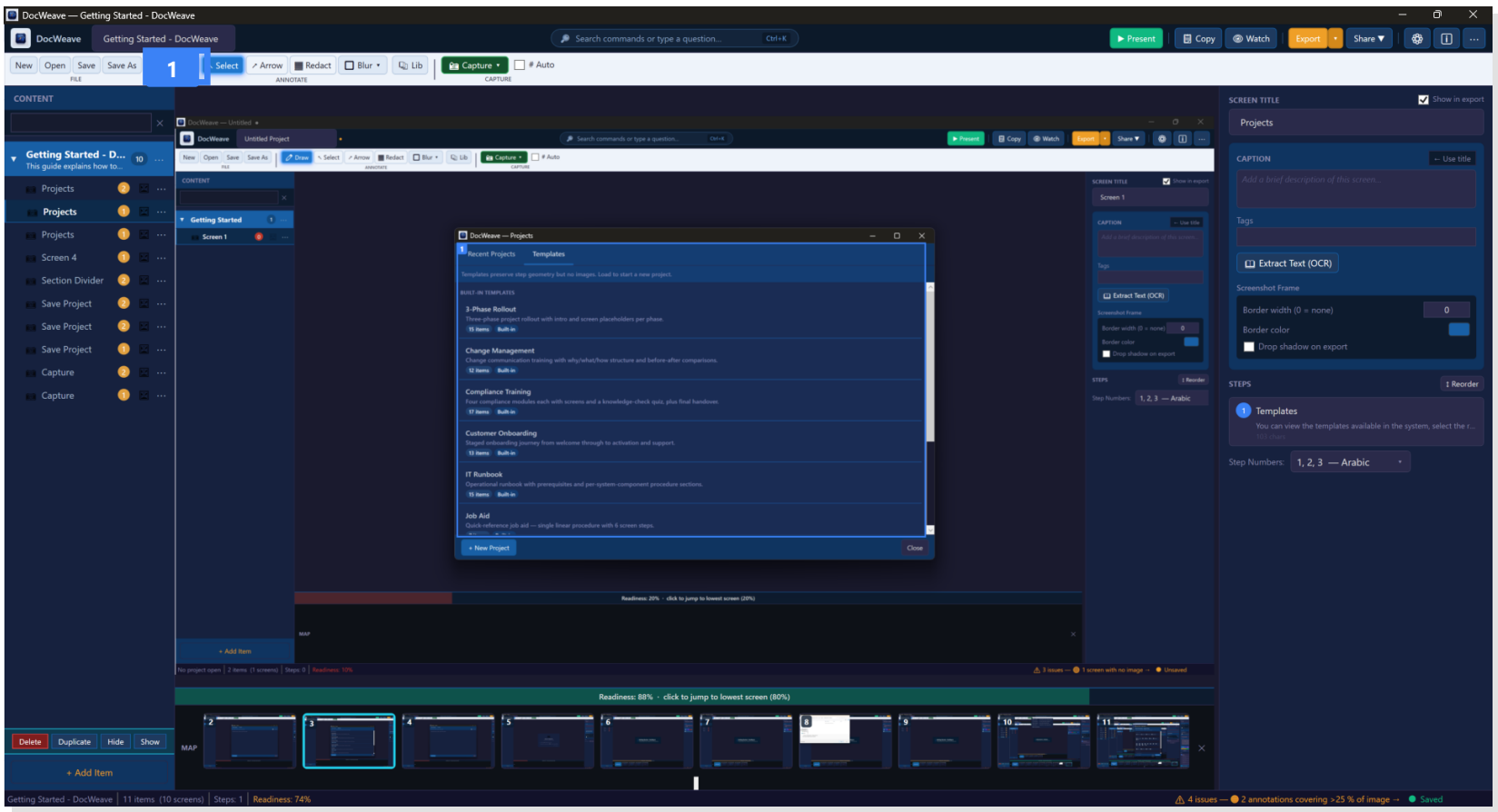




1

STEP 1
Draw Steps

Click the **Draw** button to insert a new step highlighter.

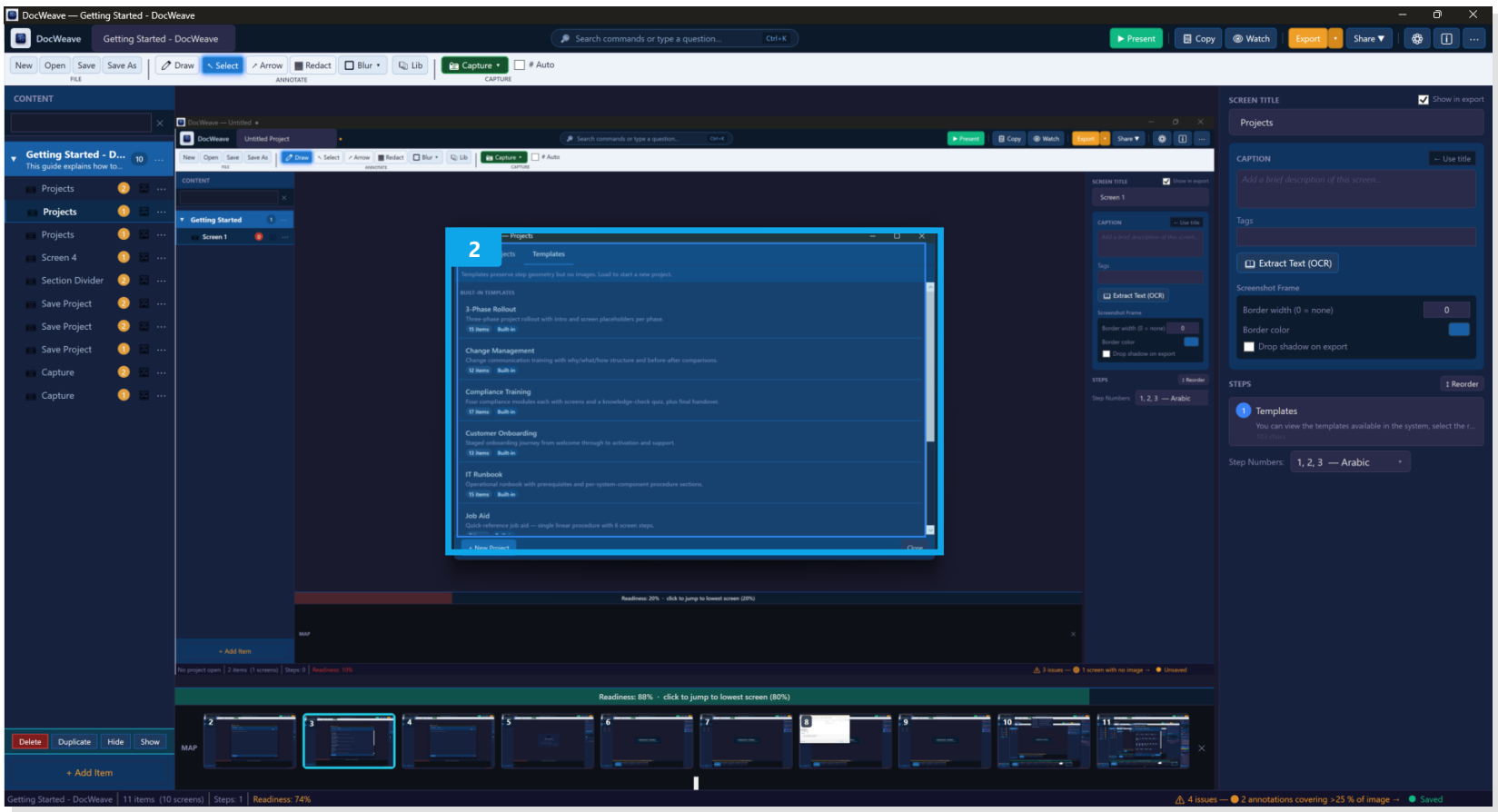




2

STEP 2
Draw Steps

Highlight the area that you want to include in the step.





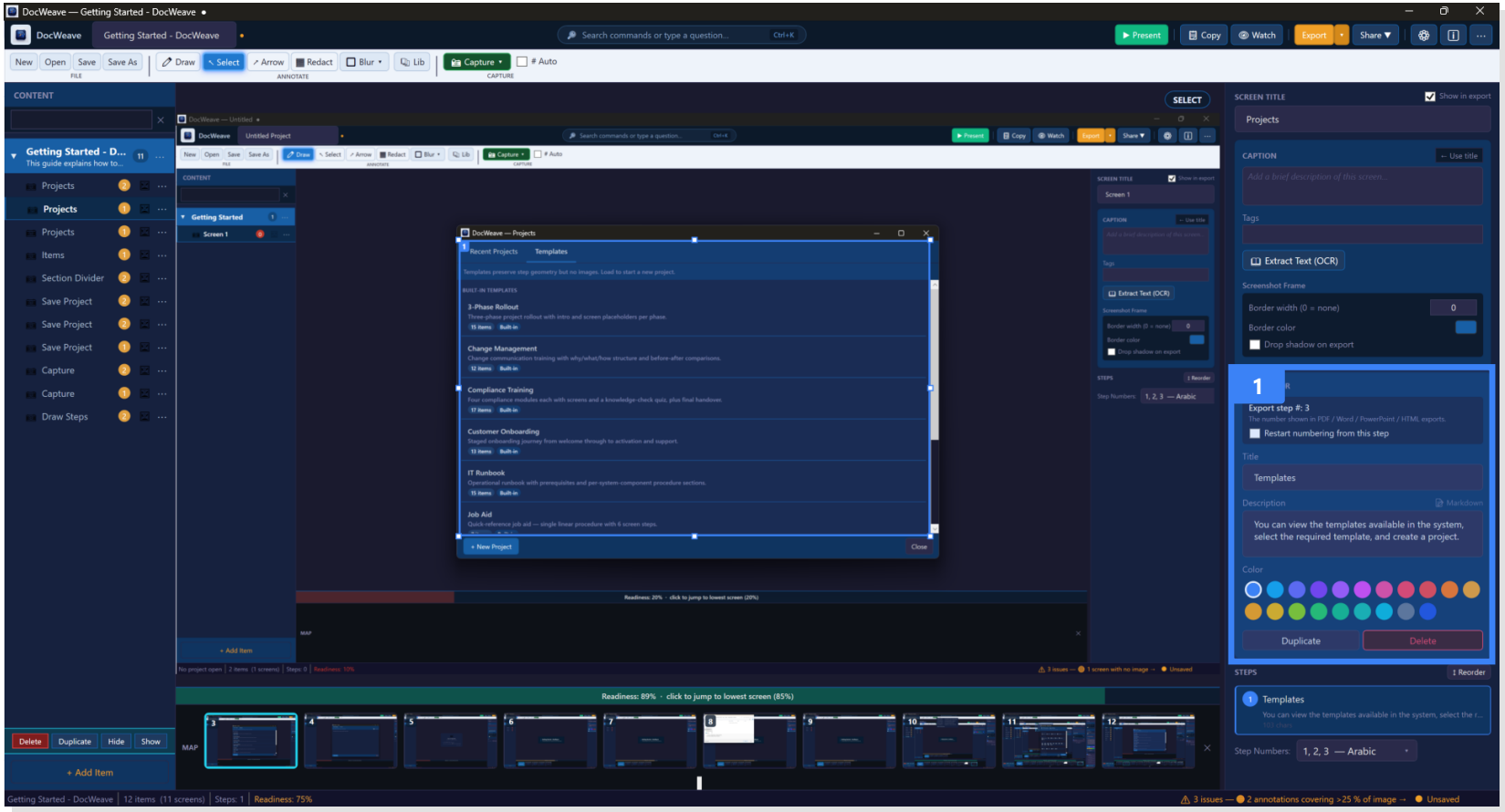
1

STEP 3
Draw Steps

In the right-hand panel, you can enter the title and description of the step.

DocWeave continues assigning step numbers in the output until the numbering is reset. To reset the step count at any point, click **Restart Numbering**.

The **Export Step Number** field shows the step number that will be assigned by DocWeave in the final output.



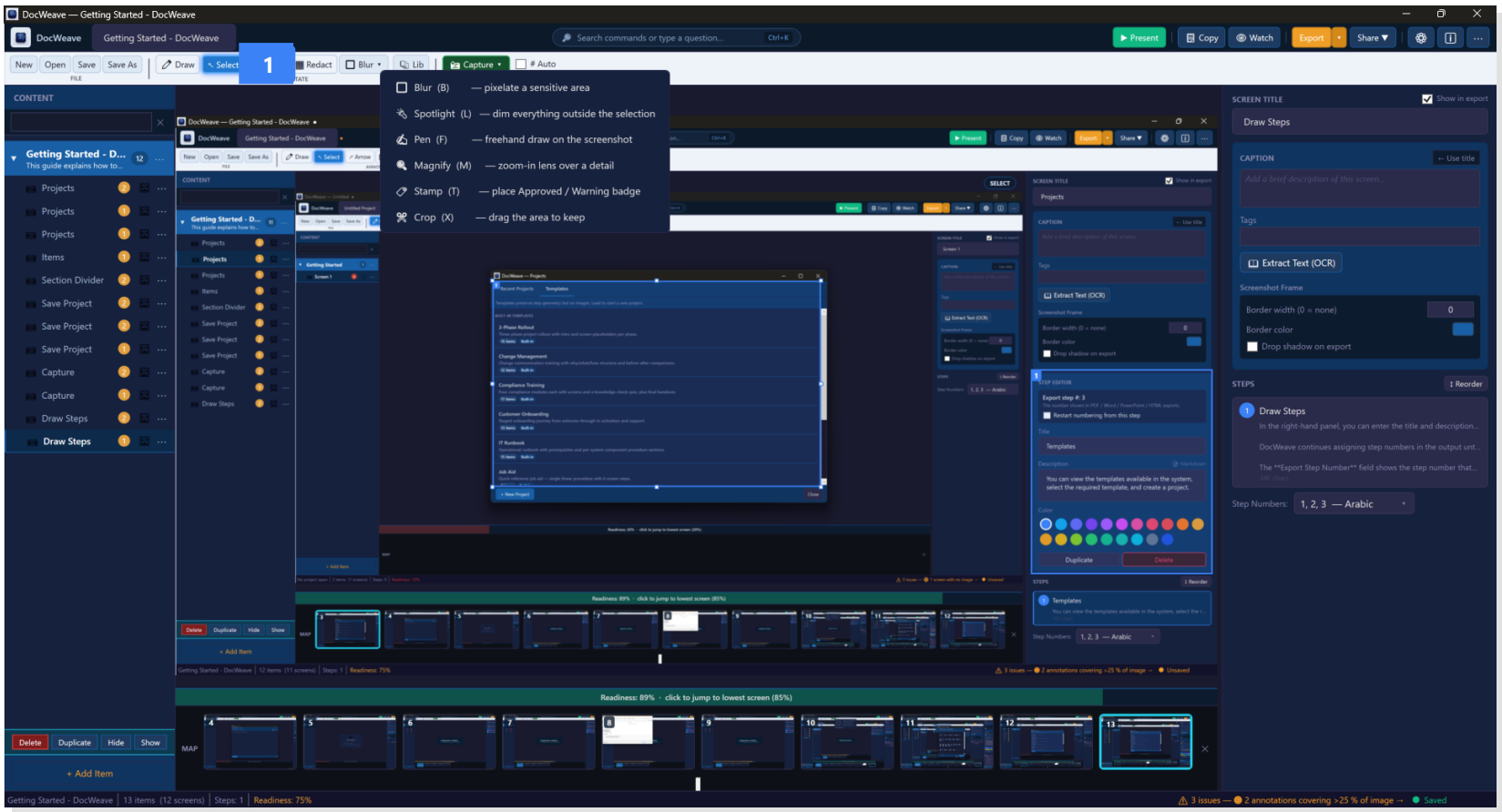


1

STEP 1

Arrow

Draws a directional arrow on the screenshot to point at a button, field, or area. Use it to direct the reader's eye to exactly where the action happens in a step.

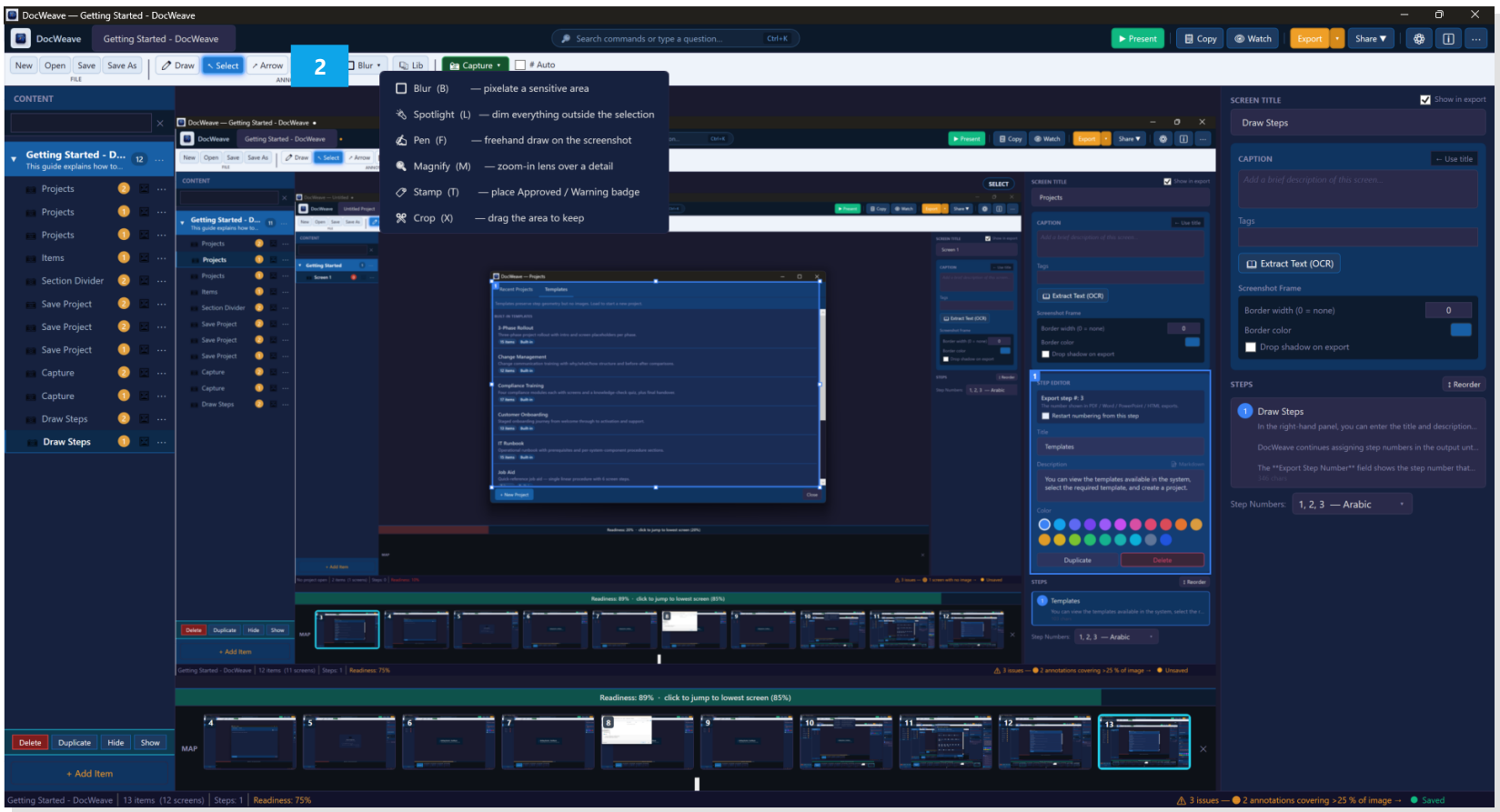




2

STEP 2
Redact

Permanently masks sensitive information with a solid block. You can choose the style — black fill, white fill, or blur — so names, emails, account numbers, or other private data are hidden in the exported document.



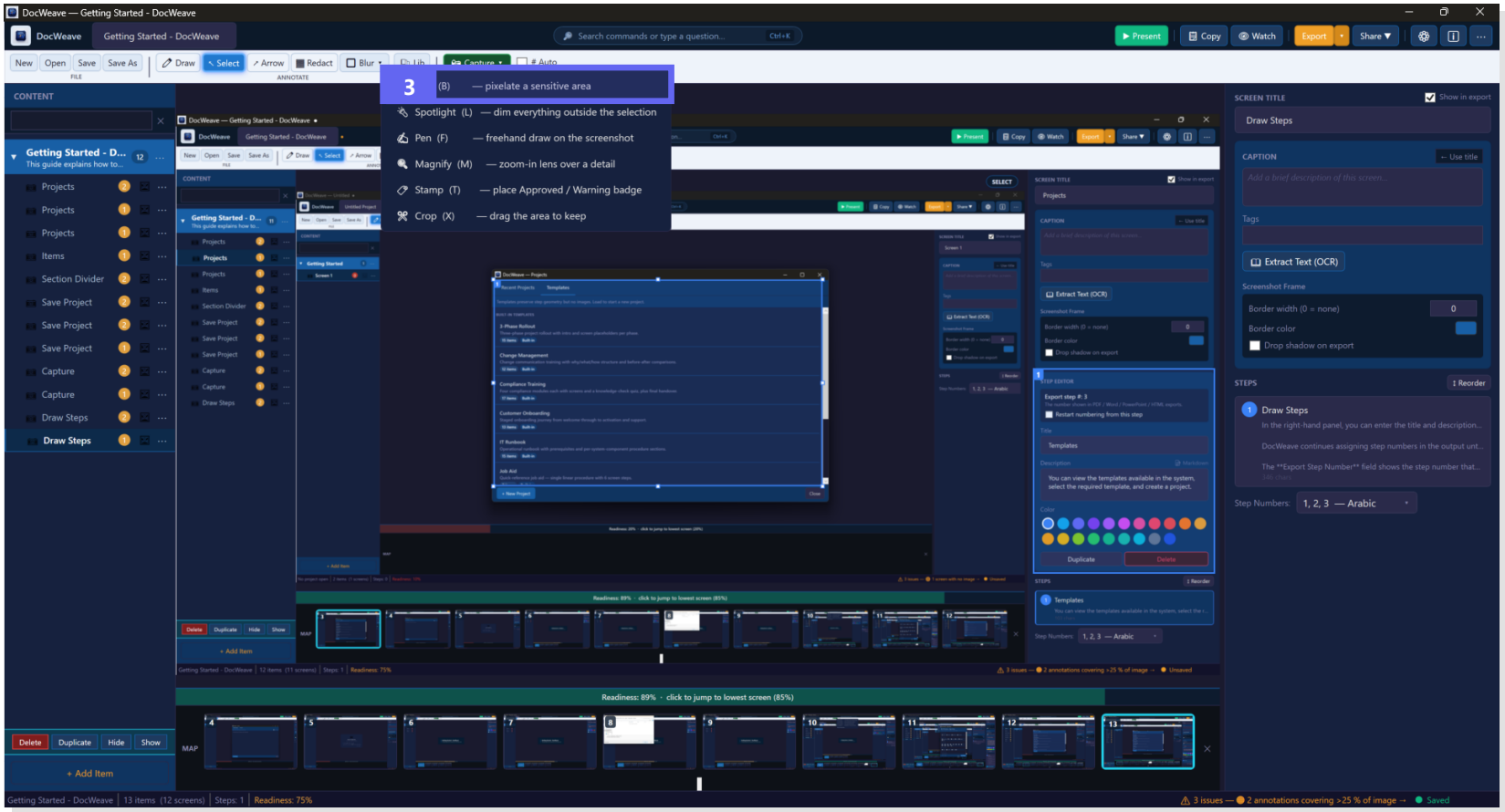


3

STEP 3

Blur (B)

Pixelates a selected area so the content underneath becomes unreadable while still showing something is there. Good for softening sensitive or distracting detail without a hard black box.

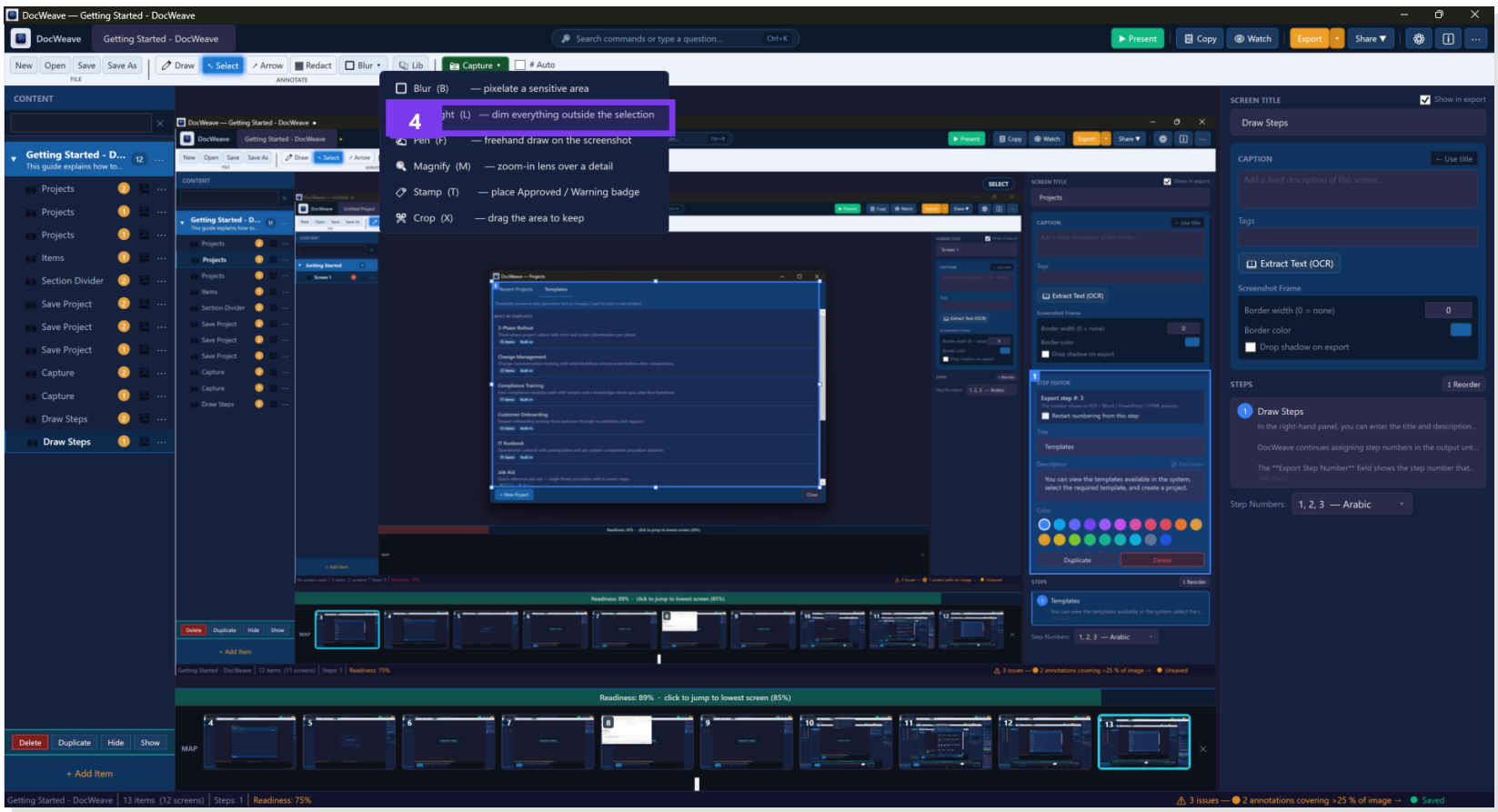




4

STEP 4
Spotlight (L)

Dims everything outside the selected region, leaving the important part bright and in focus. Best for isolating one control or section on a busy screen.

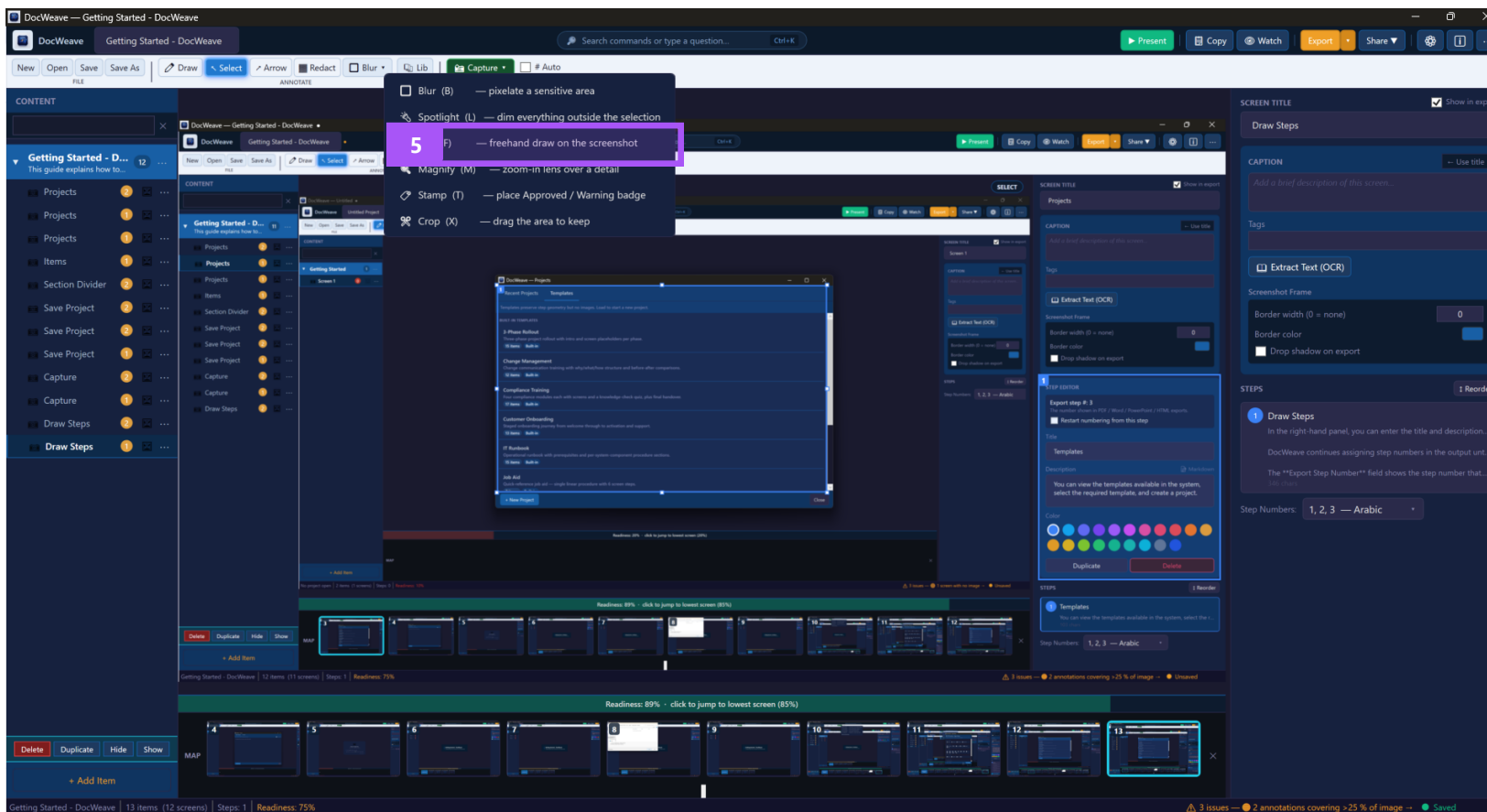


5

STEP 5

Pen (F)

Freehand drawing directly on the screenshot — circle a button, underline text, or sketch a note in your own hand. The most flexible markup tool when a shape doesn't fit.

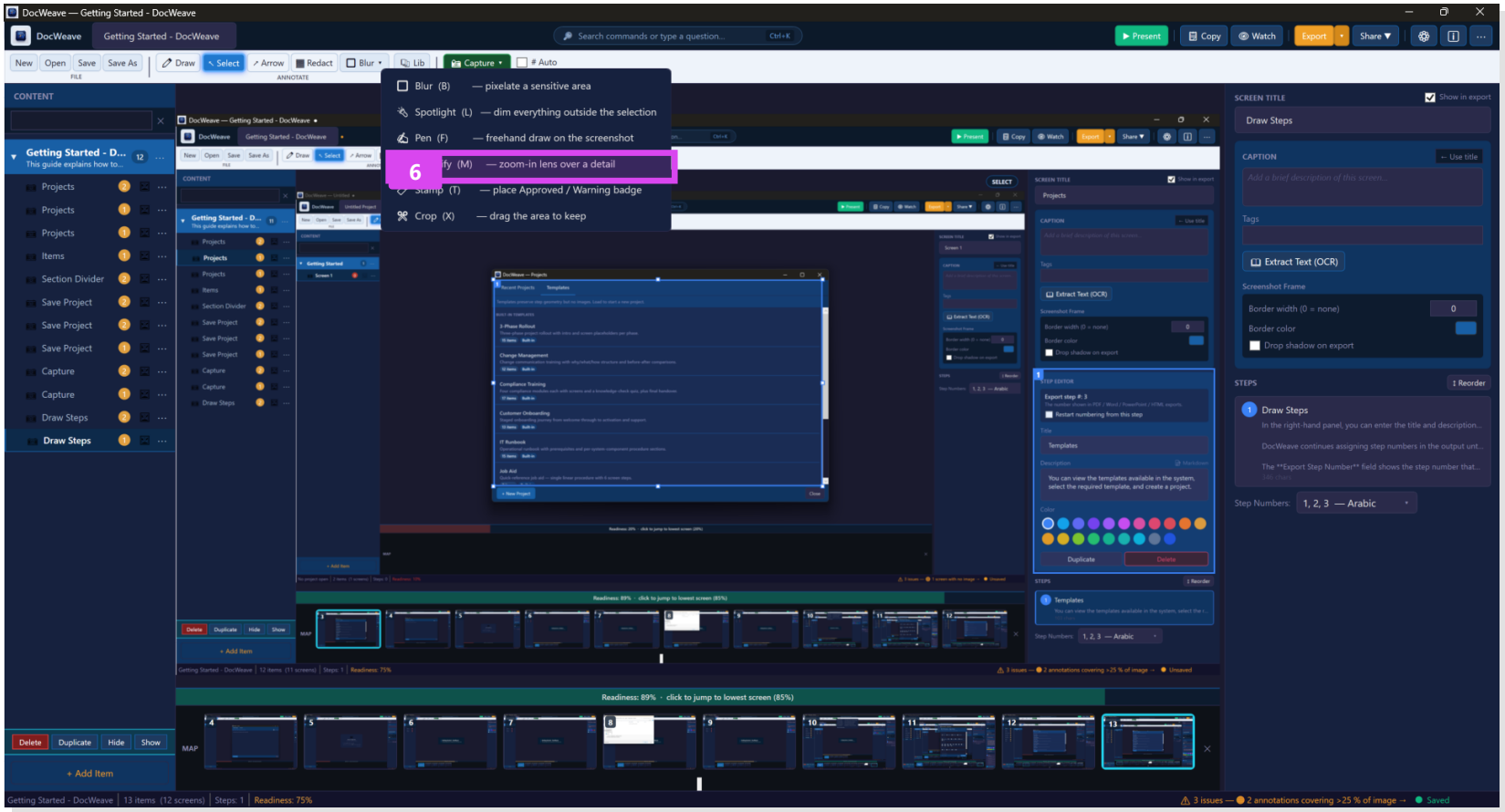




6

STEP 6
Magnify (M)

Places a zoom-in lens over a small detail, enlarging it (default 2x) so tiny UI elements — checkboxes, icons, fine print — are clearly visible in the final doc.

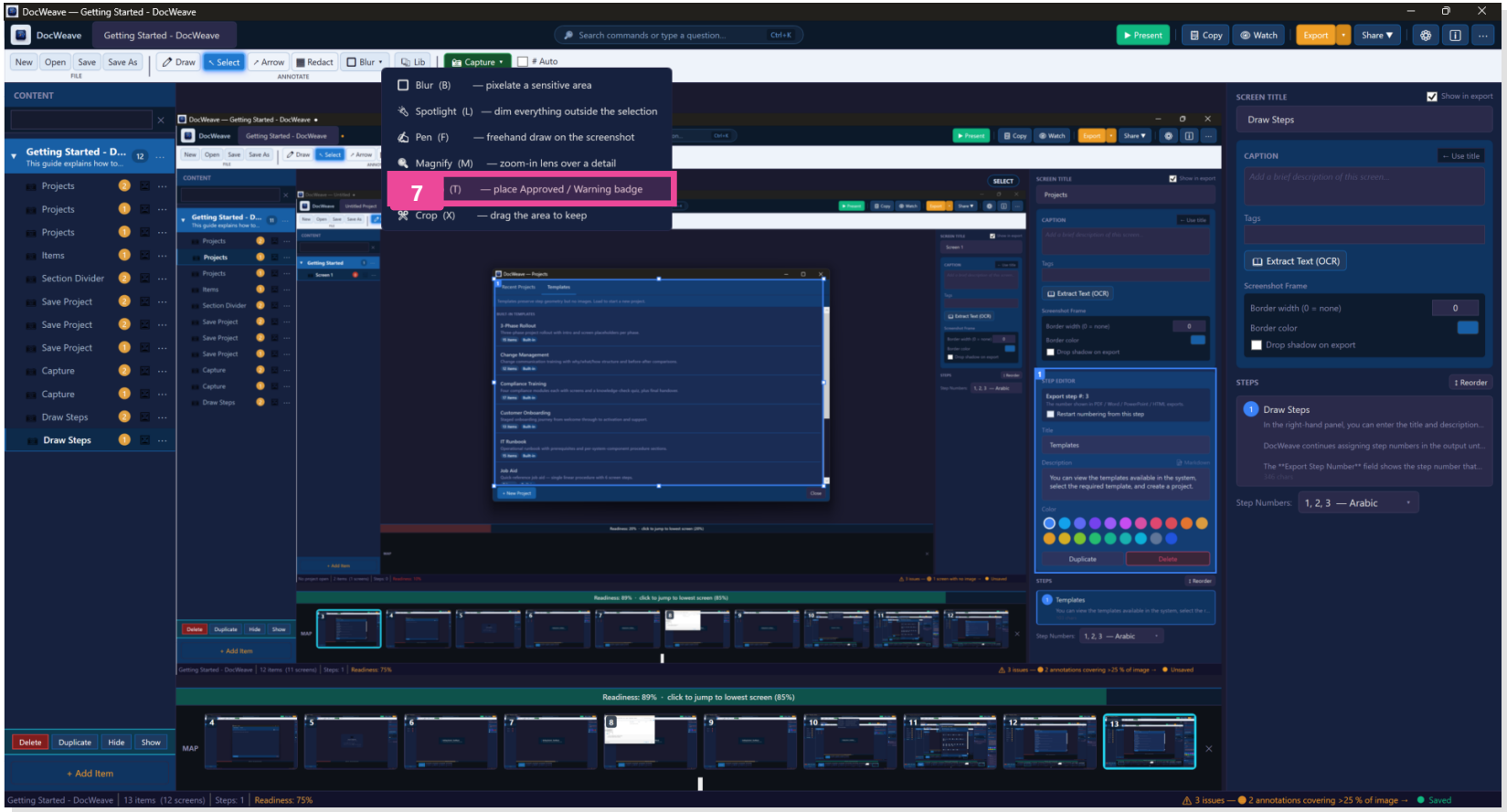




7

STEP 7
Stamp (T)

Drops a pre-made badge onto the screen, such as Approved or Warning, to flag status or call attention to a step at a glance.

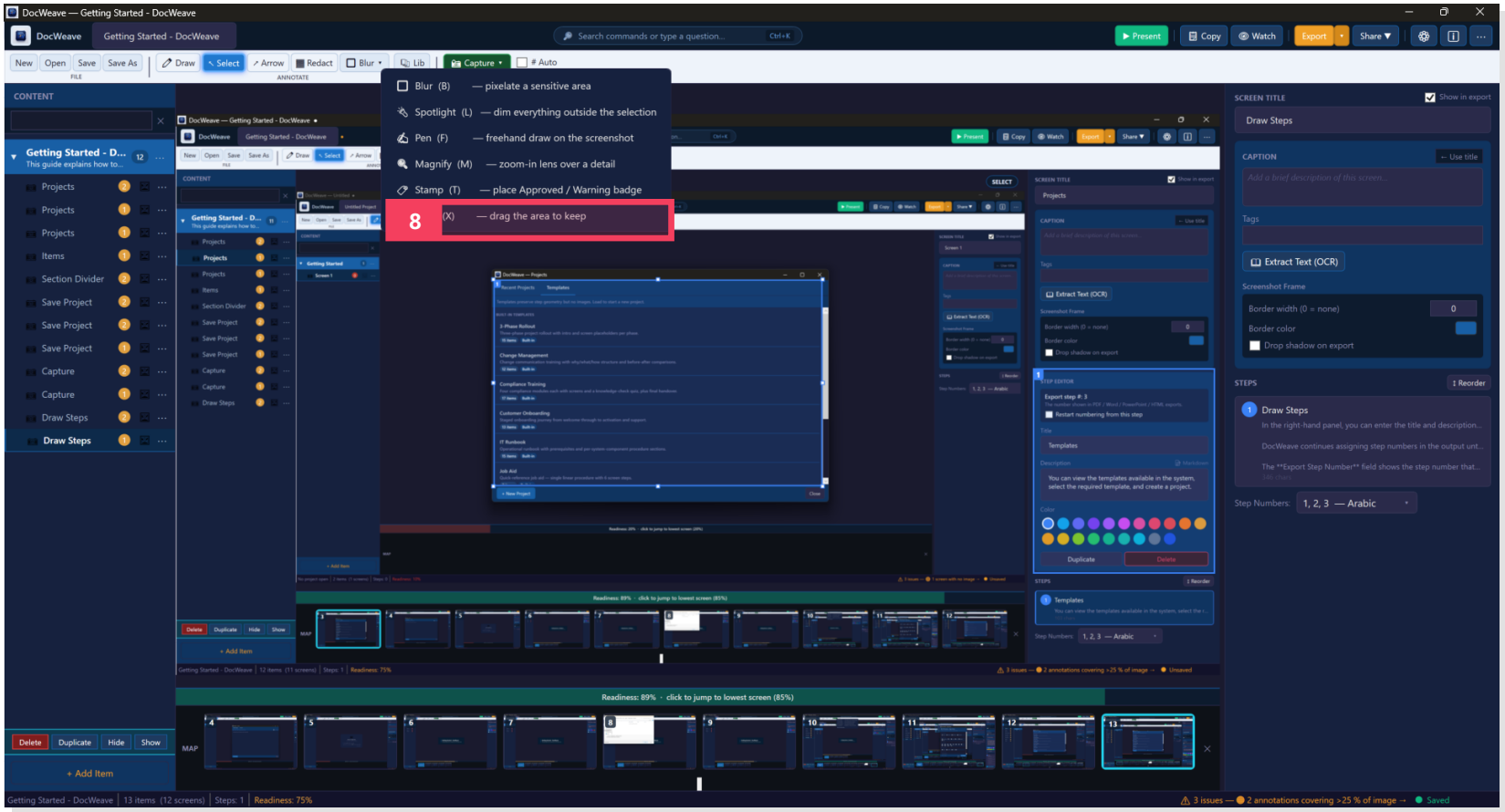




8

STEP 8
Crop (X)

Drag to select the area you want to keep; everything outside is trimmed away. Use it to remove clutter, focus on the relevant window, or tidy the screenshot's framing.



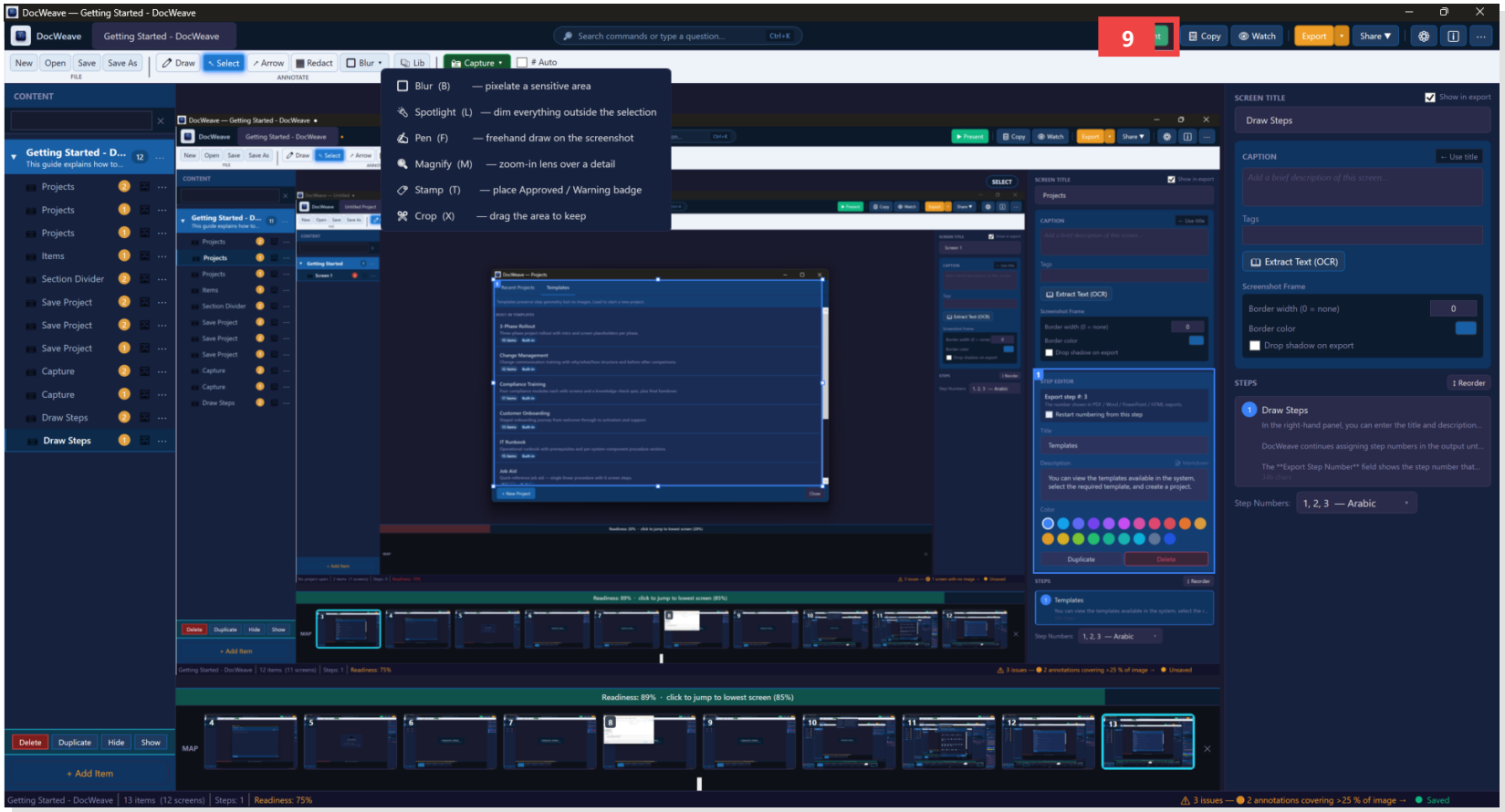


9

STEP 9

Present

Turns your project into a full-screen, slideshow-style walkthrough — right inside DocWeave, no export needed. Each screen, step, and content block becomes a slide you advance through one action at a time. As you move through a screenshot's steps, a callout bubble highlights the current instruction and a spotlight dims everything else so attention stays on the right spot. It also plays your richer blocks — timelines, process flows, comparisons, quizzes — as their own slides, and supports presenter notes. Best for live training sessions, demos, and walking a colleague or client through a procedure in real time.





10

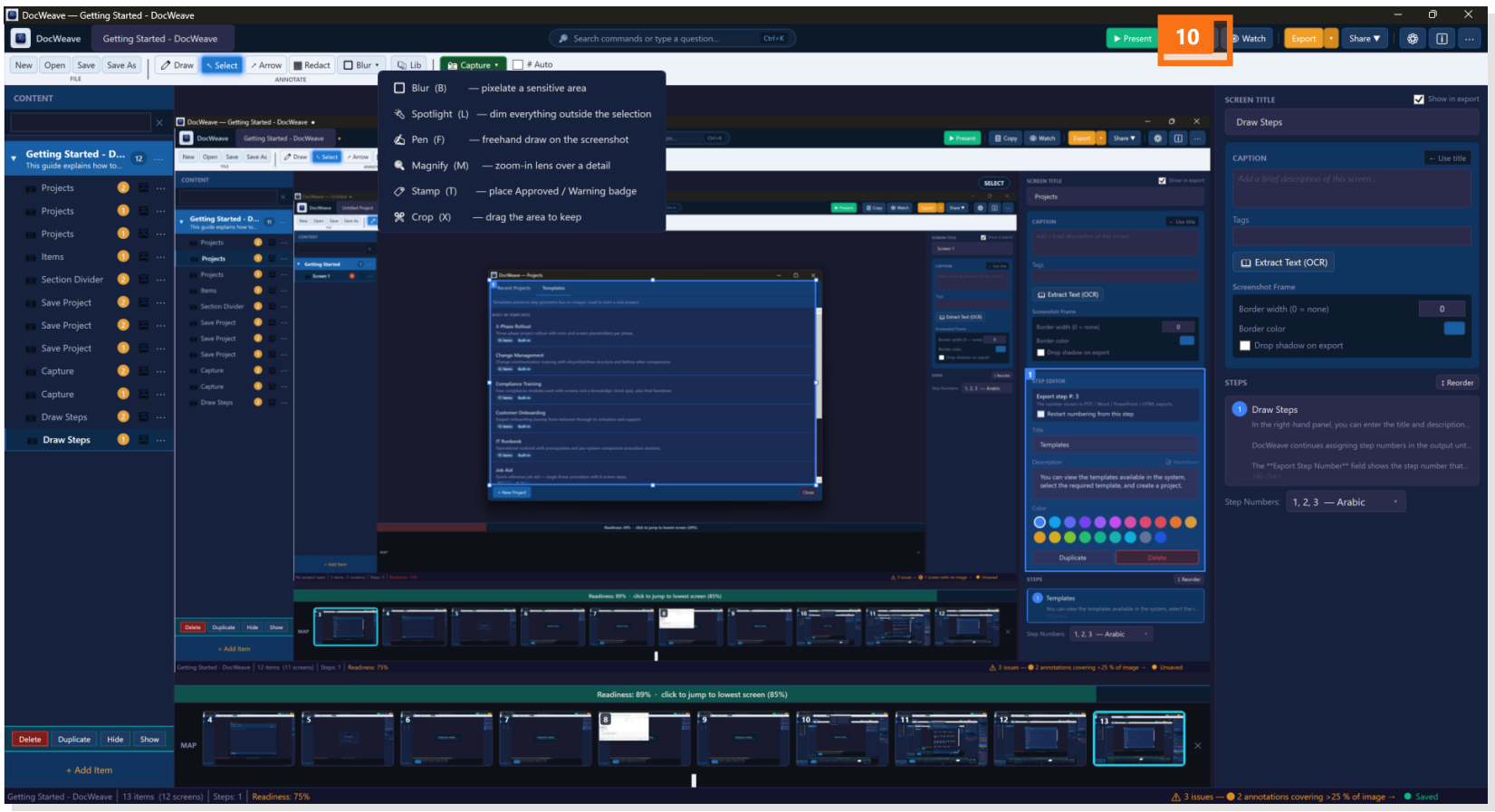
STEP 10

Copy

Flattens the current Screen — the screenshot plus everything you've layered on it (step boxes, arrows, numbered badges, blur, spotlight, redactions, freehand pen) — into a single PNG and places it on the Windows clipboard.

Use it to: Paste a finished, annotated screenshot straight into Outlook, Teams, Slack, or Word without exporting the whole document.

Shortcut: Ctrl+Shift+C
Requires: a Screen that has an image
Direction: DocWeave → clipboard (sends out)





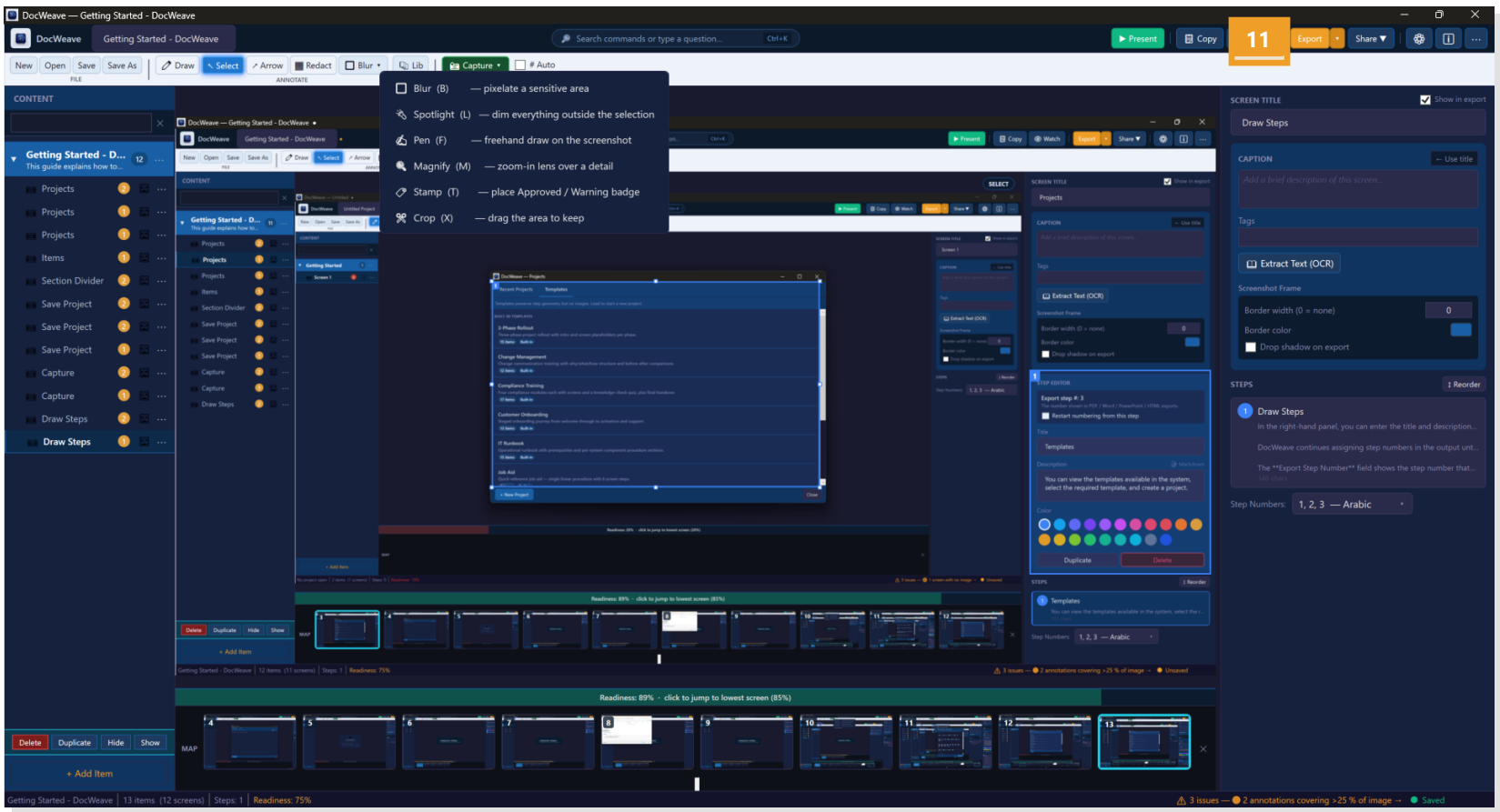
11

STEP 11
Watch

A toggle that turns on Clipboard Watch Mode. While ON, any image you copy from outside DocWeave (Snipping Tool, browser, Excel, etc.) is intercepted into a queue instead of going nowhere — an orange badge beside the button shows how many captures are waiting, and clicking it lets you triage (accept into the project or discard).

Use it to: Capture a whole sequence of screenshots in another app without alt-tabbing back to DocWeave after each snip.

State: button turns green while watching
Smart: ignores duplicate images and pauses while DocWeave itself is focused (so it never grabs your own UI)
Direction: clipboard → DocWeave (pulls in)
In short: Copy pushes one finished screen out to the clipboard; Watch pulls many incoming screenshots in from the clipboard.

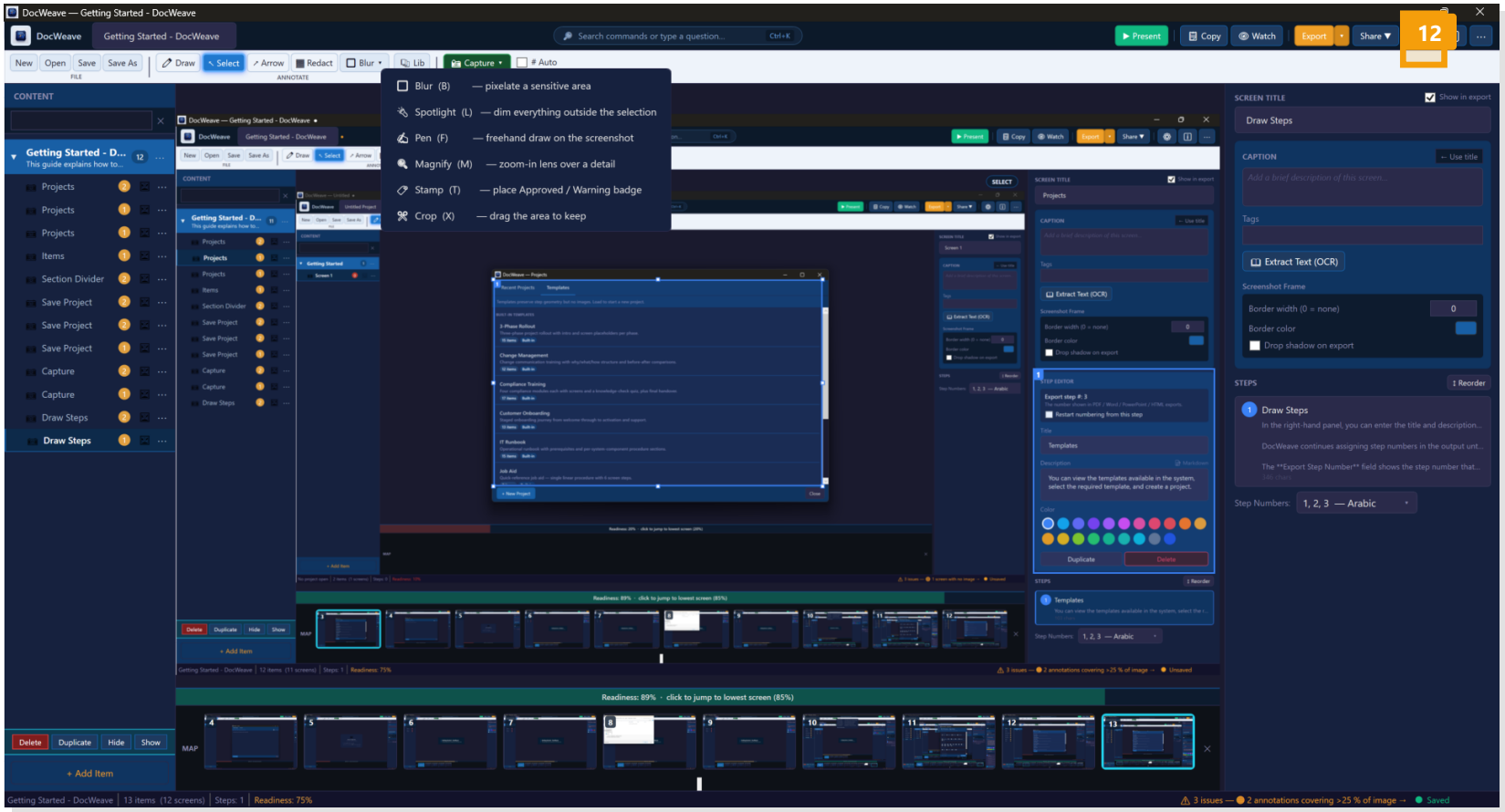




12

STEP 12
Branding Setting

Click this option to open the Branding Settings page.





1

STEP 13
Branding Settings

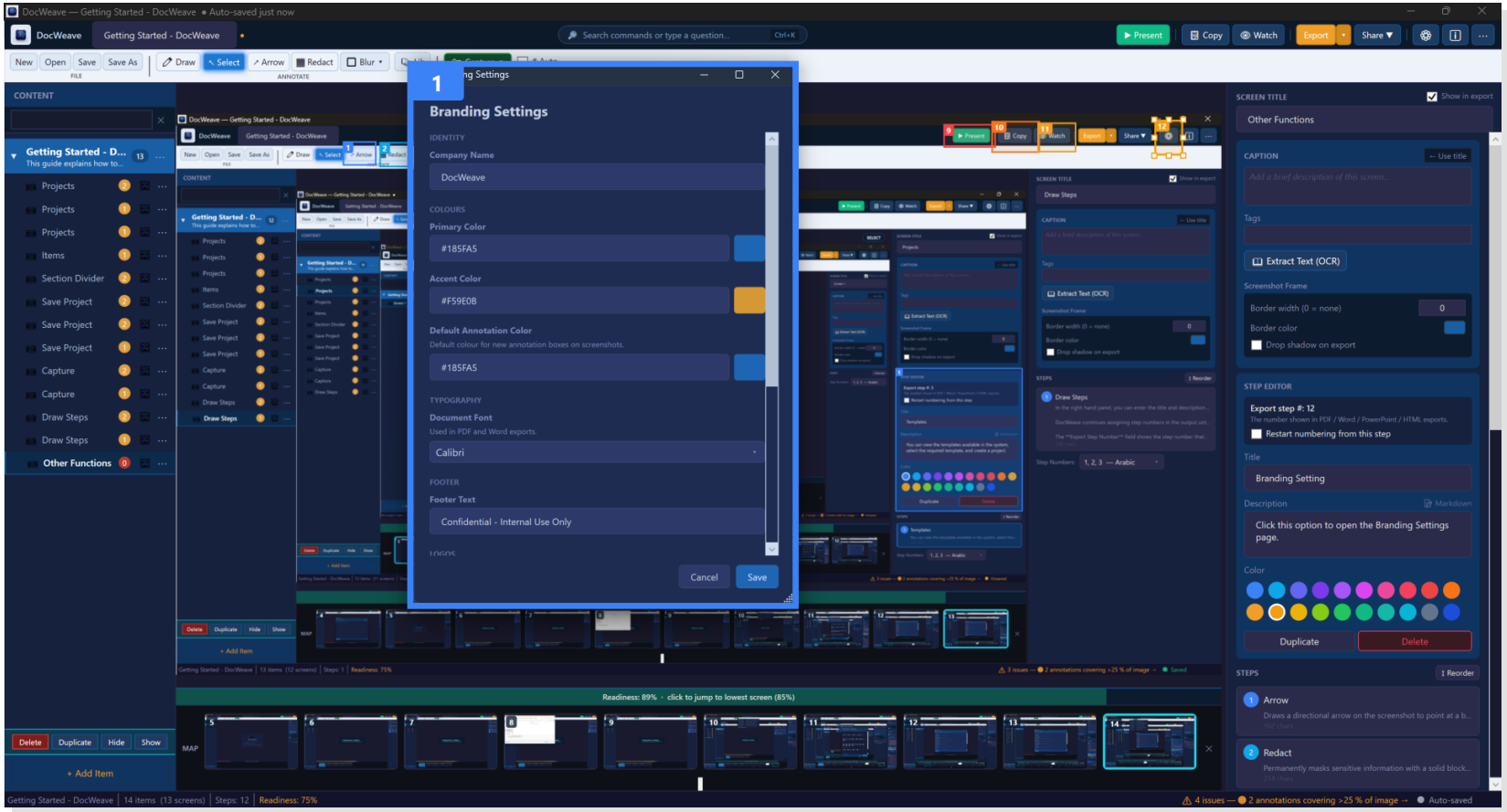
Defines the visual identity stamped onto every exported document — logos, colors, company name, footer, and font. Set it once and all exports inherit it automatically.

- Identity
- Company Name — your organization's name, shown in document headers/title areas. (default: "My Company")
 - Primary Logo — the main logo image (stored as logo.png) shown in the header of the app and exported docs.
 - Secondary Logo — a smaller logo for the document footer, for a co-brand or a compact mark.

- Colors
- Primary Color — the main brand color used for headings, banners, and key accents in exports. (default: deep blue #185FA5)
 - Accent Color — the secondary highlight color for emphasis elements. (default: amber #EF9F27)
 - Annotation Color — the default color applied to new annotation boxes/arrows when you start marking up a screenshot. (default: #185FA5)

- Document
- Footer Text — the line printed at the bottom of every page, typically a confidentiality or copyright notice. (default: "Confidential – Internal Use Only")
 - Font Family — the body font used throughout exported documents. (default: Calibri)

- Client Brand Library (multi-client)
- DocWeave can also store multiple saved brand profiles — one per client. Each profile bundles its own logos, colors, footer, and font under a client name, so you can switch the entire look of your exports to match whichever client you're producing docs for, instead of re-entering everything each time.

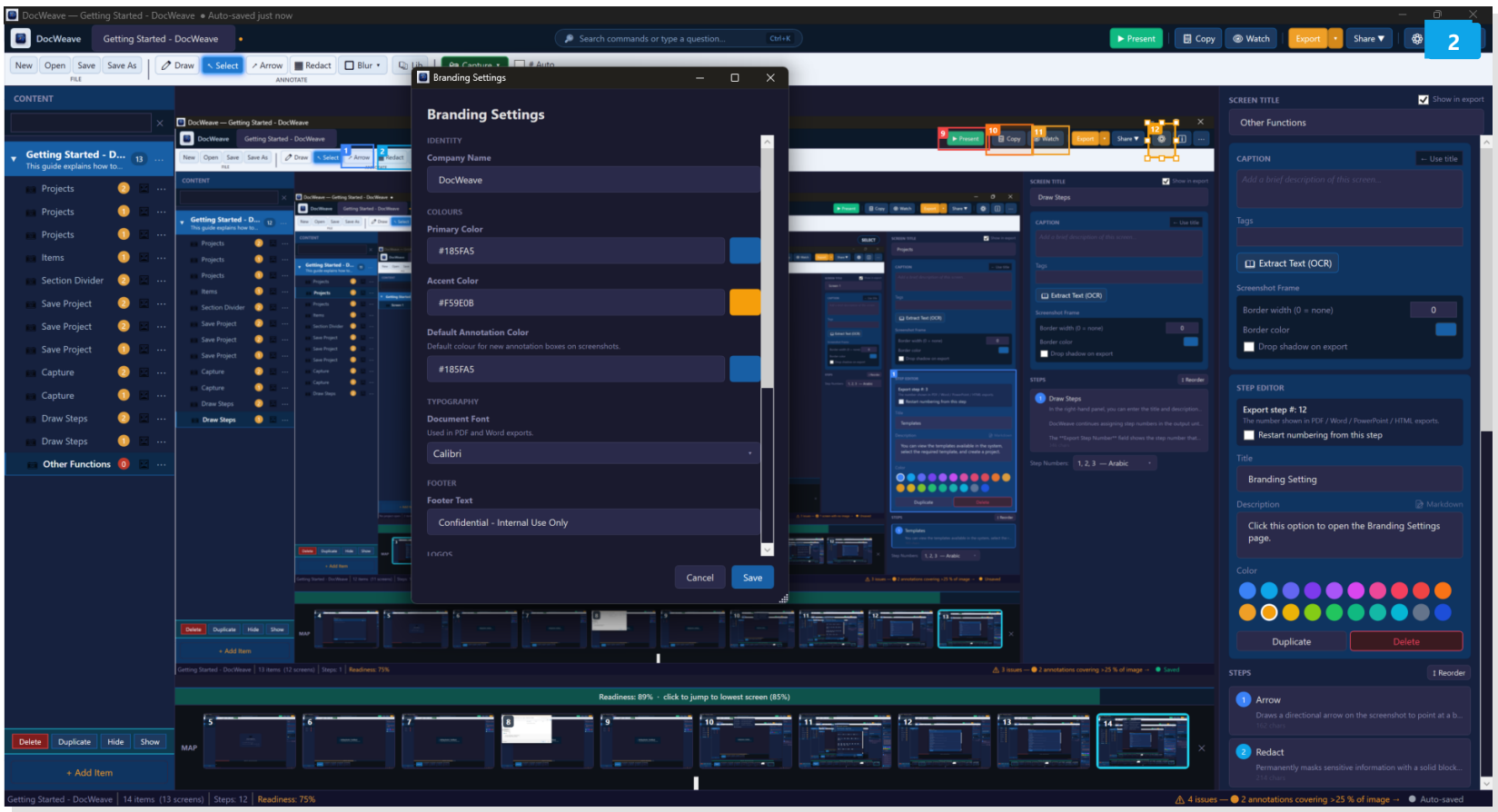




2

STEP 14
Project Info

Project information can be managed from the Project Info section.



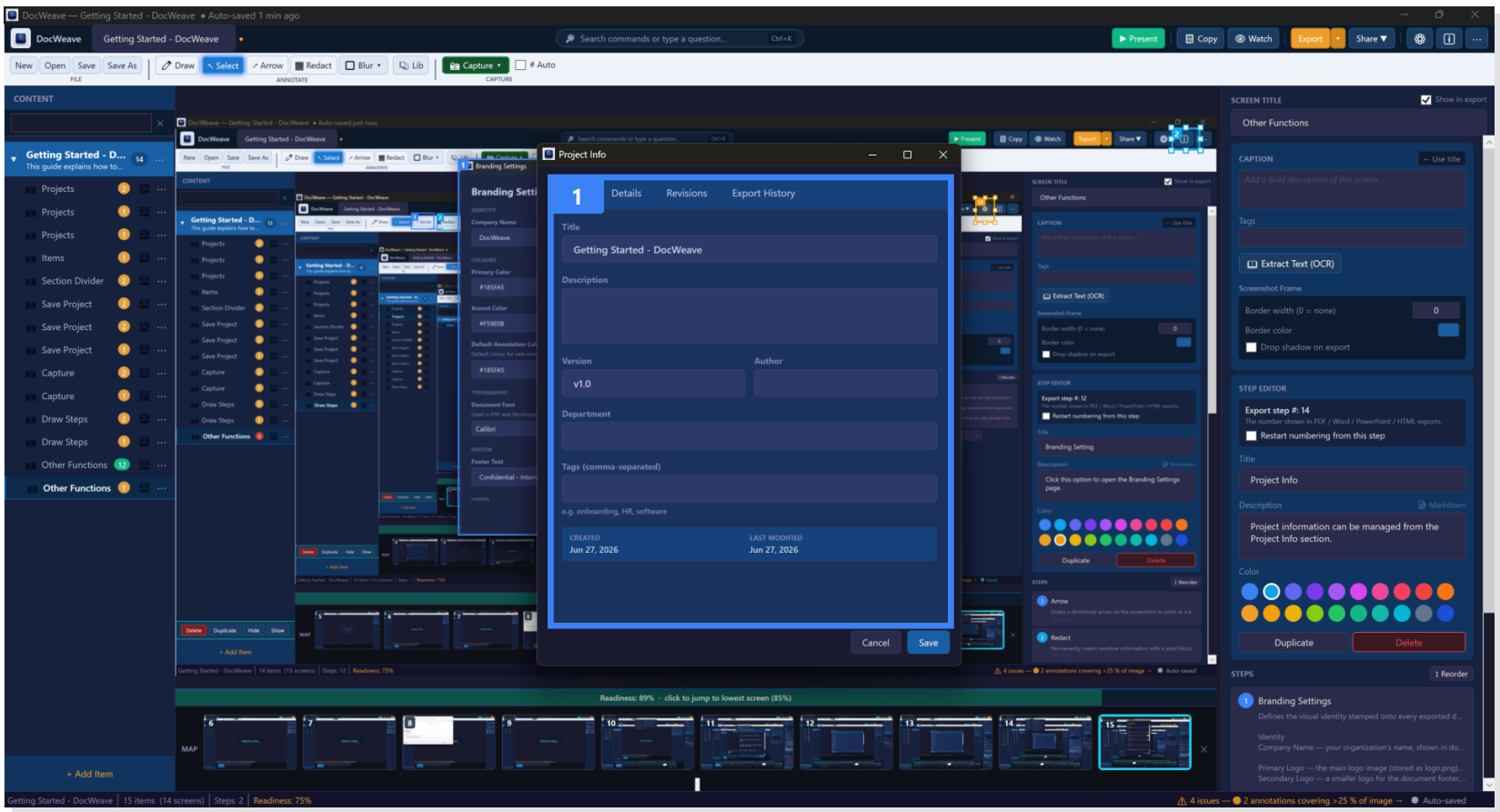


1

STEP 1
Info

The essentials. Name your project and capture the basics that appear on the cover and in exports.

- Title & Description — what this document is and what it covers
- Version & Author — current revision and who's responsible
- Department & Tags — organize and find it later
- Created / Updated — auto-tracked timestamps



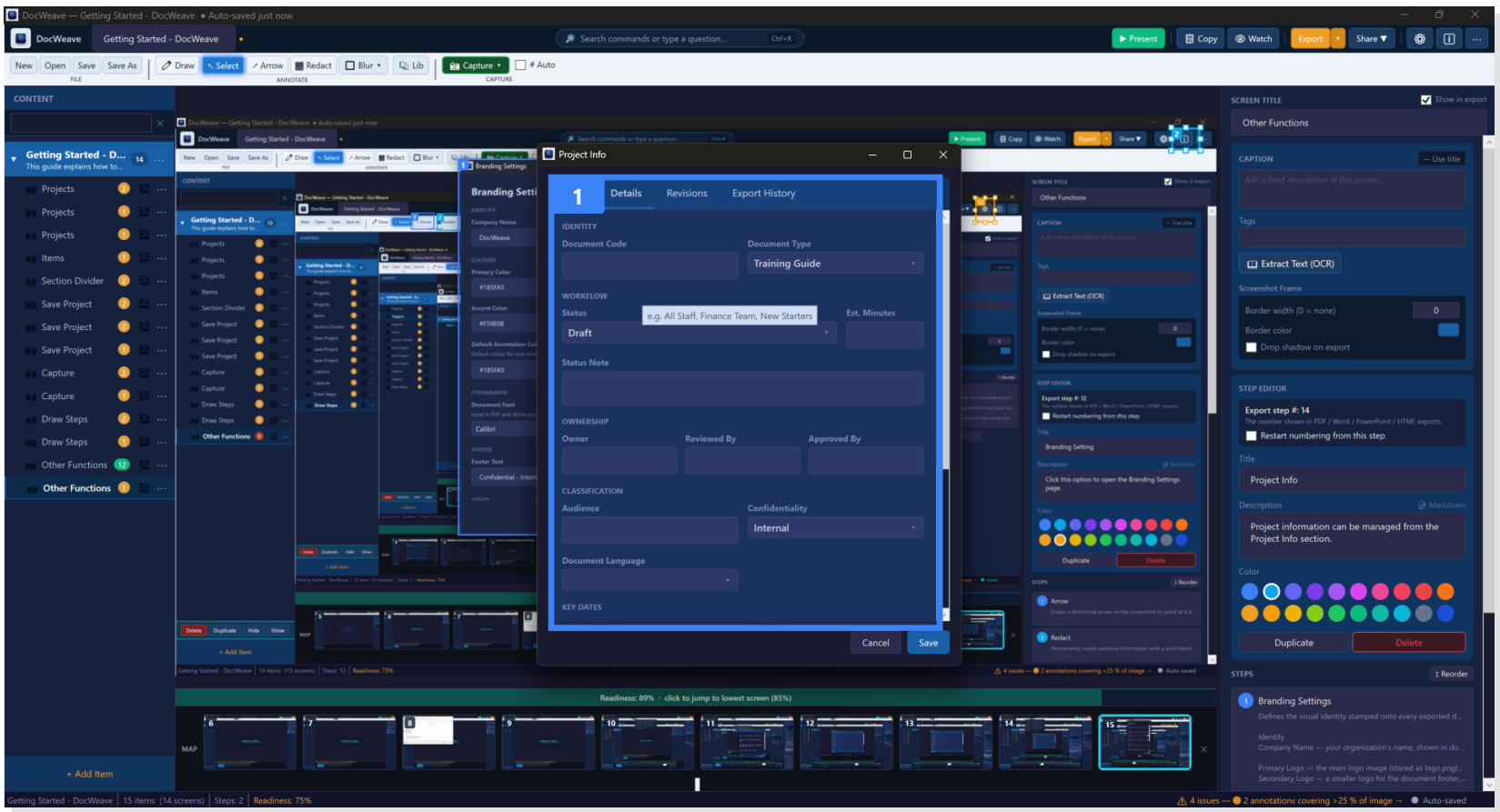


1

STEP 2
Details

Governance & approval. Everything needed to make this a controlled document.

Document code, type, status & estimated time — classify and track the doc
Owner, Reviewed by, Approved by — the accountability chain
Audience, Confidentiality, Language — who it's for and how it's handled
Next review & Go-live dates — keep it current
Submit for Review / Approve / Recall — drive the approval workflow



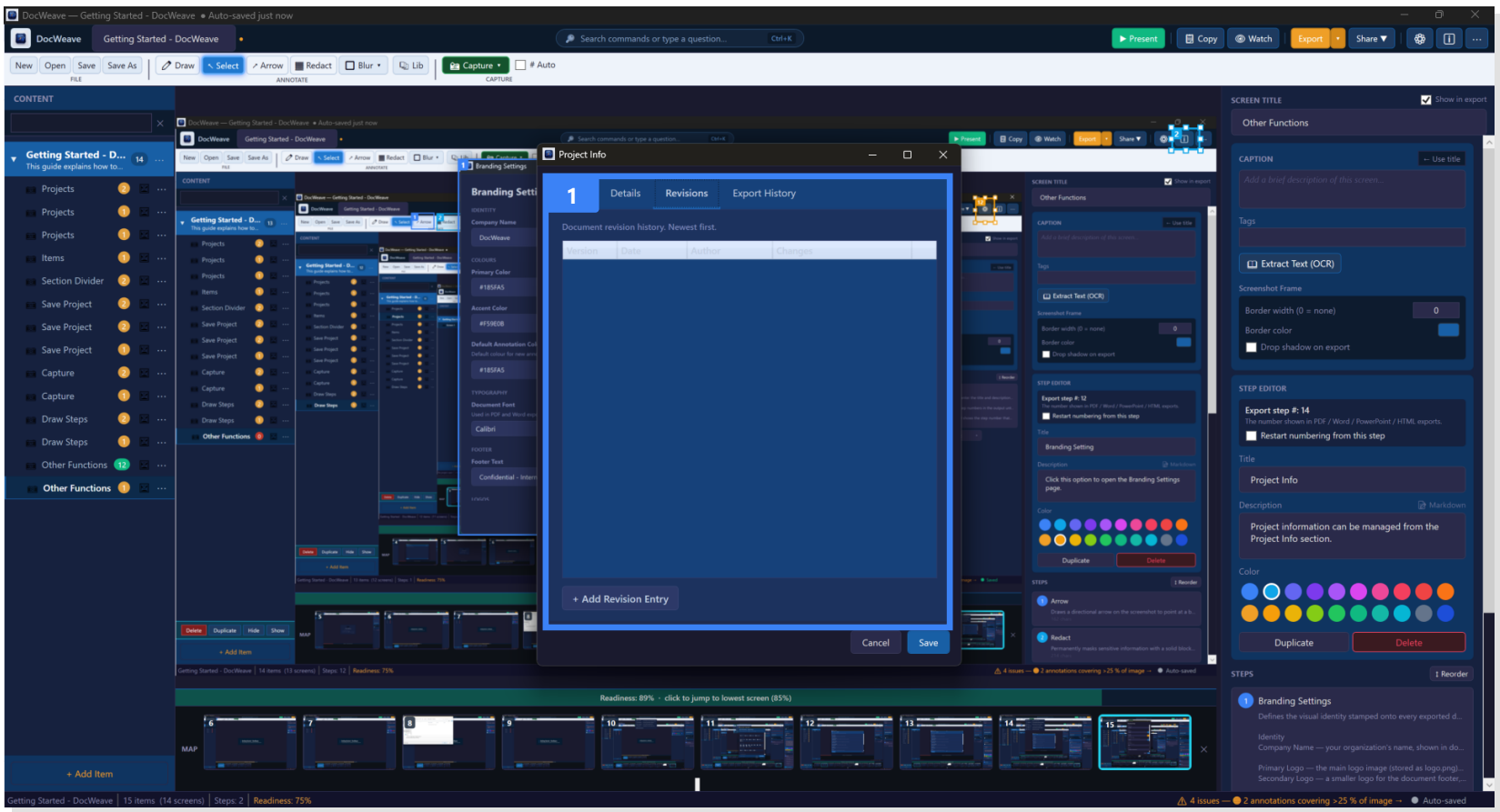


1

STEP 3
Revisions

Change history. A running log of every version, so reviewers can see what changed and when.

Version, Date, Author, Changes — one row per revision
Add an entry each time you update the document to maintain a clear audit trail.

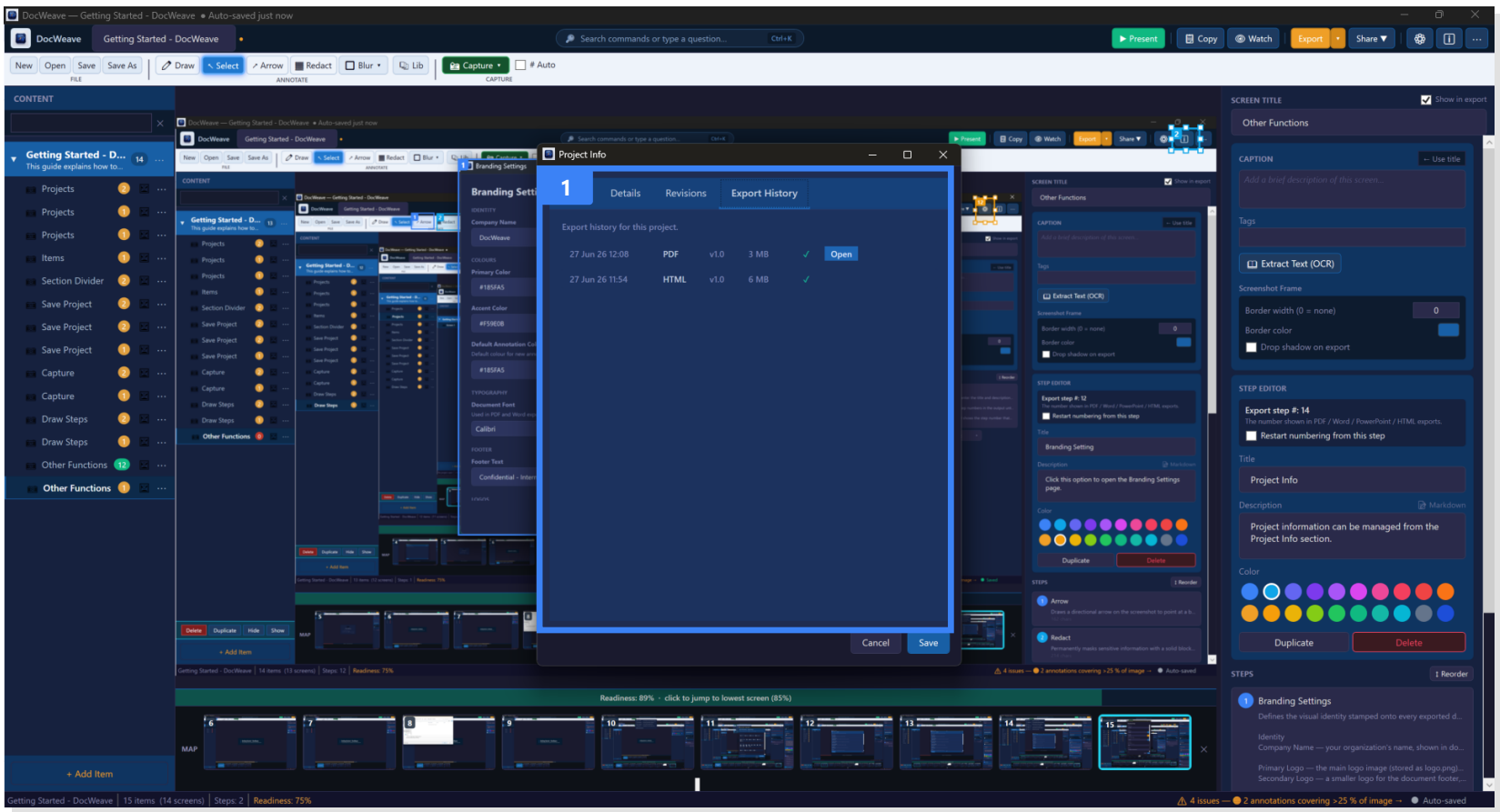




1

STEP 4
Export History

Output record. An automatic list of every export you've generated from this project — format, and when — so you always know which copy is the latest one in circulation.



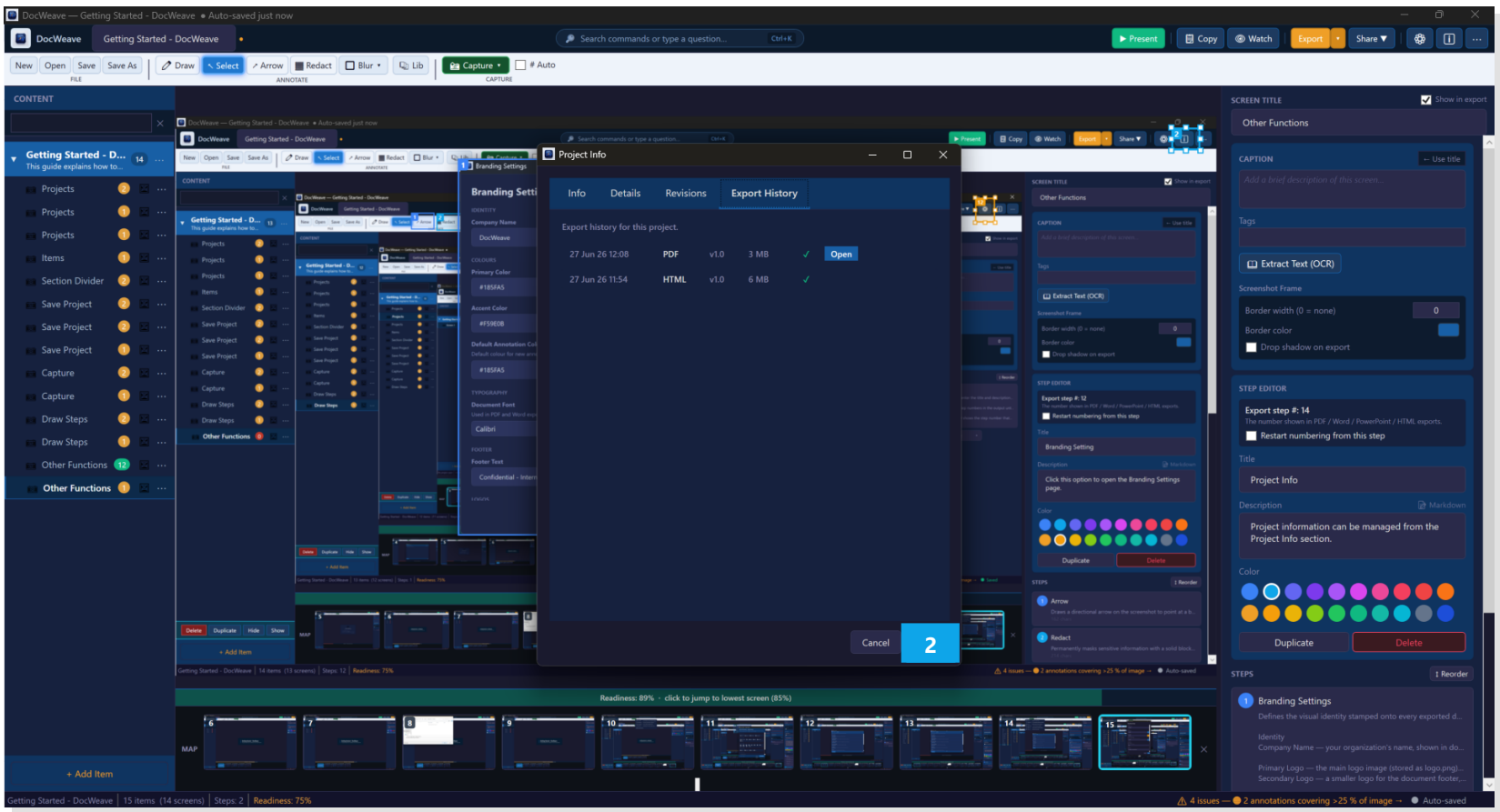


2

STEP 5

Save

Click the Save button to save the entry.

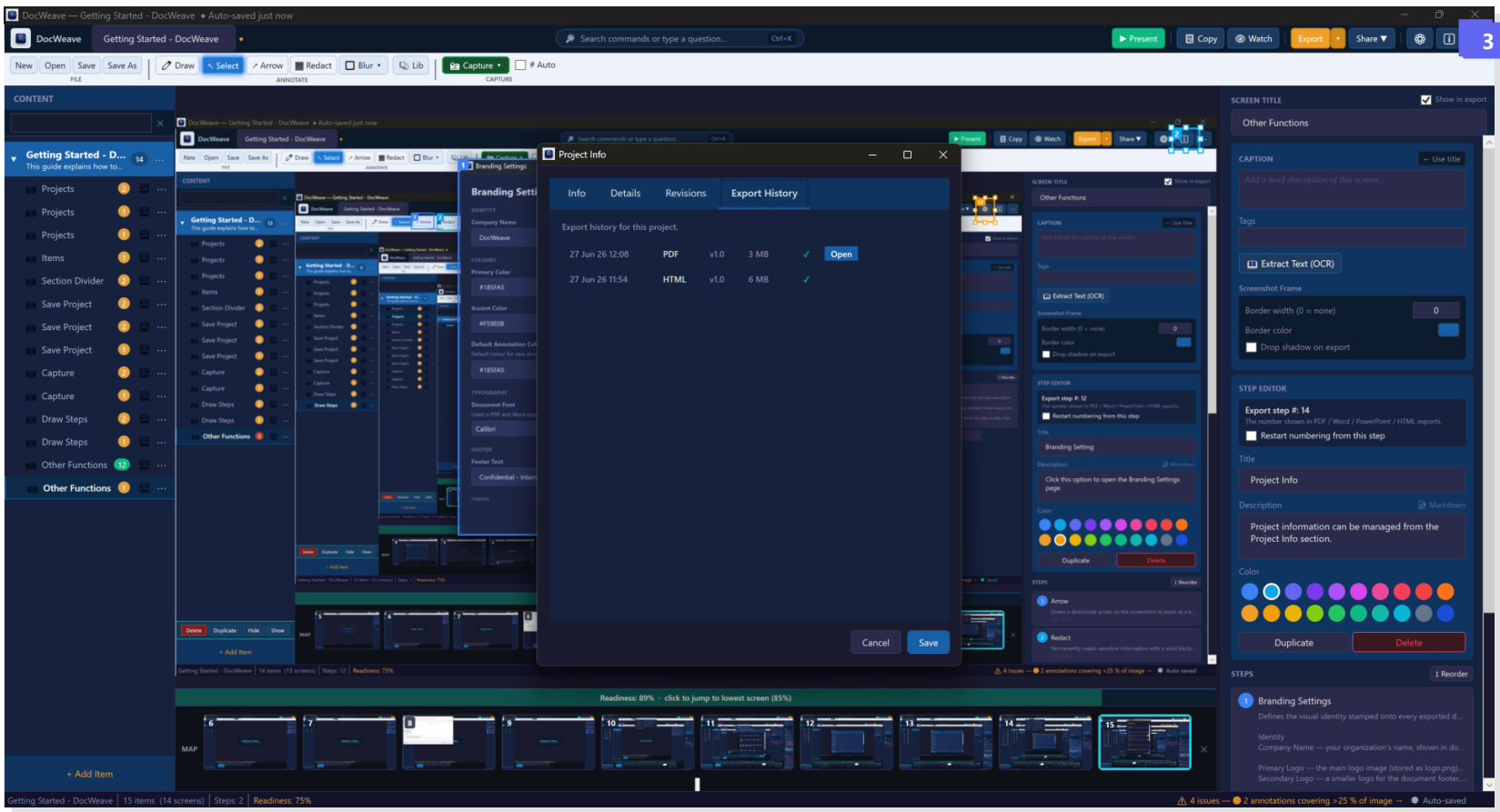




3

STEP 6
Other Options

Additional options can be opened by clicking the three-dot button.

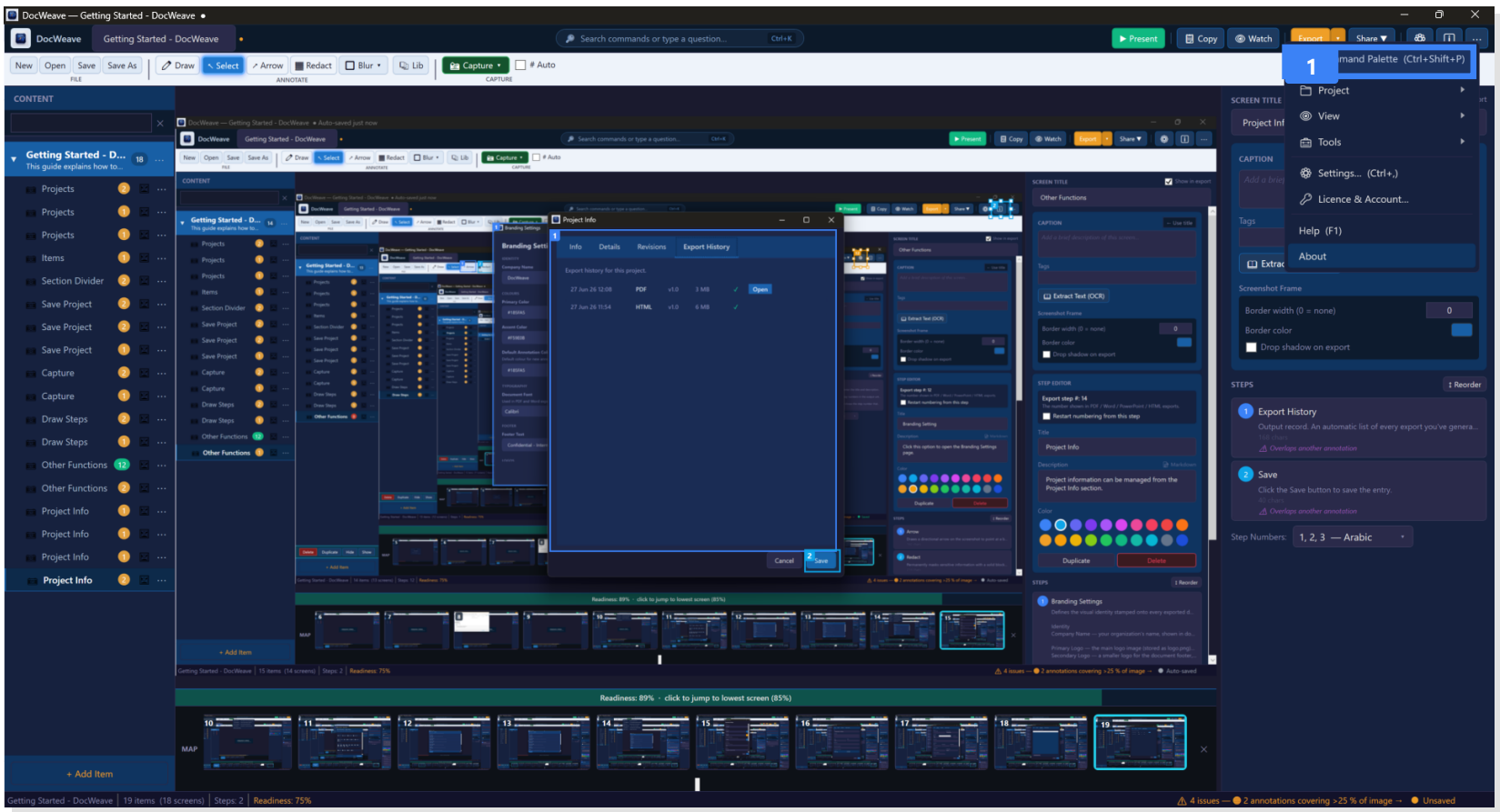




1

STEP 1
Command Palette (Ctrl+Shift+P)

Search and run any DocWeave action by name, without hunting through menus.

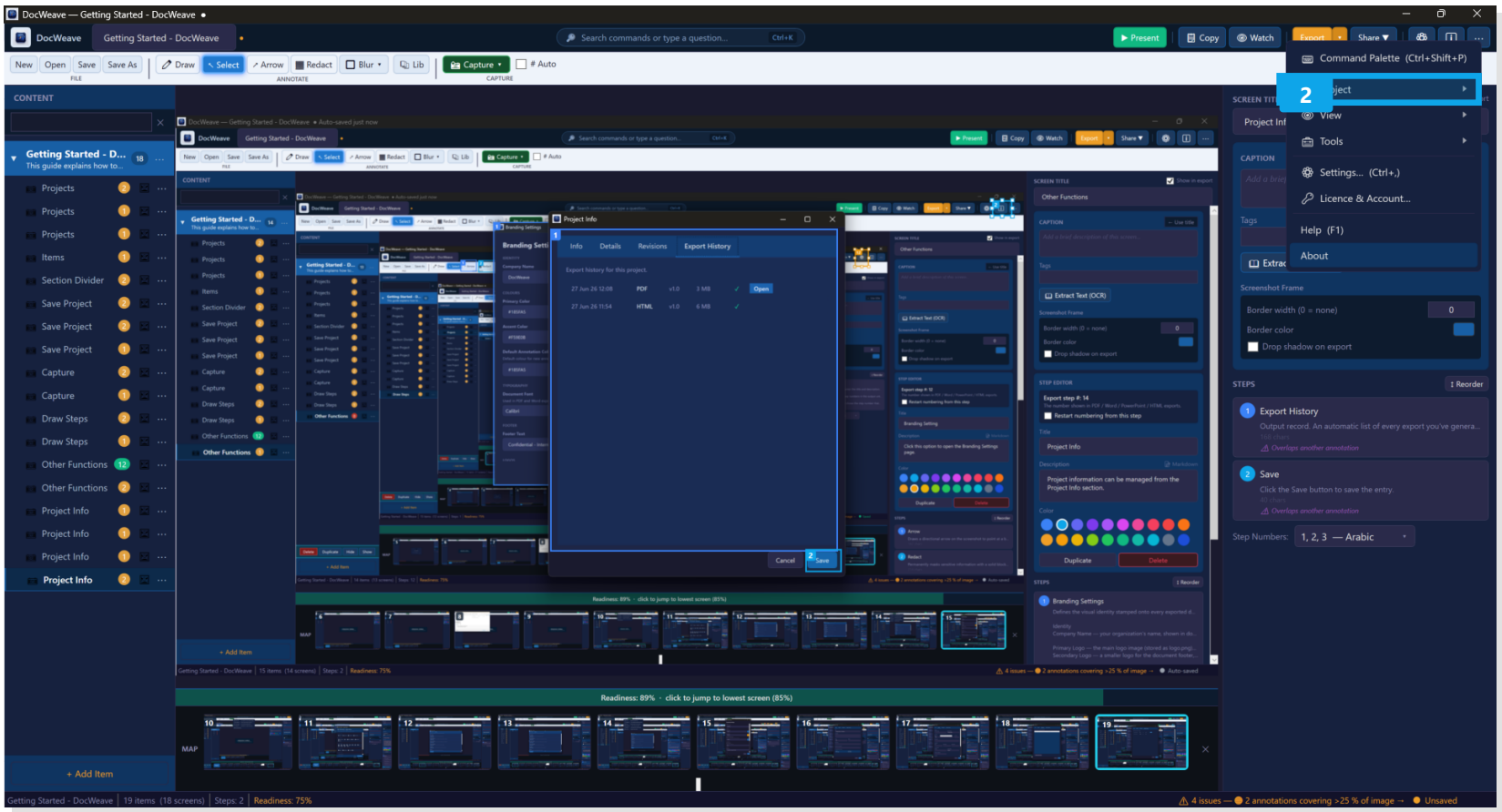




2

STEP 2
Project

Project-level actions: new, open, save, export, and project info/settings.

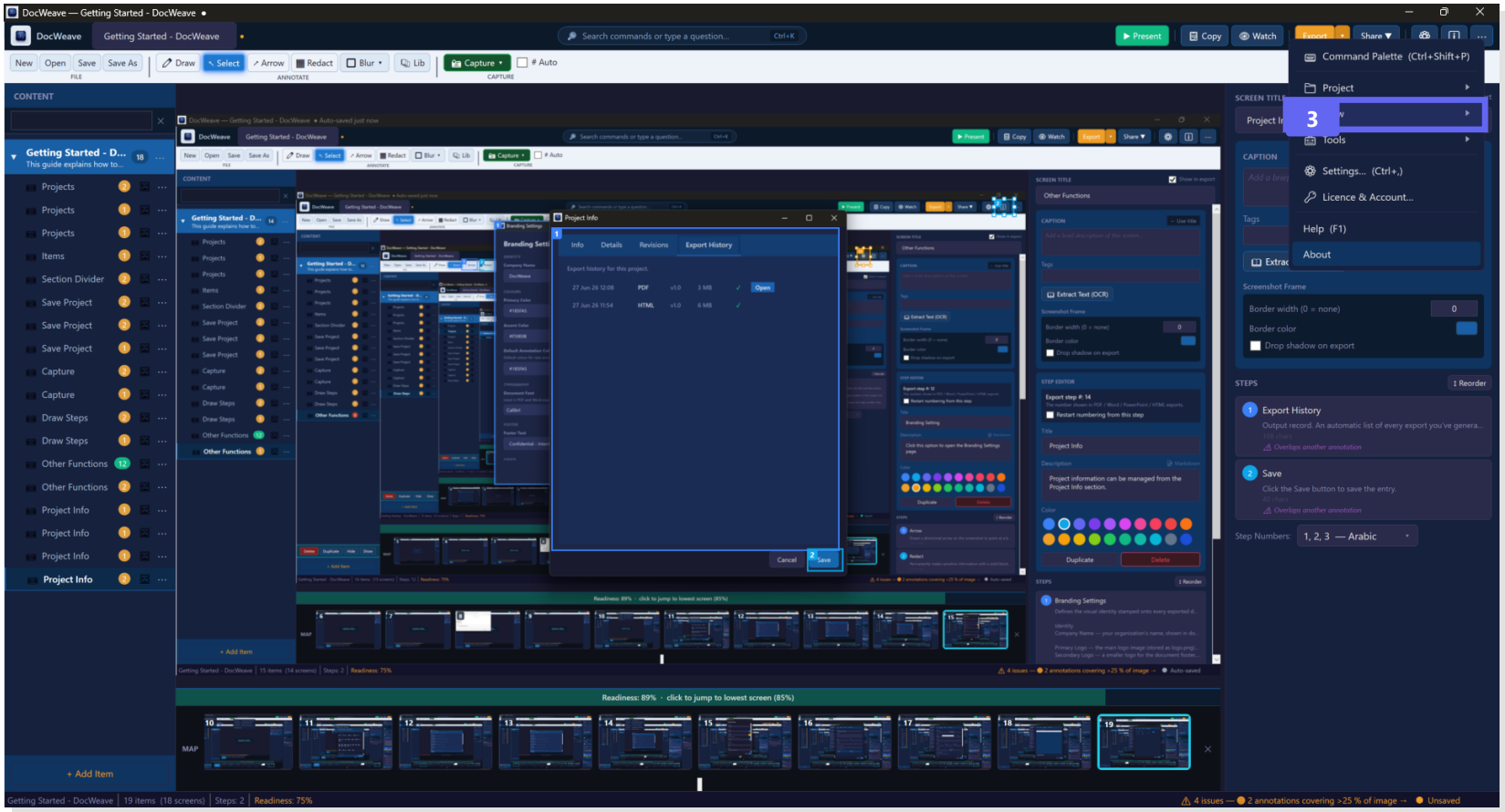




3

STEP 3
View

Toggle interface elements like the minimap, panels, themes, and layout options.

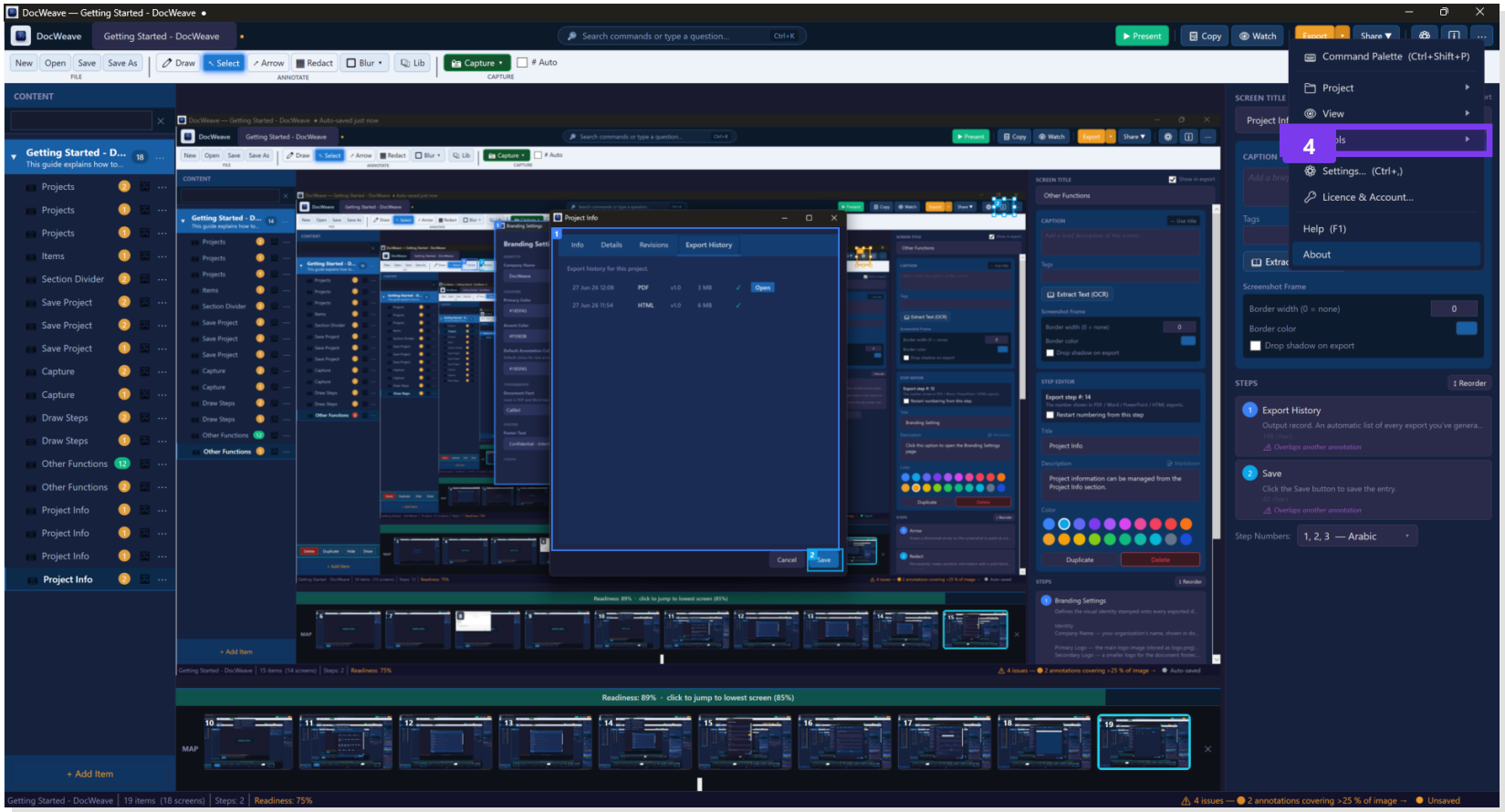




4

STEP 4
Tools

Utilities such as capture tools, find, branding, and other helpers.

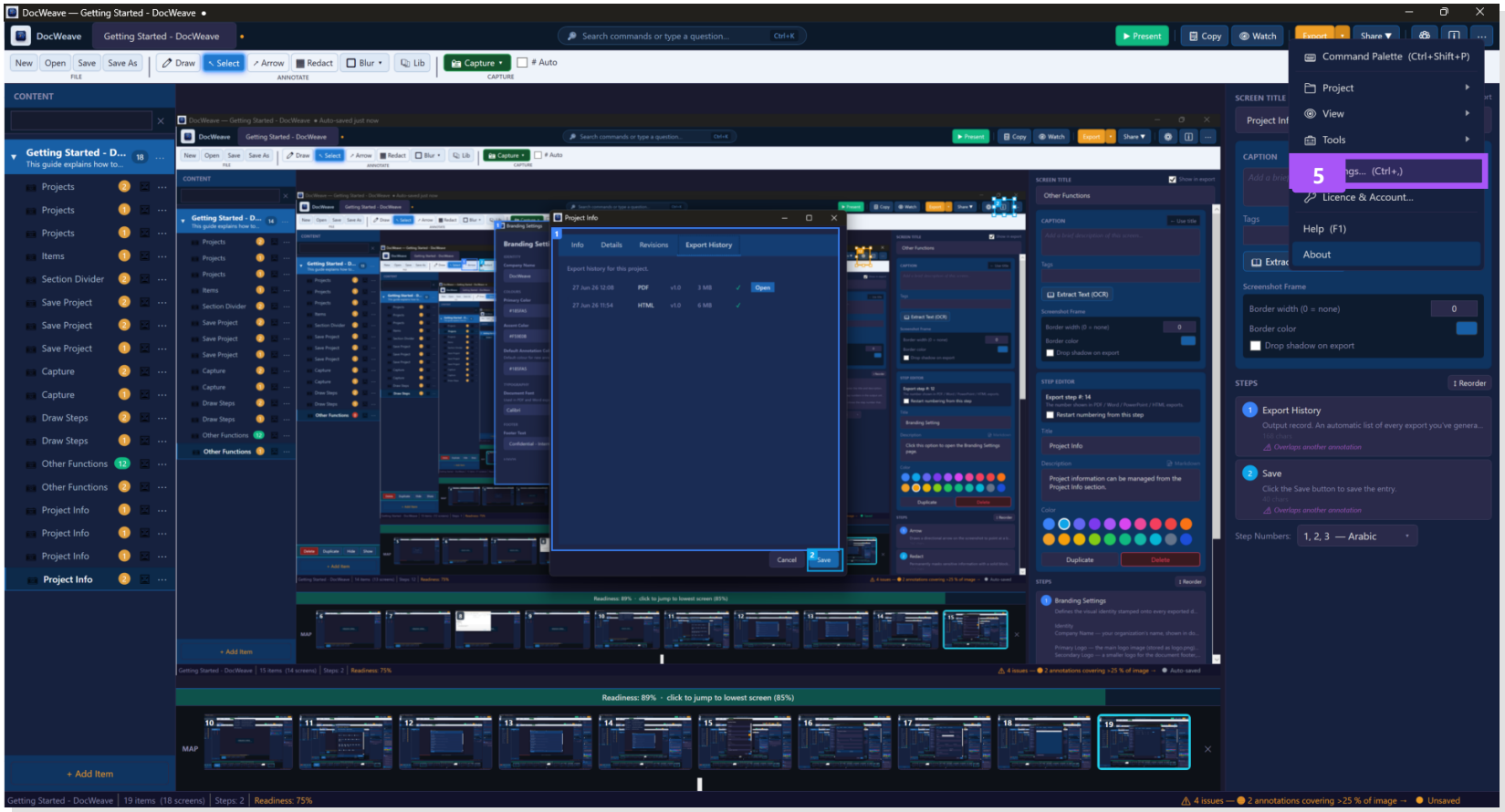




5

STEP 5
Settings (Ctrl+,)

Open app preferences — capture, export defaults, appearance, and behavior.

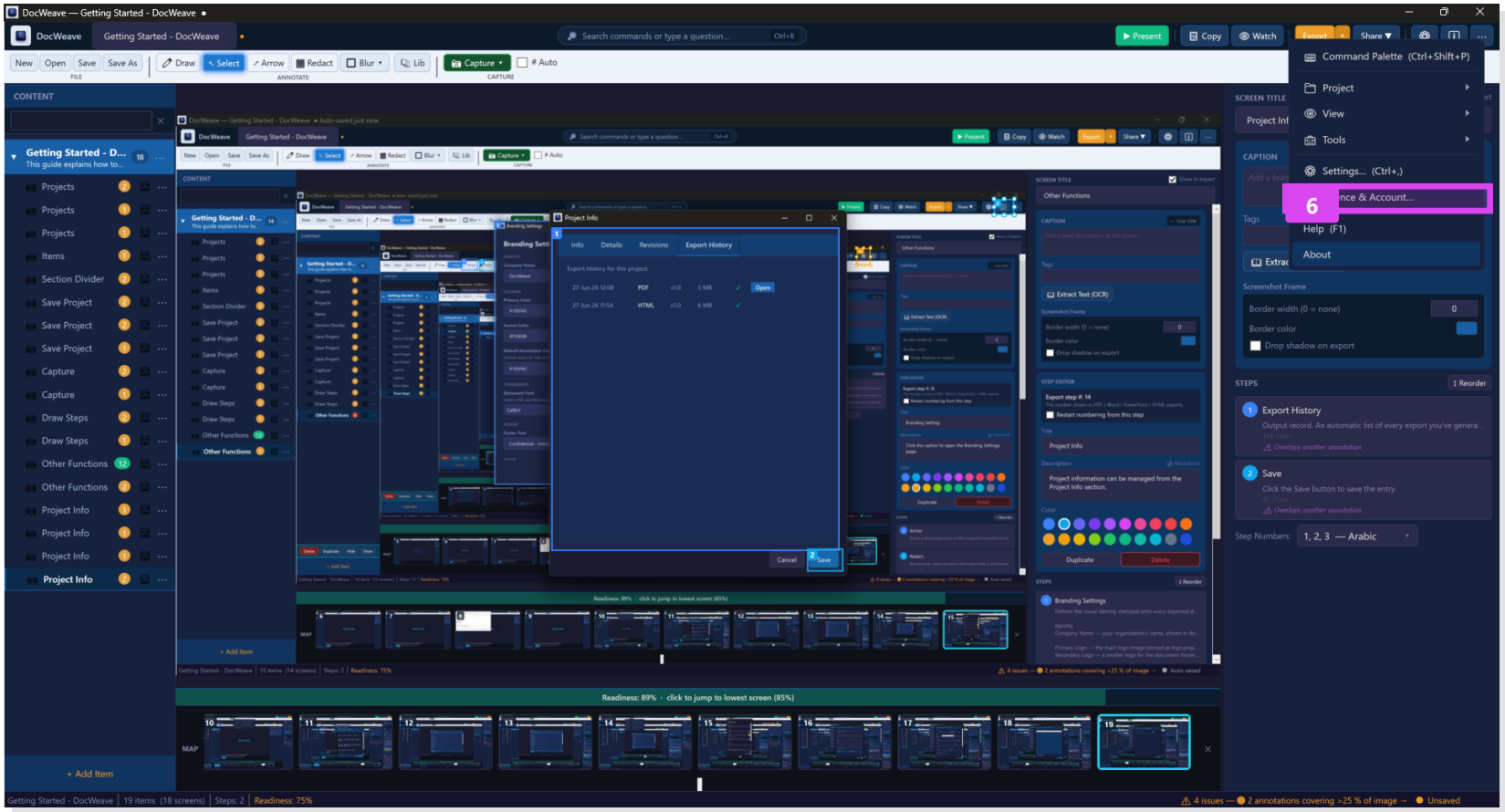




6

STEP 6
Licence & Account

Manage your licence key, activation, and account/subscription details.

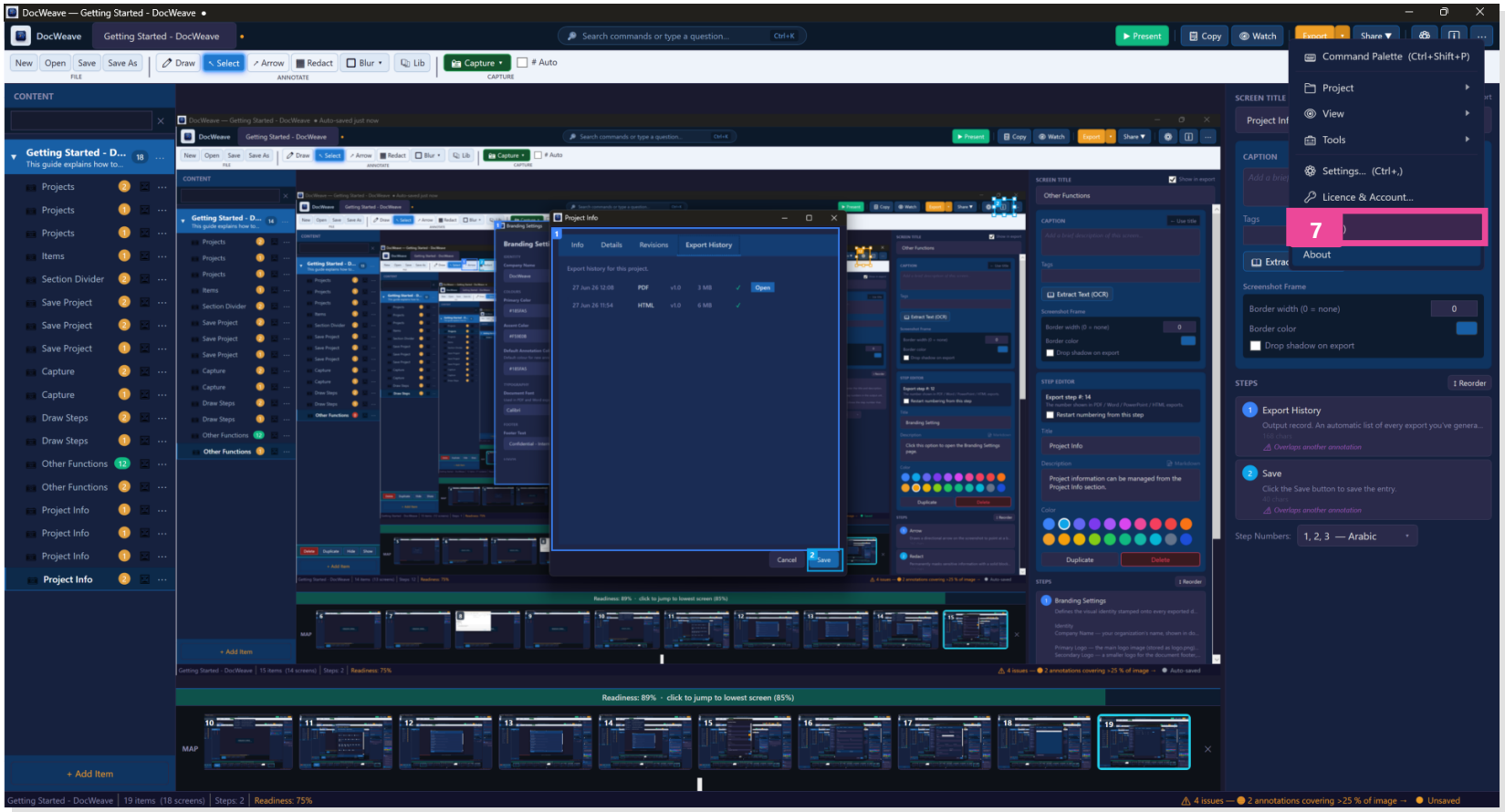




7

STEP 7
Help (F1)

Open guidance, shortcuts, and how-to documentation.

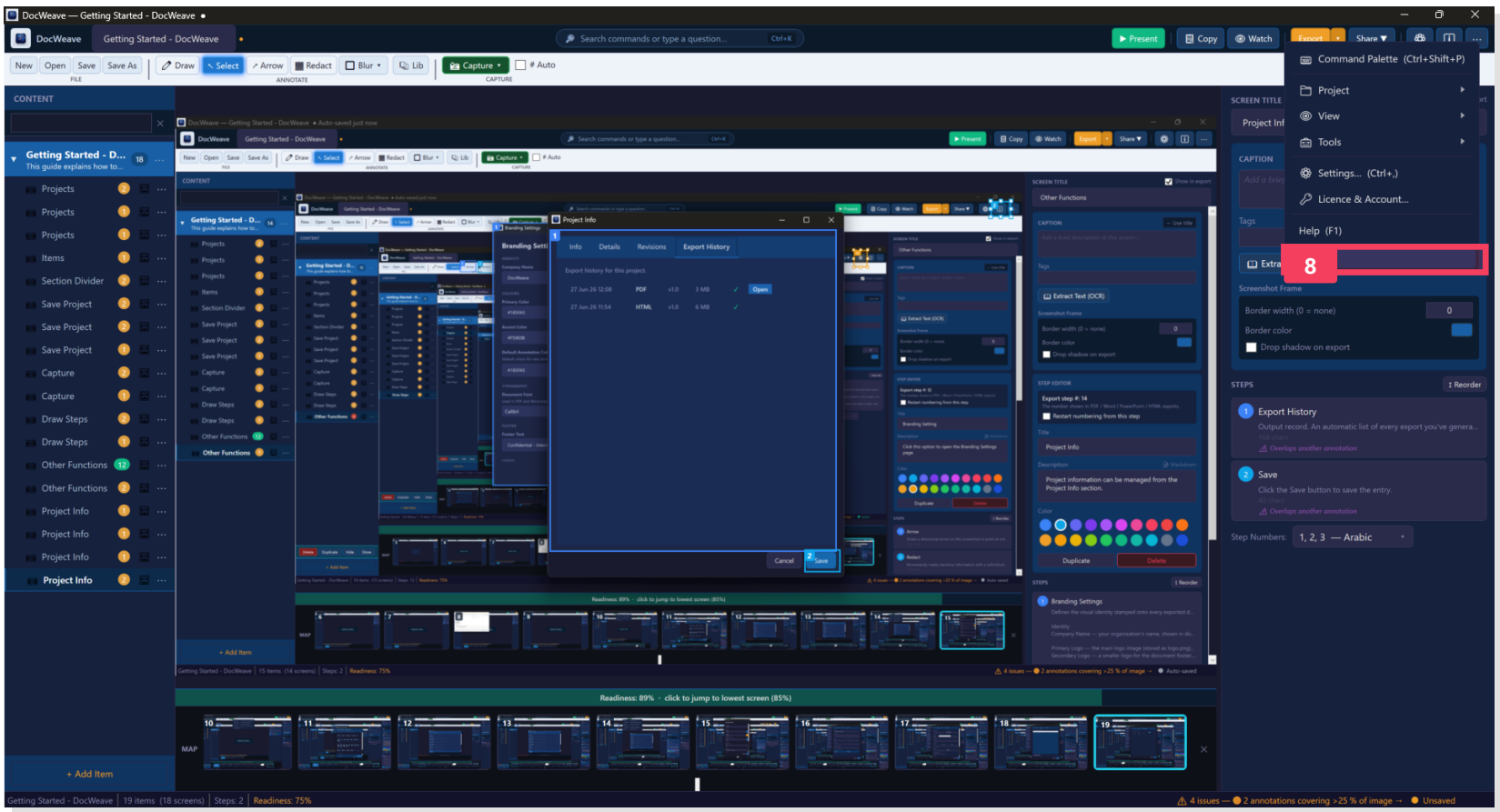




8

STEP 8
About

App version, build info, and credits.





1

STEP 9

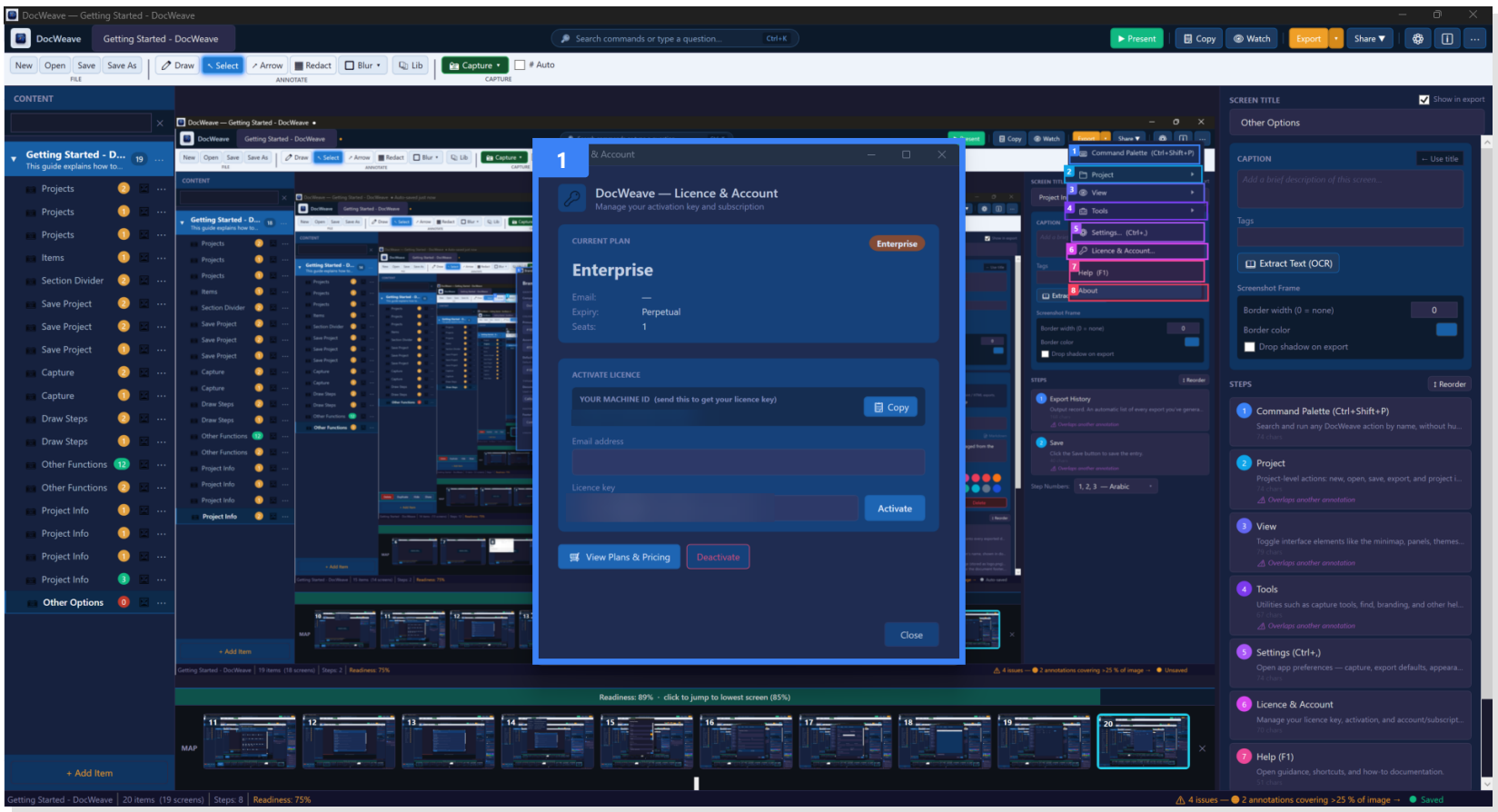
Licence & Account

Activate DocWeave Pro in 3 steps:

Step 1 — Copy your Machine ID
Click  Copy next to Your Machine ID and send it to get your licence key. Each key is locked to this machine.

Step 2 — Enter your details
Type your email address and paste your licence key into the boxes.

Step 3 — Activate
Click Activate. The status line confirms when you're on Pro.

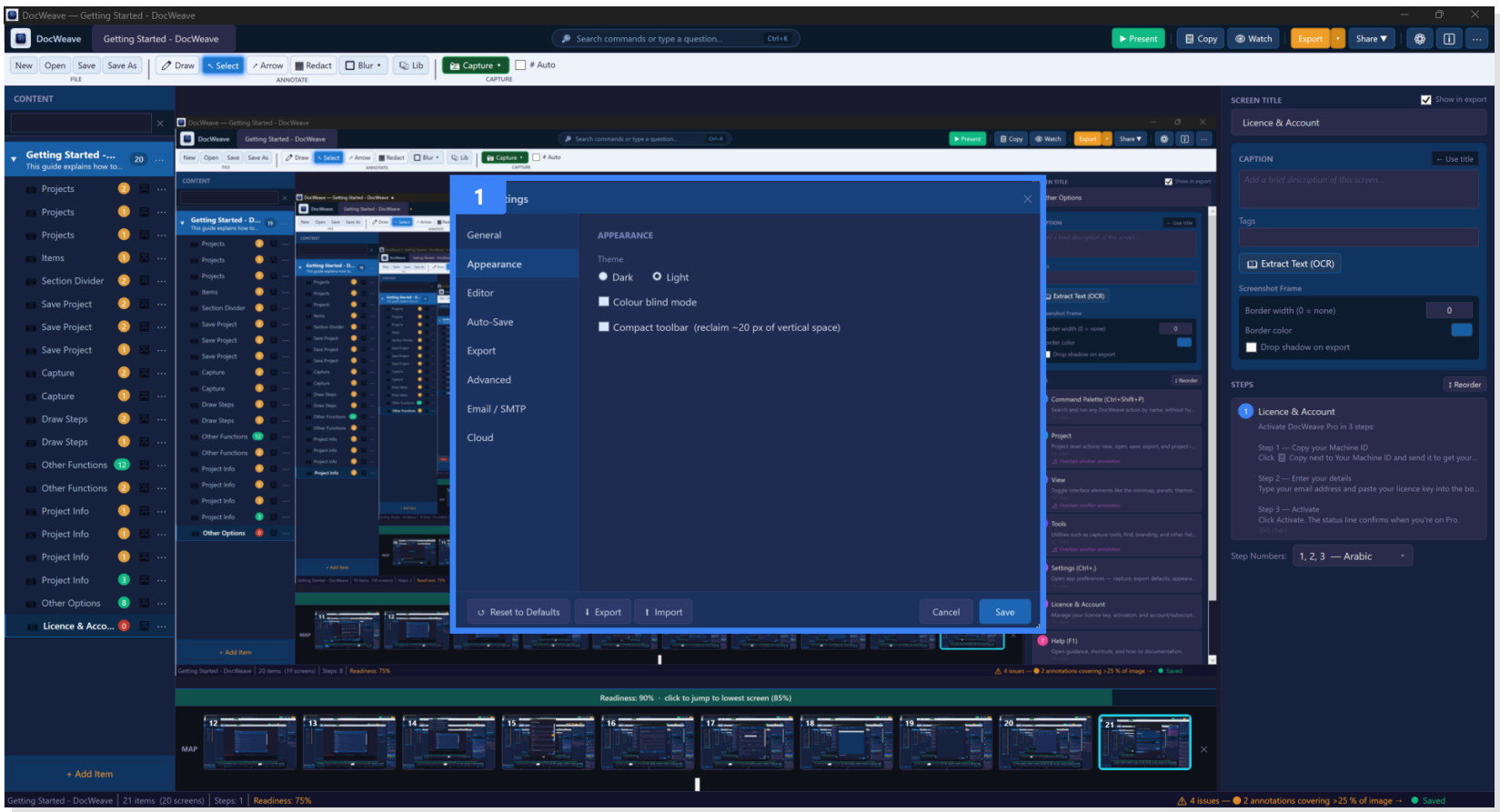




1

STEP 1
Light Theme

You can choose between the dark and light theme from Settings.



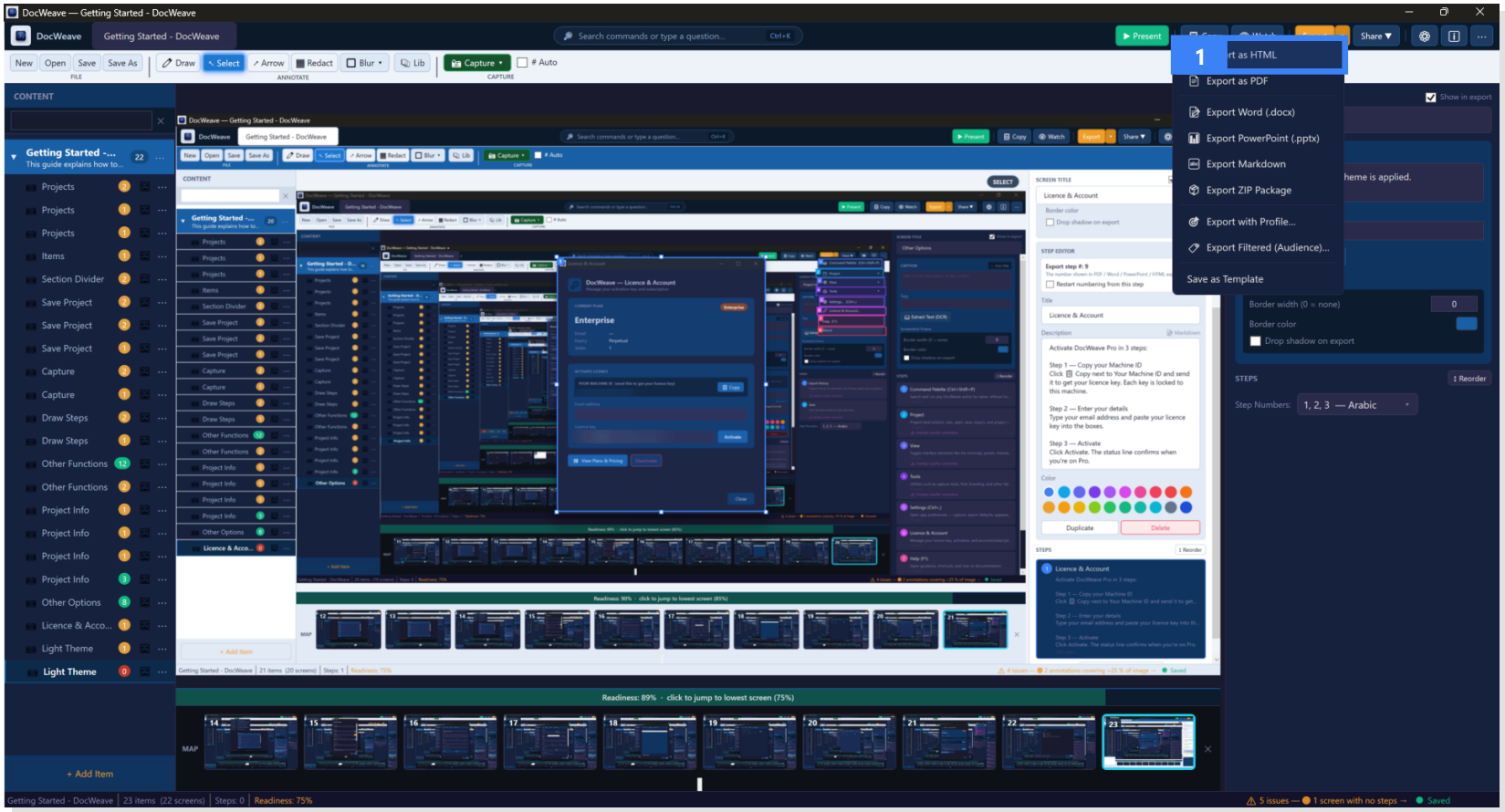
We can see the light theme is applied.



1

STEP 1
Export as HTML

A self-contained web page you can open in any browser or host online; great for interactive, shareable docs.

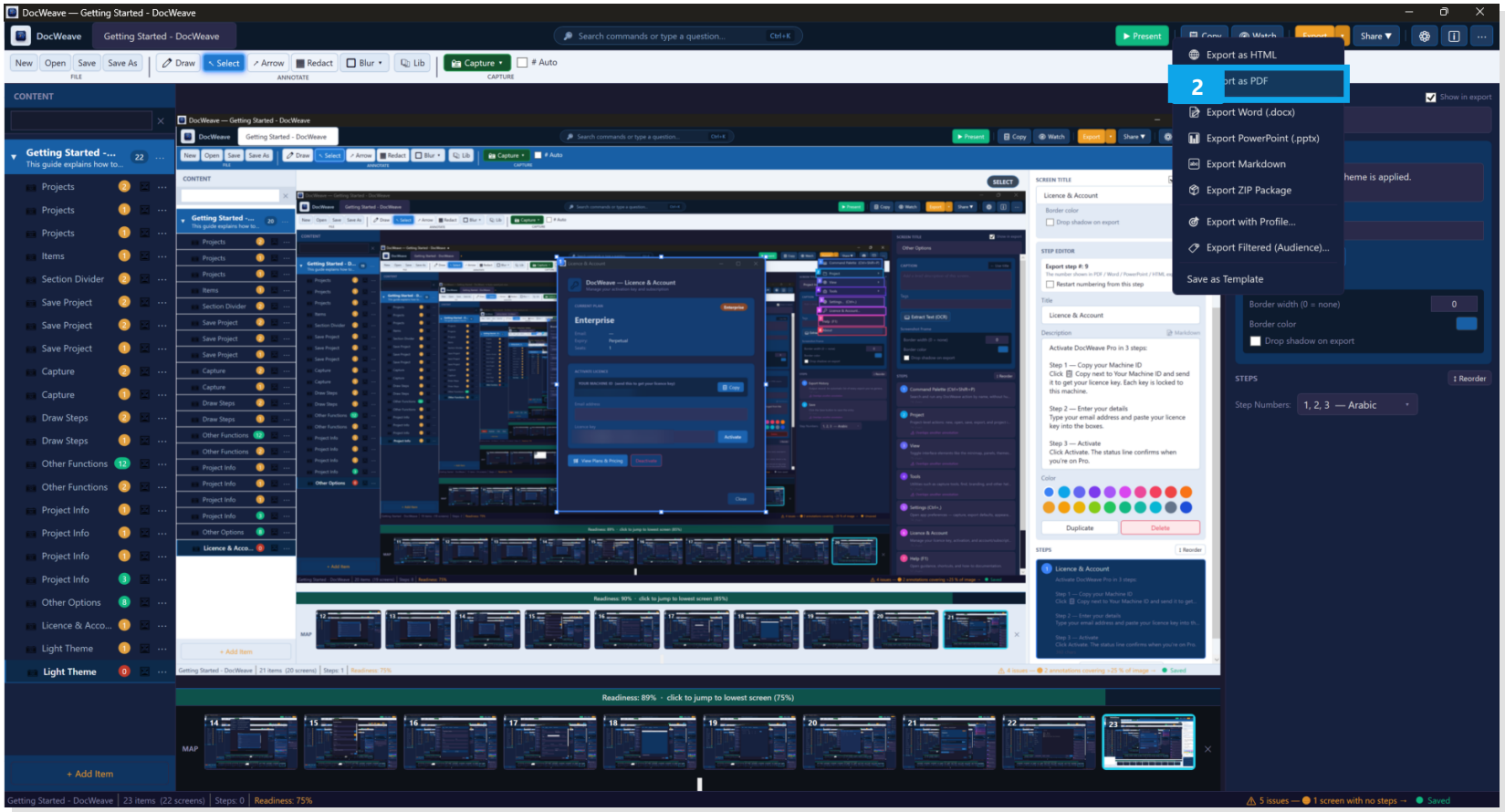




2

STEP 2
Export as PDF

A polished, print-ready document with fixed layout; the go-to for sharing and archiving.

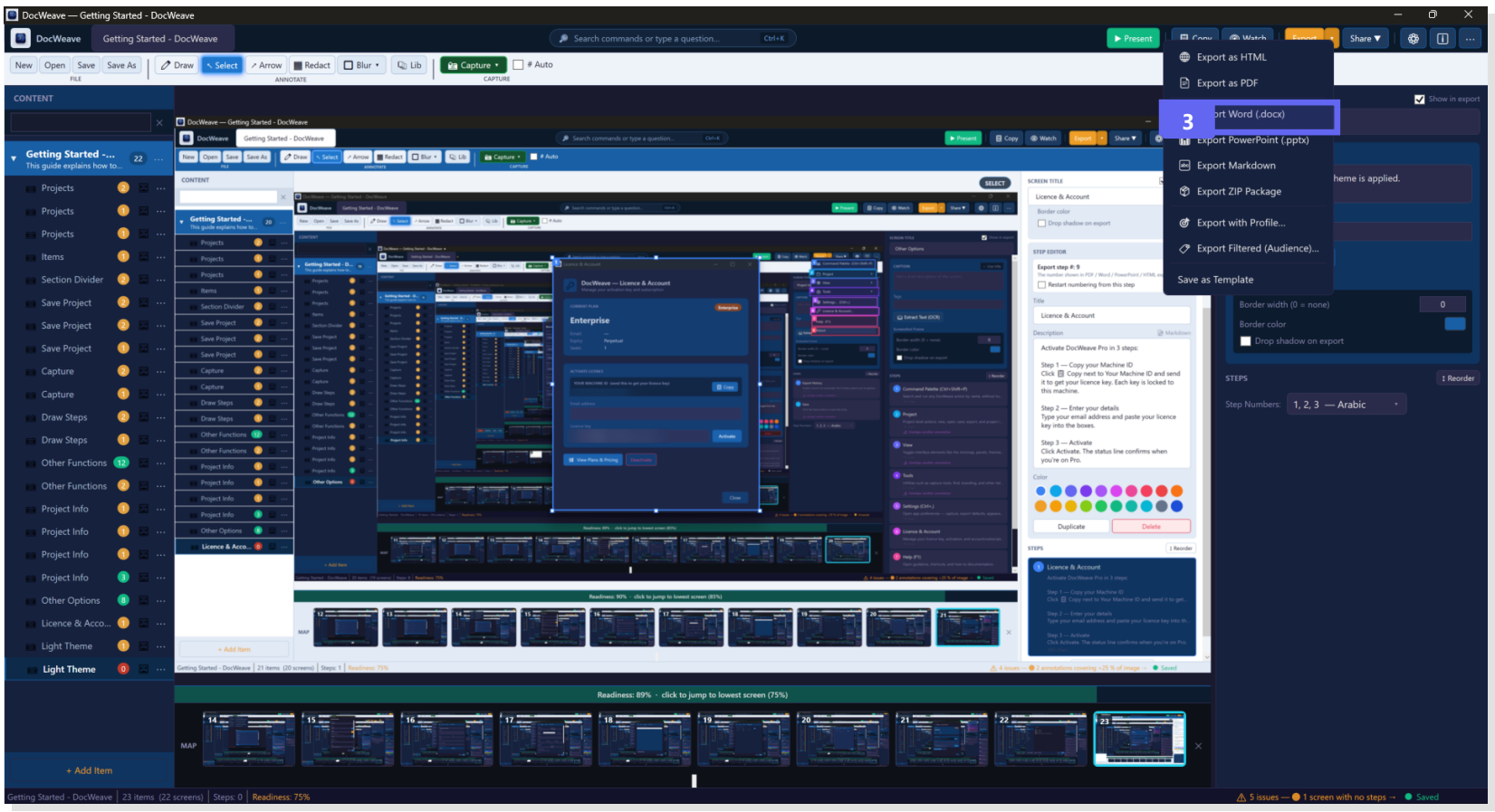




3

STEP 3
Export Word (.docx)

An editable Microsoft Word file for teams that need to add or revise content.

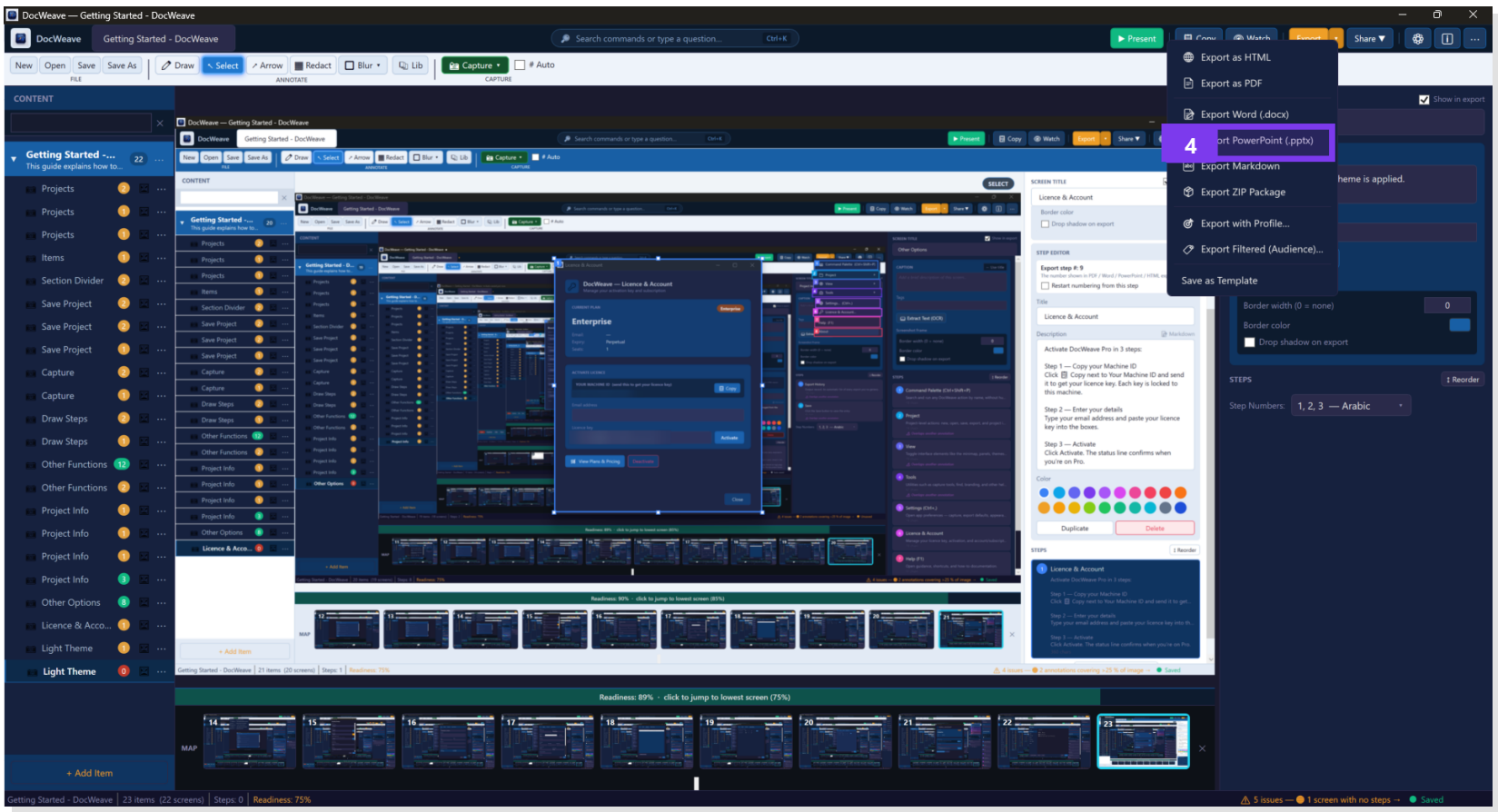




4

STEP 4
Export PowerPoint (.pptx)

A slide deck built from your screens and steps; ready for training and presentations.

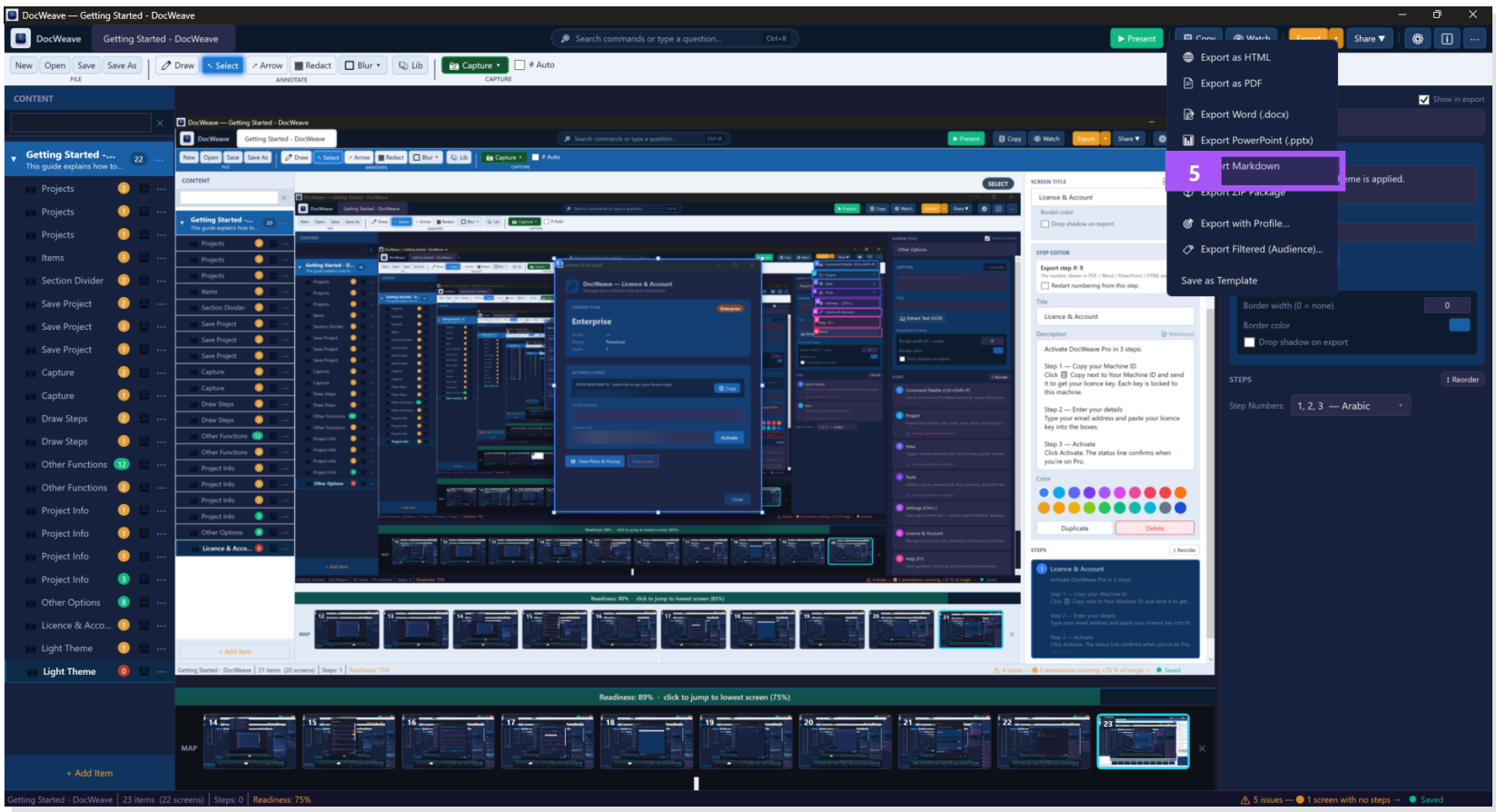




5

STEP 5
Export Markdown

Plain-text `.md`` for wikis, GitHub, or knowledge bases.

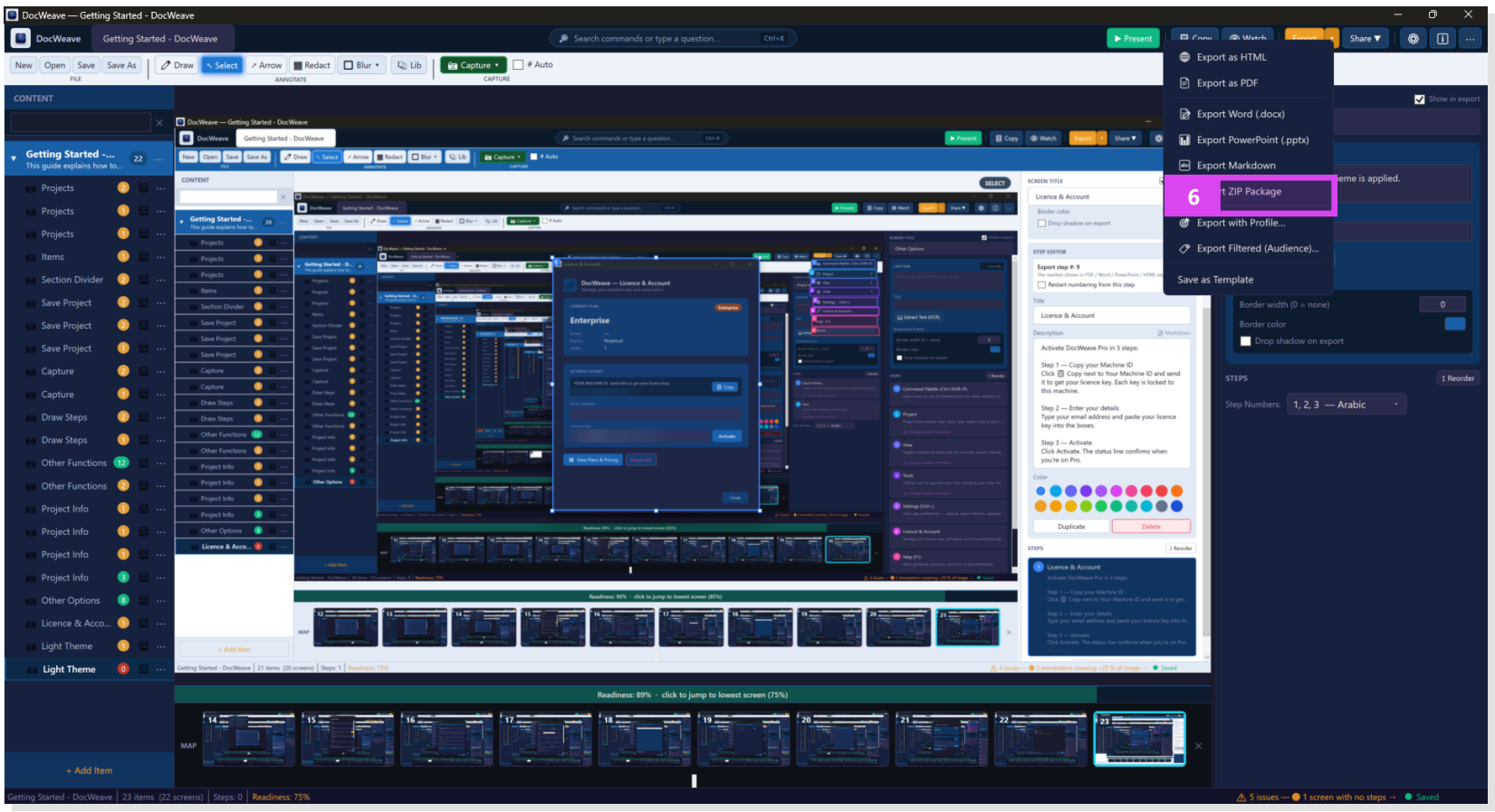




6

STEP 6
Export ZIP Package

Everything bundled — document plus image assets — in one portable archive.



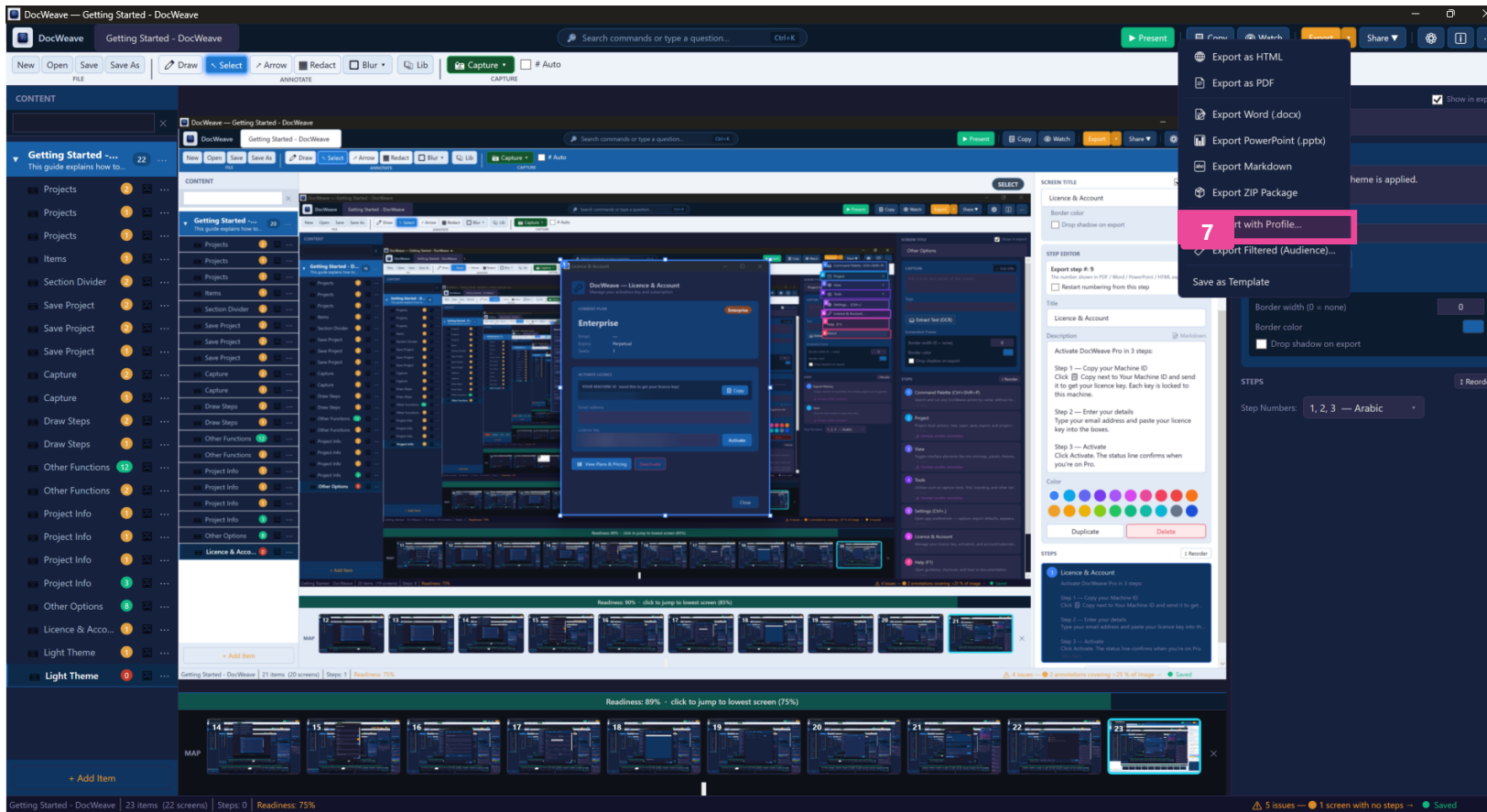


7

STEP 7

Export with Profile...

Run a saved export preset (format + settings) in one click for consistent, repeatable output.

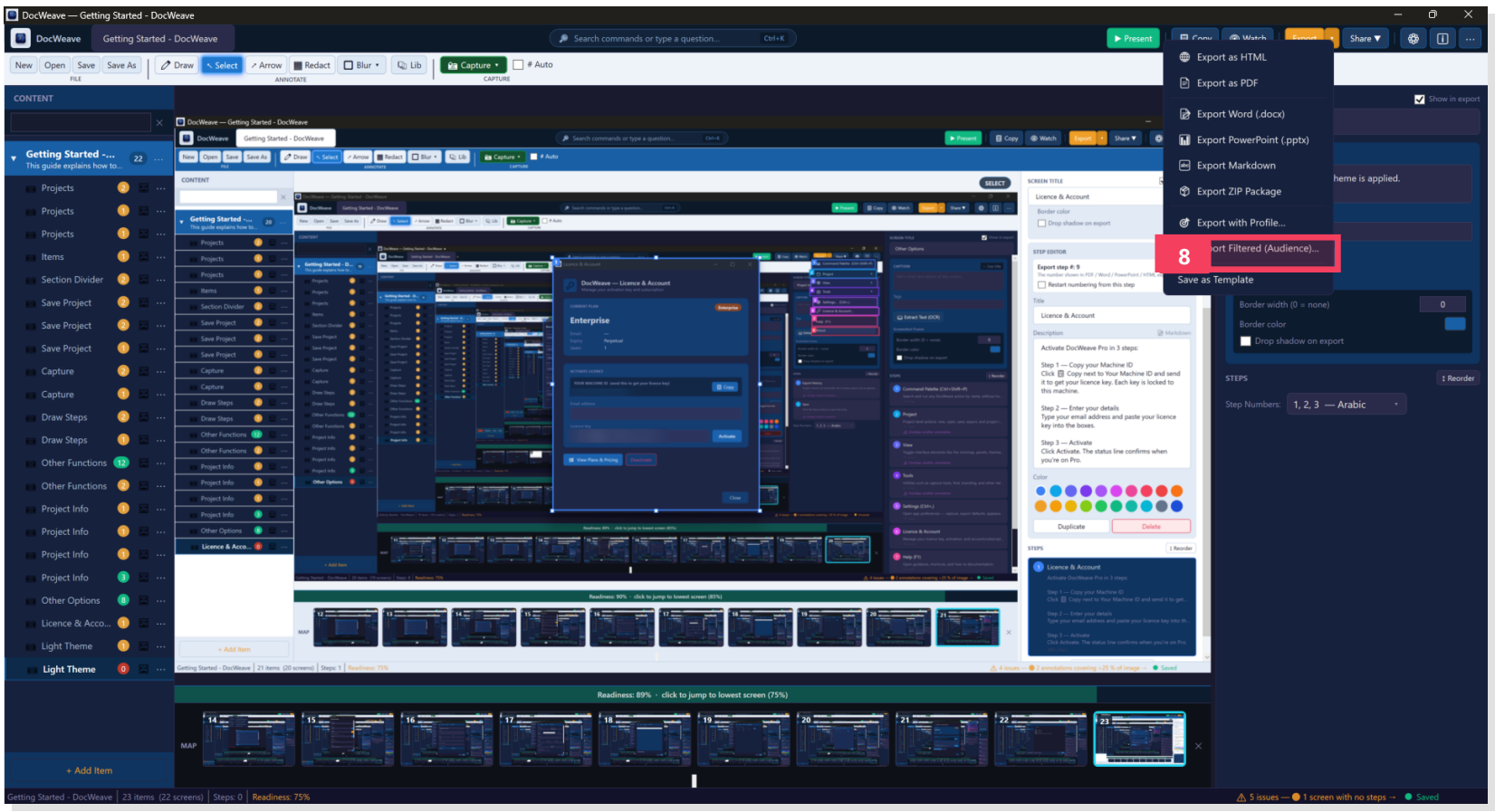




8

STEP 8
Export Filtered (Audience)..

Export only the content tagged for a chosen audience, so each role gets its own tailored version.

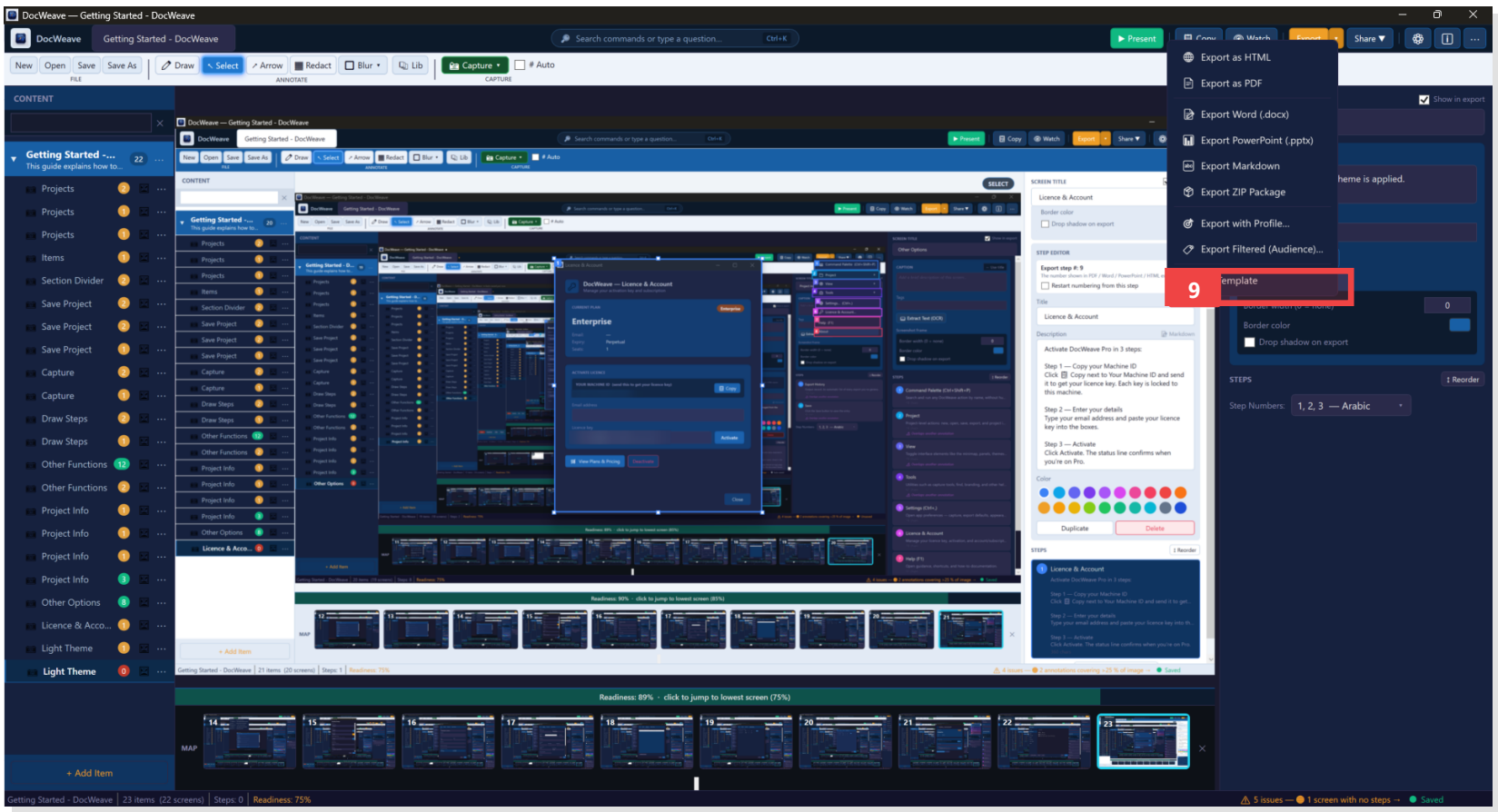




9

STEP 9
Save as Template

Save this project's structure and styling as a reusable starting point for future documents.



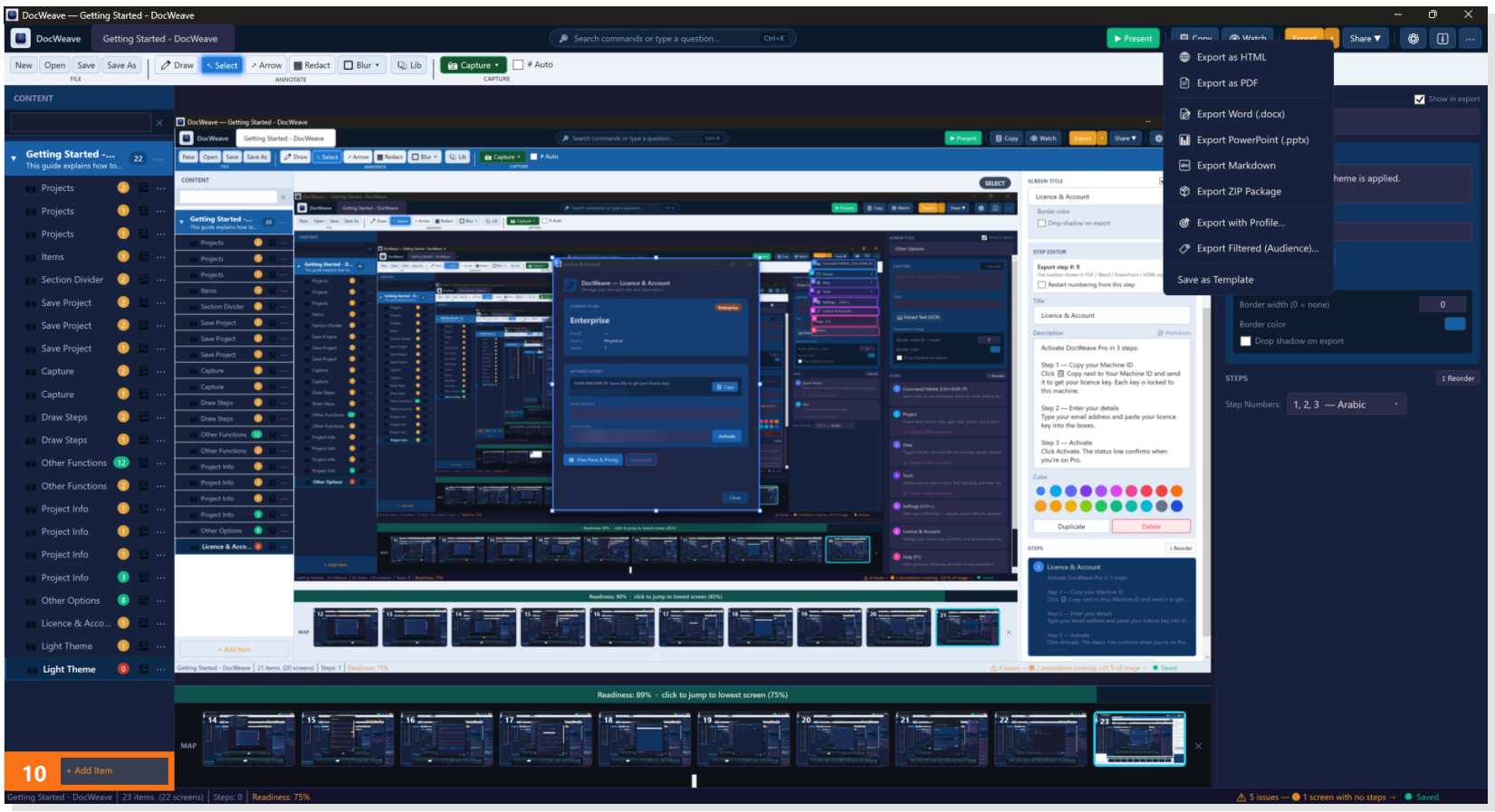


10

STEP 10

Add Item

Click the Add Item button to view the available options for adding different types of screens.

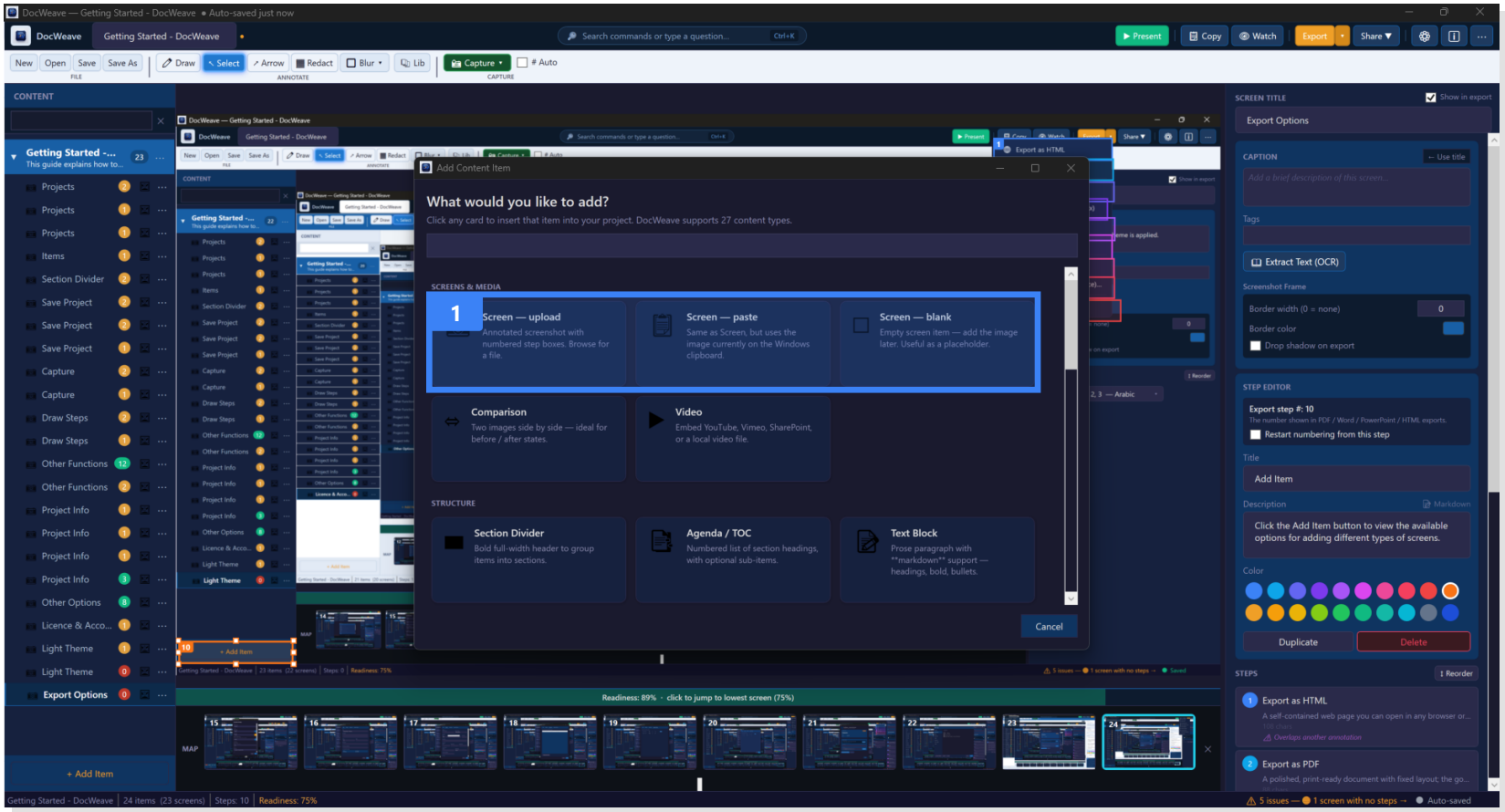




1

STEP 1
Screen

A screenshot with annotation steps; the heart of any SOP. Add via Upload File, Paste Image, or a Blank Screen to drop an image into later.

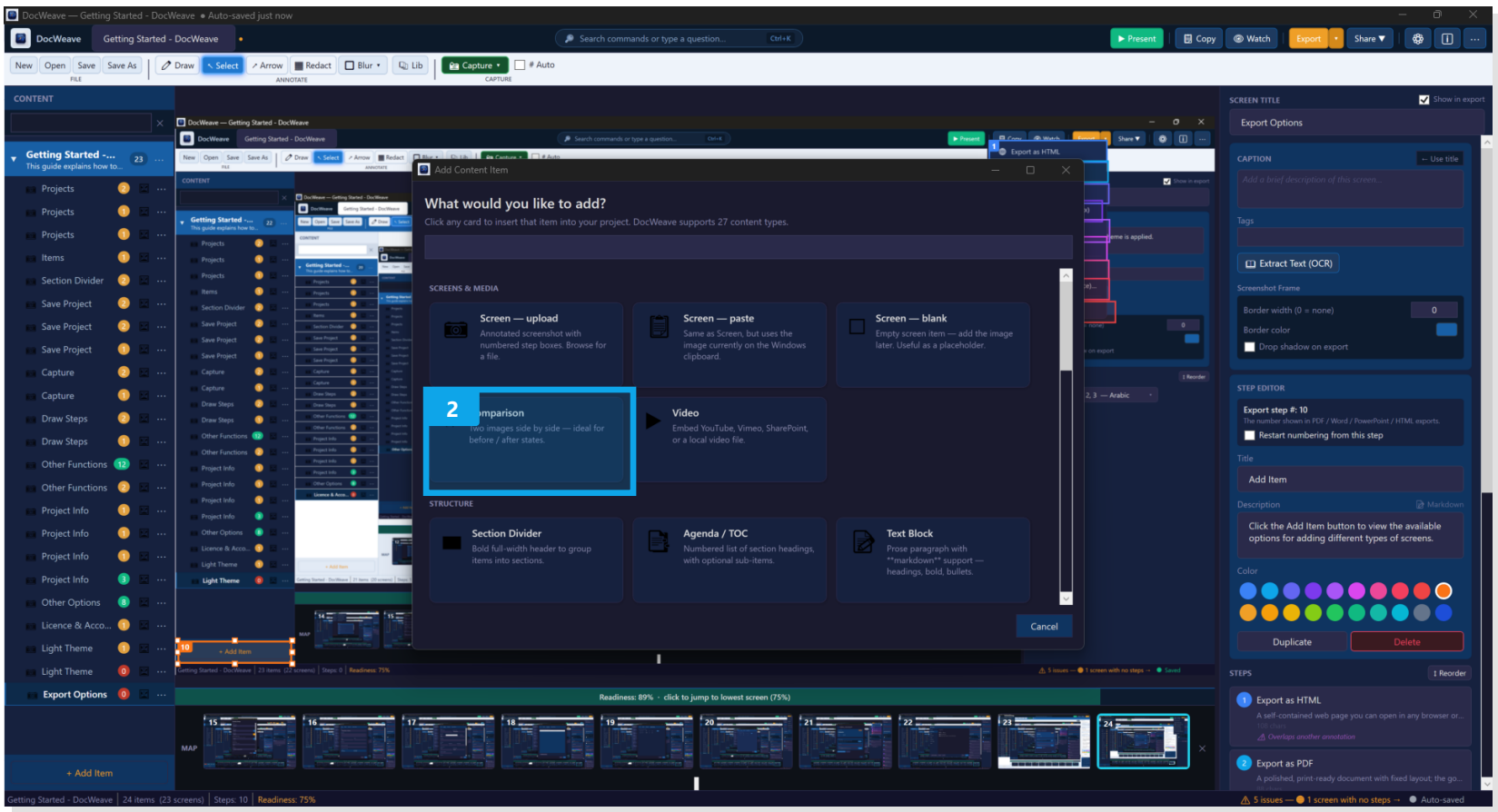




2

STEP 2
Comparison

Two images side by side for before/after or option A vs. B.

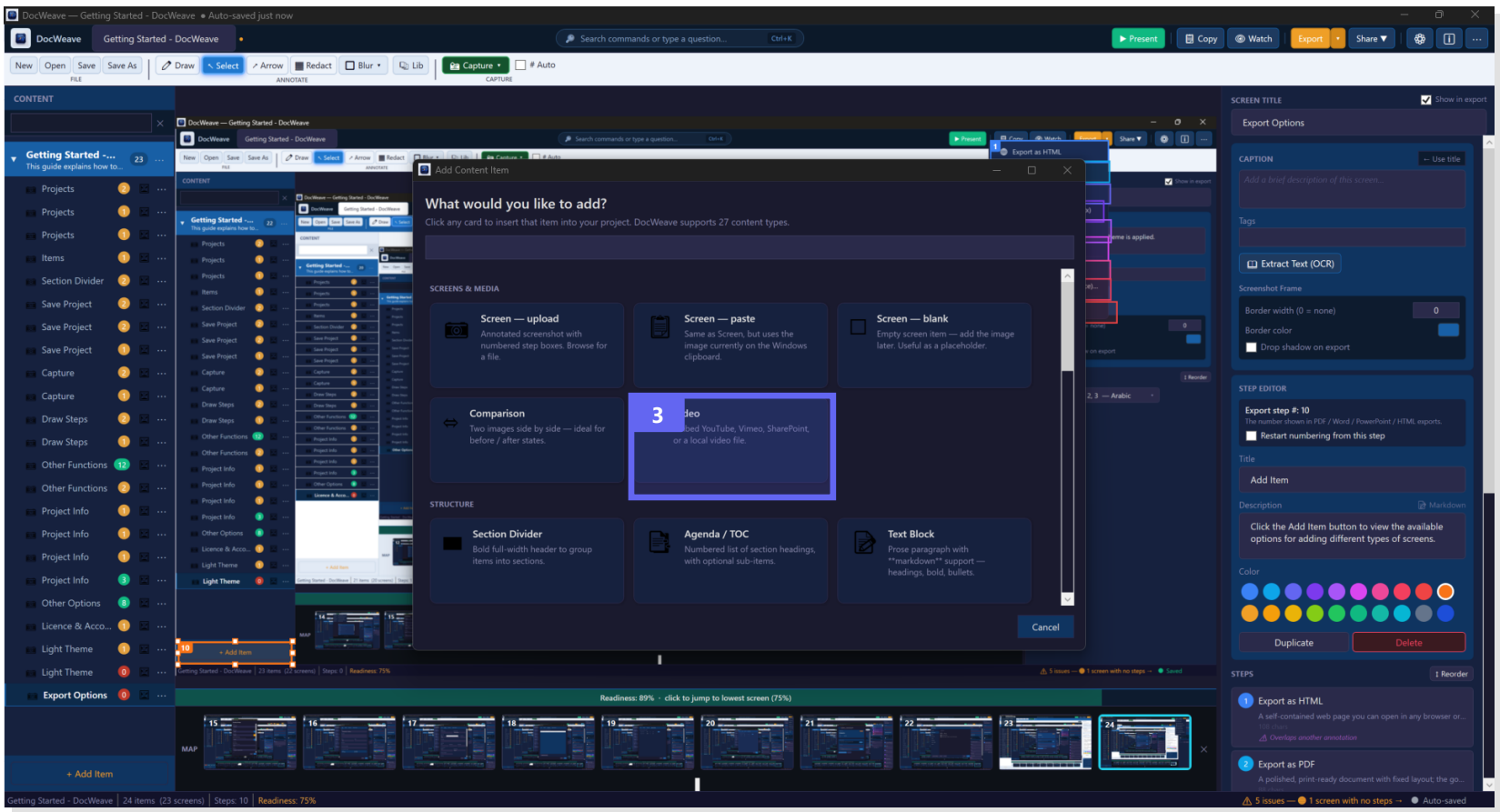




3

STEP 3
Video Embed

Embed a video clip or link inside the document.

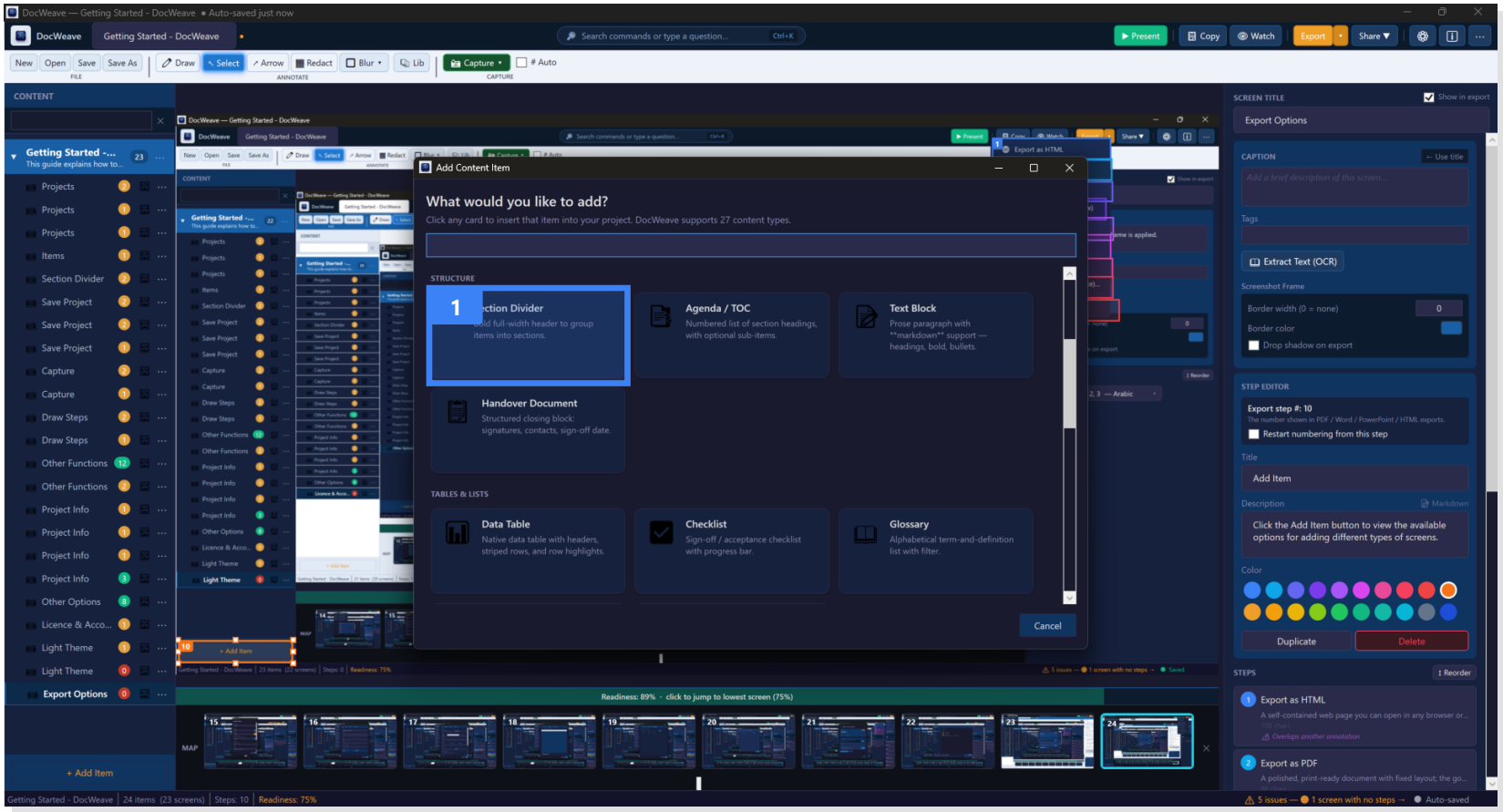




1

STEP 4
Section Divider

A heading that groups screens into collapsible sections.

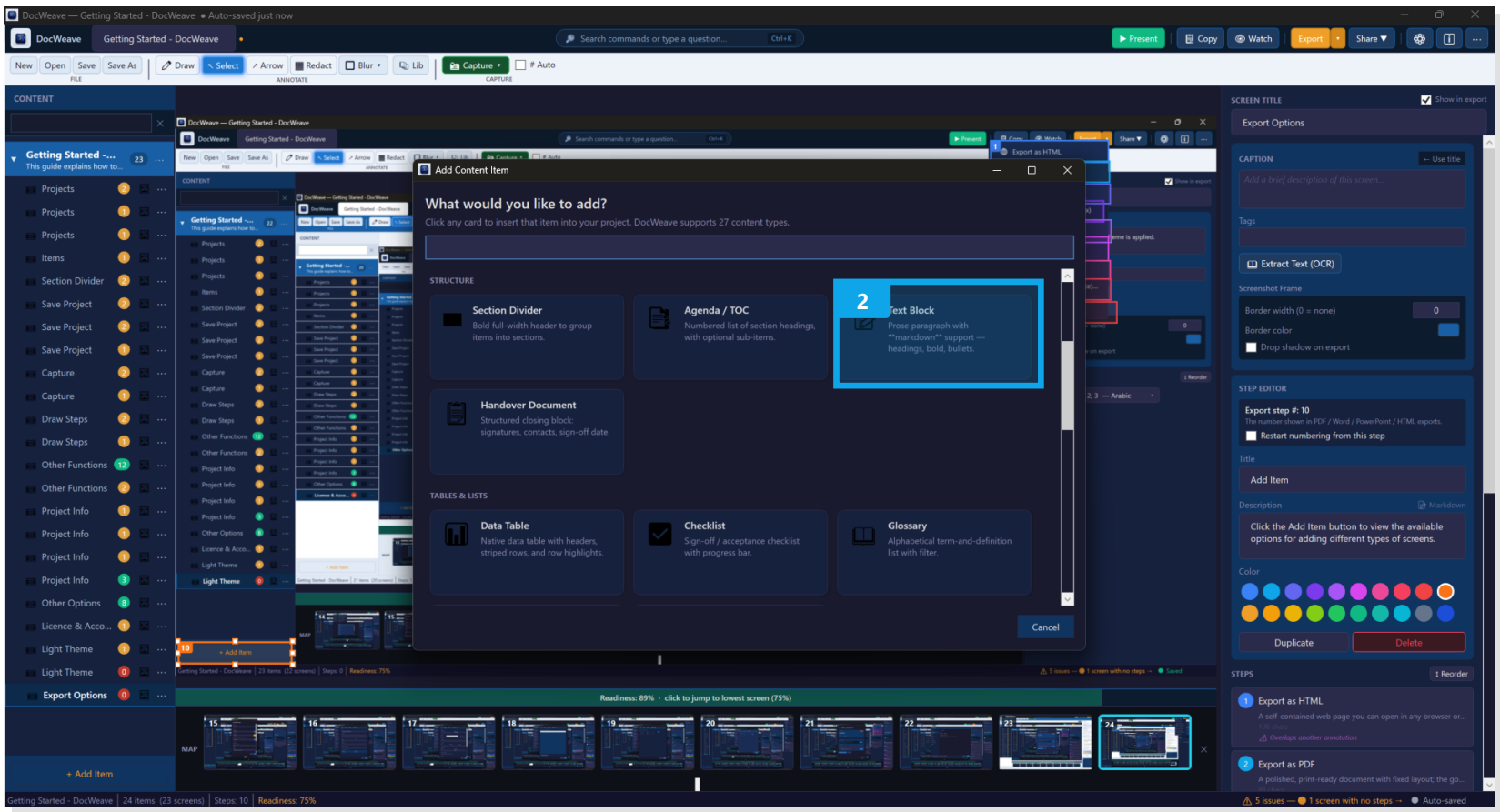




2

STEP 5
Text Block

Free-form rich text for intros, notes, or explanations.

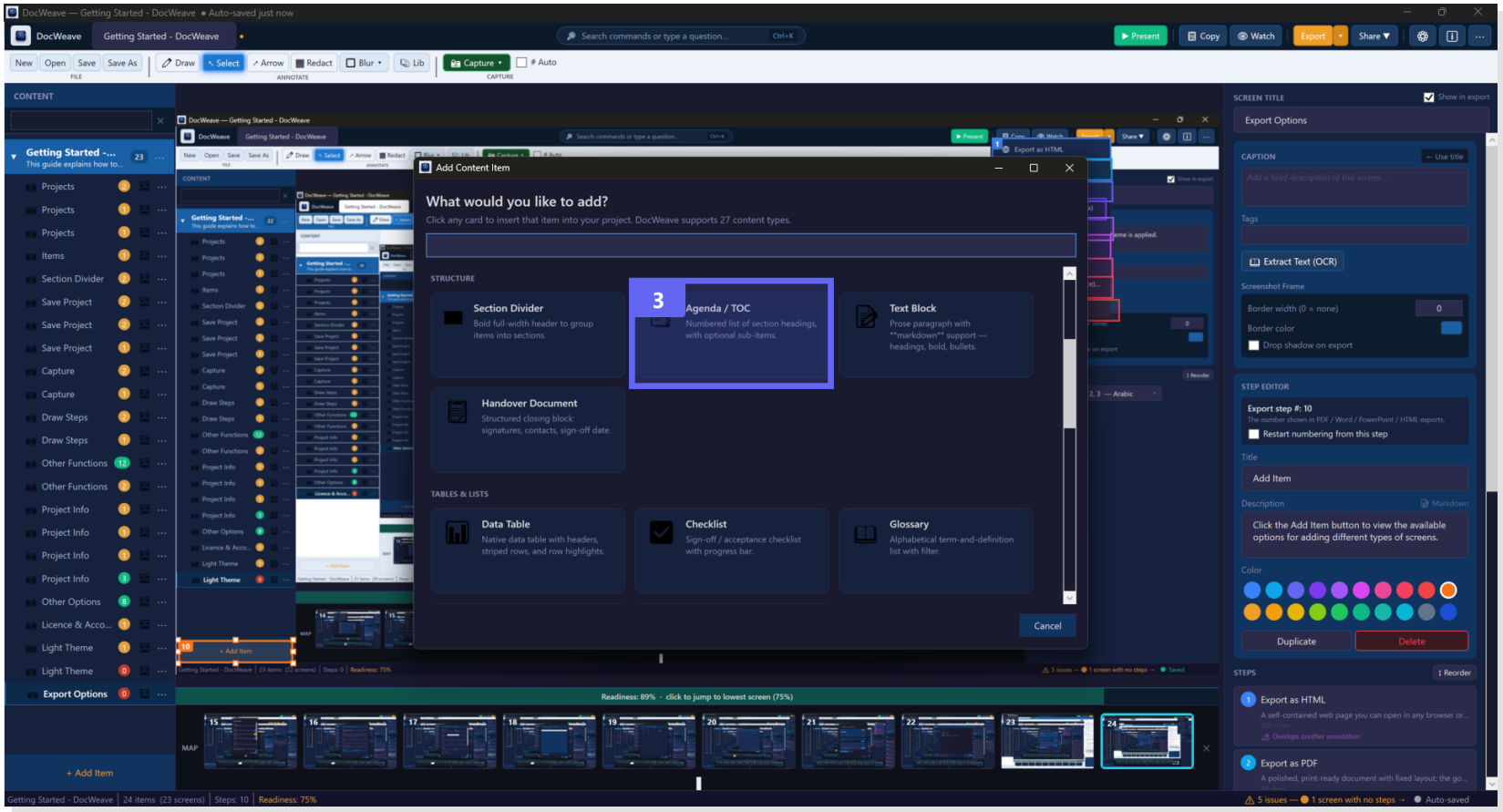




3

STEP 6
Agenda / TOC

An auto-style agenda or table of contents.



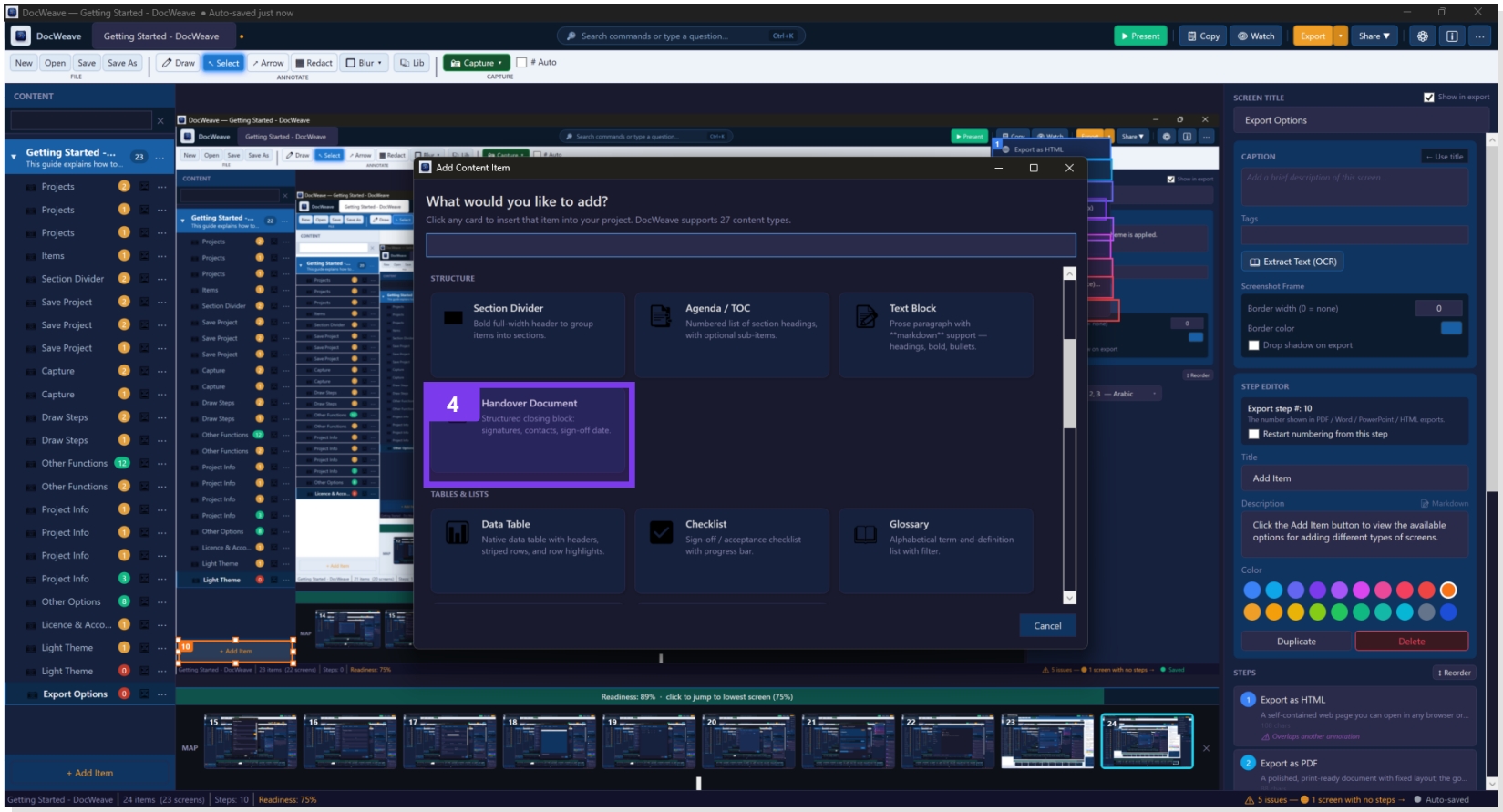
Add Item



4

STEP 7
Handover Document

A structured sign-off page: go-live date, key contacts, and training summary.

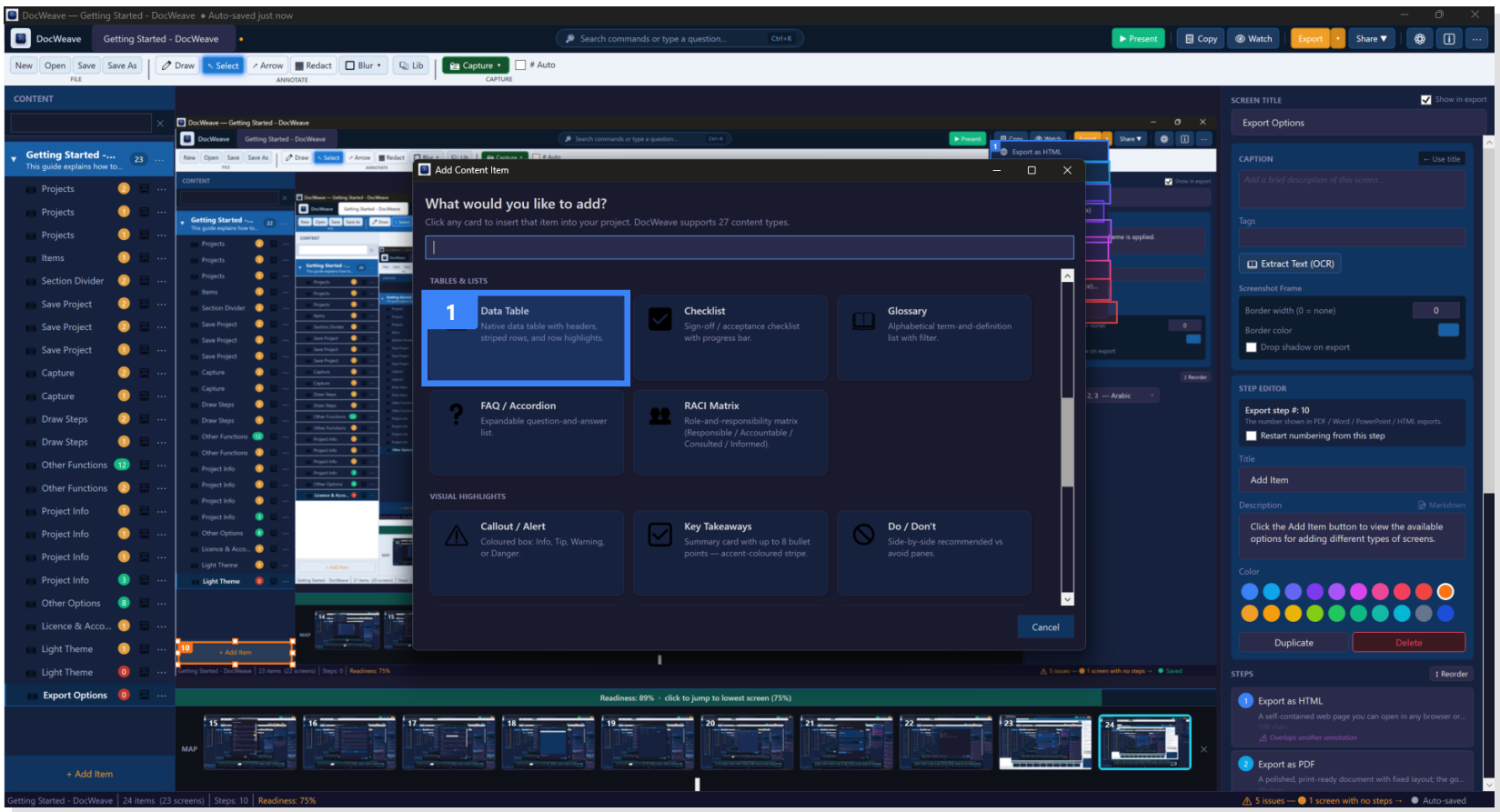




1

STEP 8
Data Table

Rows and columns for structured data.

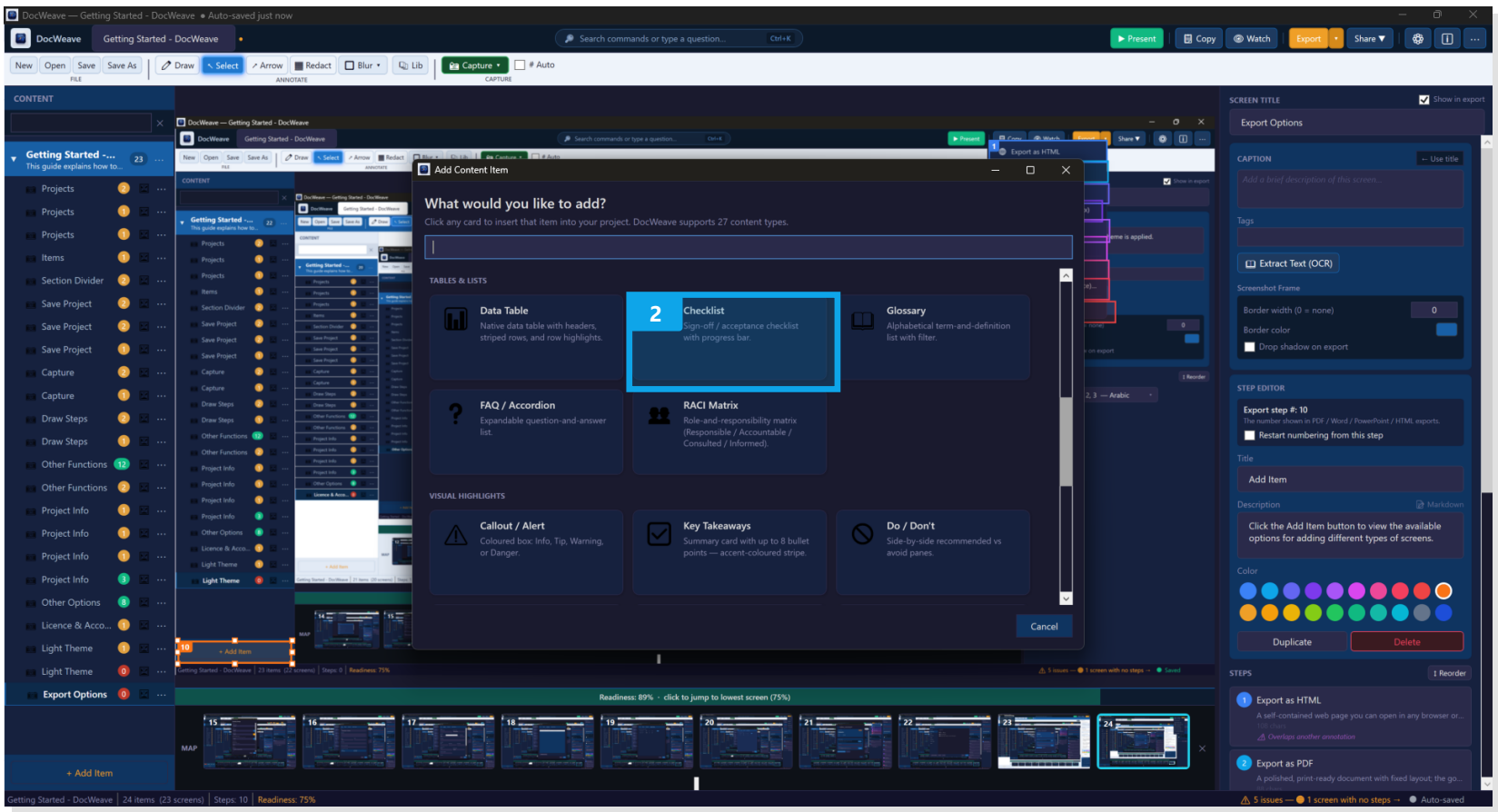




2

STEP 9
Checklist

A tickable list for tasks or sign-offs.



Add Item

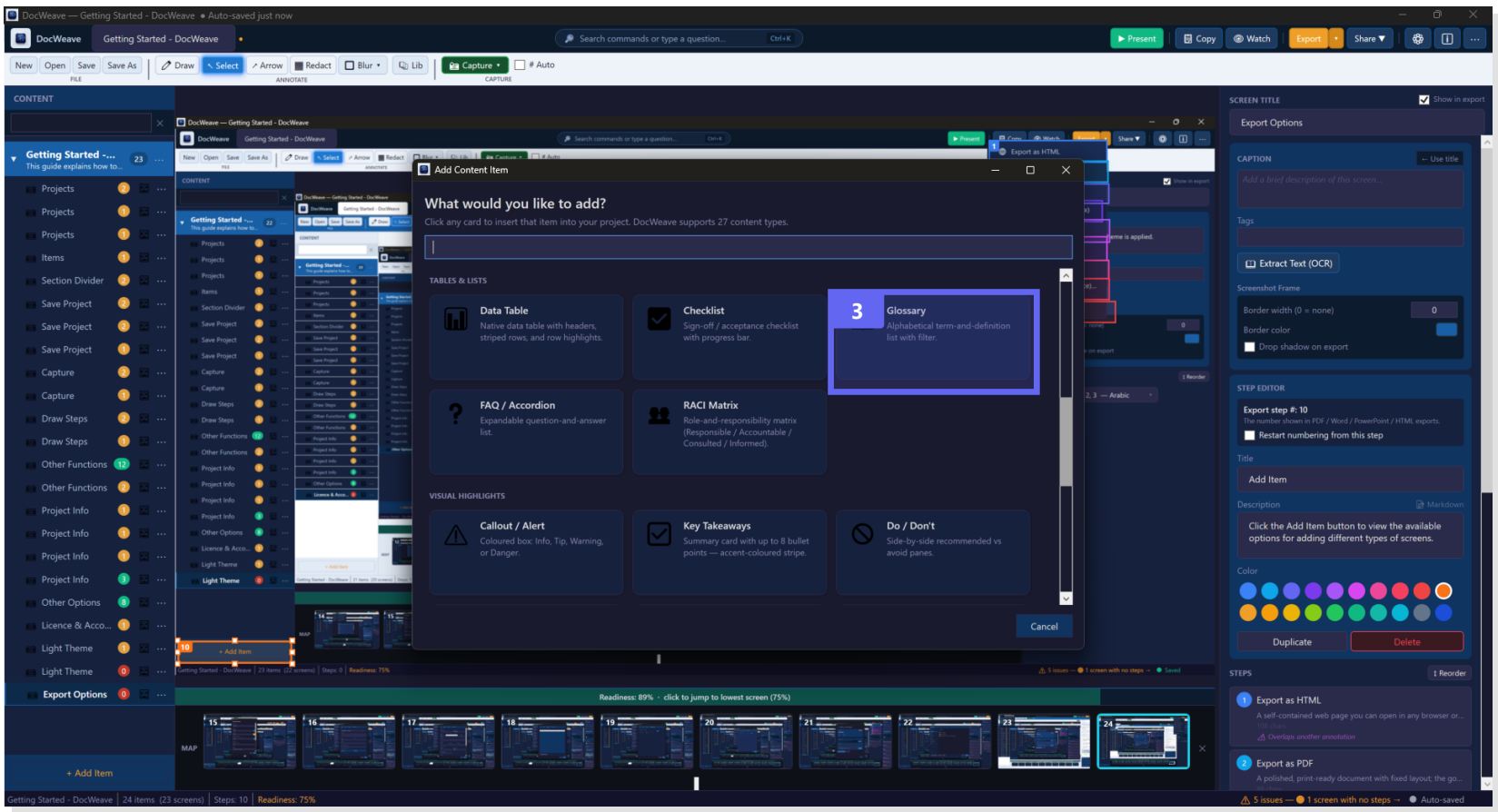


3

STEP 10

Glossary

Defined terms and acronyms.

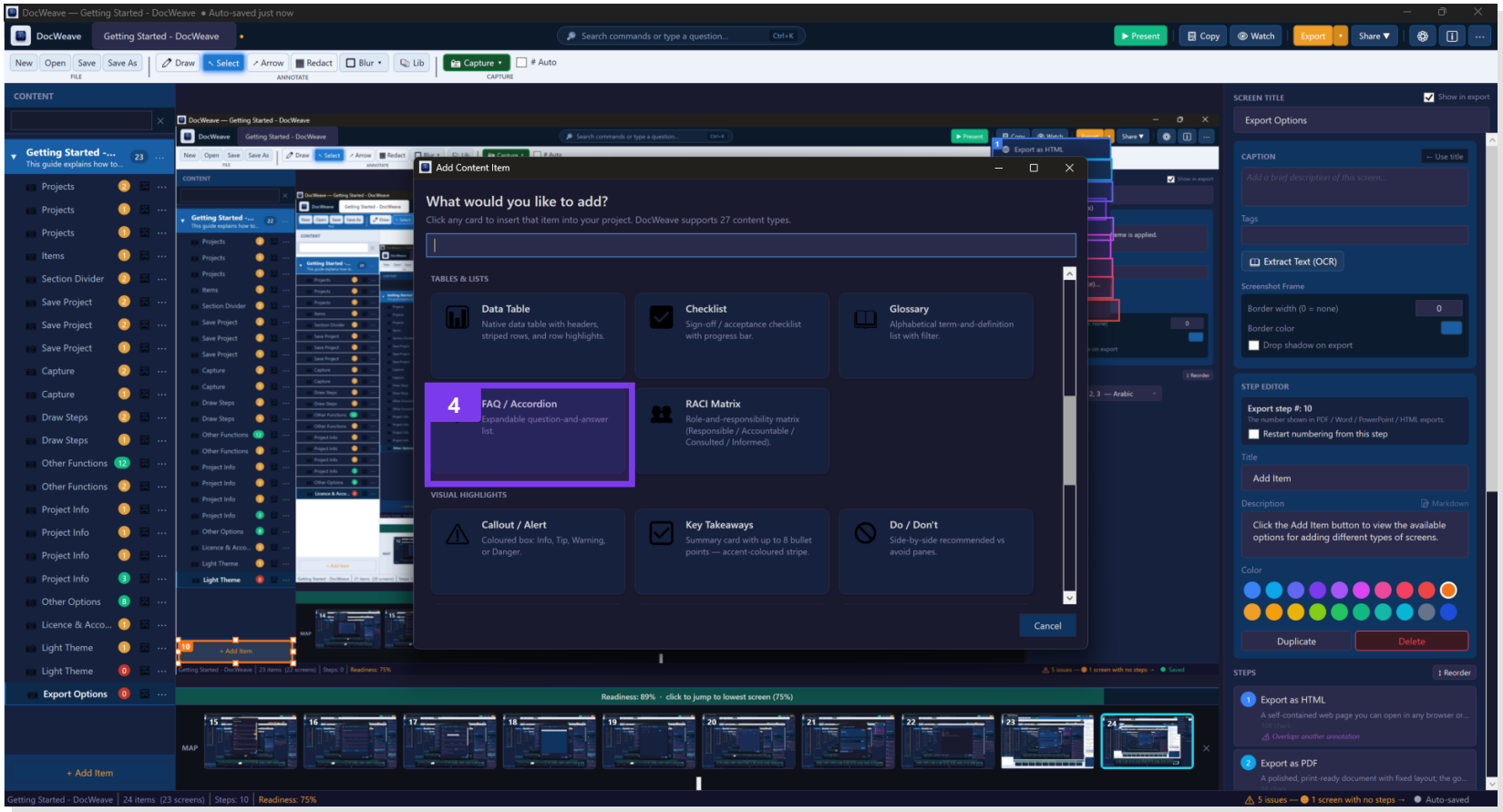




4

STEP 11
FAQ / Accordion

Expandable question-and-answer pairs.

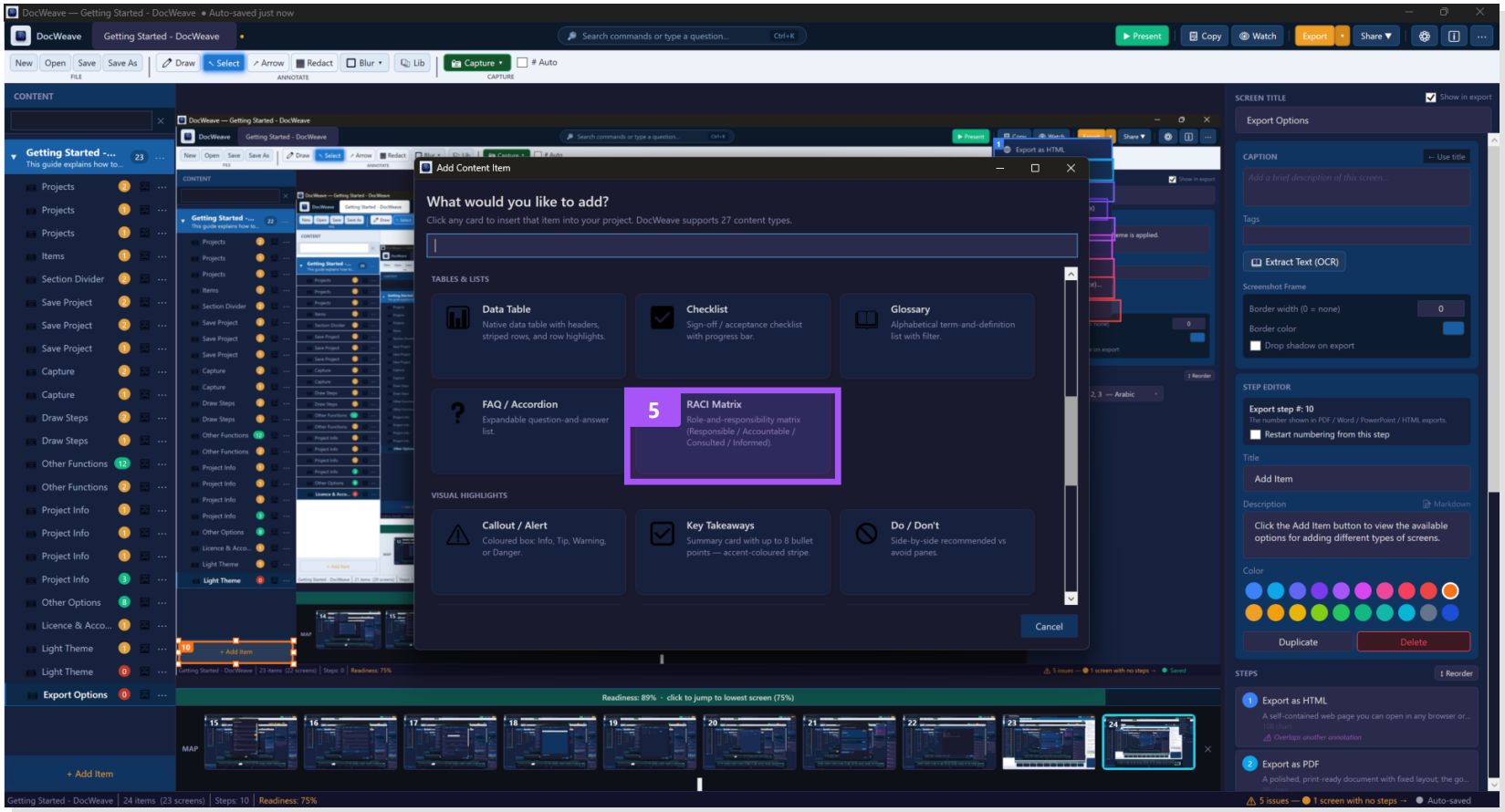




5

STEP 12
RACI Matrix

Map responsibilities (Responsible, Accountable, Consulted, Informed).

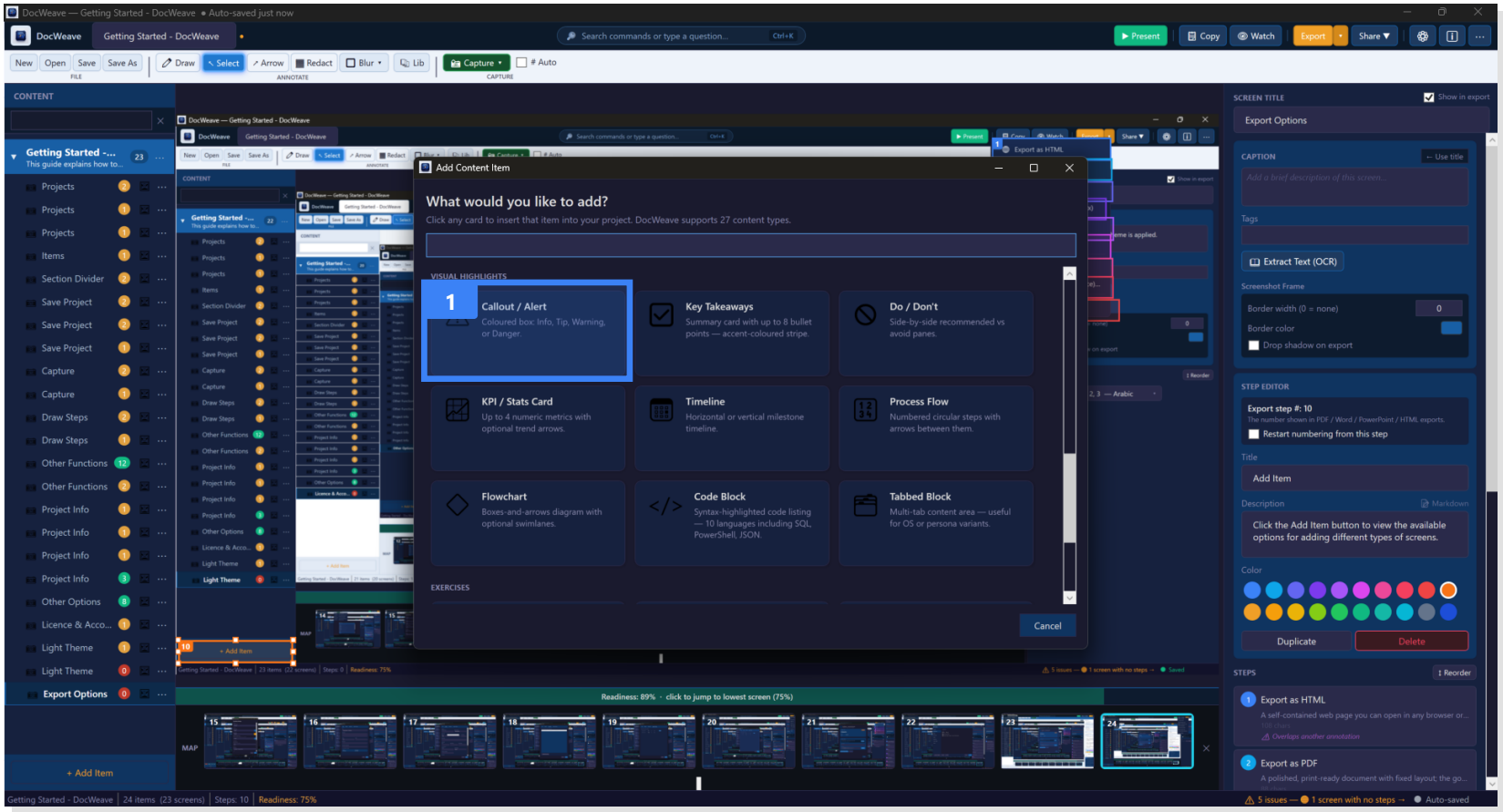




1

STEP 13
Callout / Alert

A colored notice for tips, warnings, or important notes.

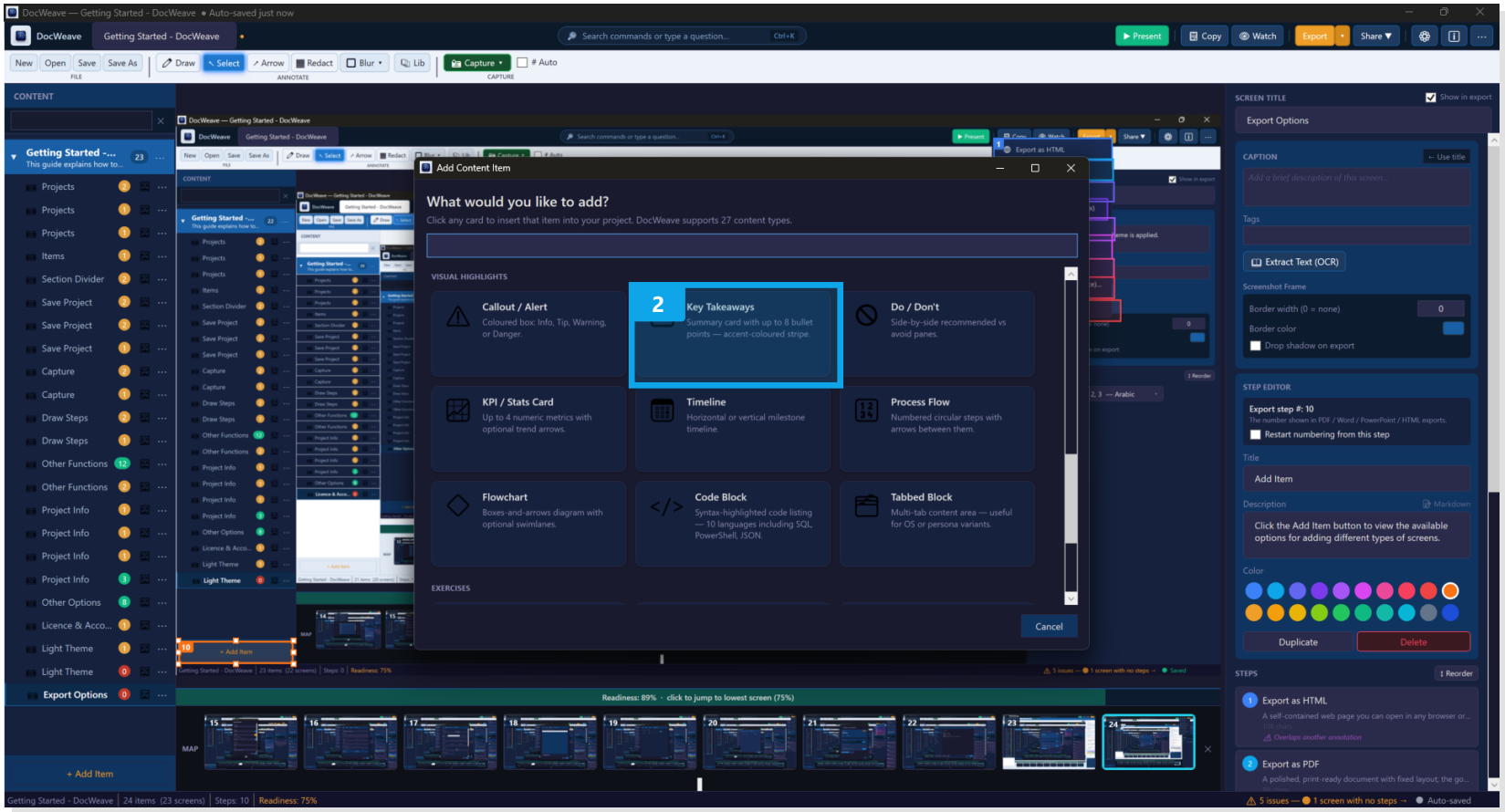




2

STEP 14
Key Takeaways

Highlight the main points to remember.

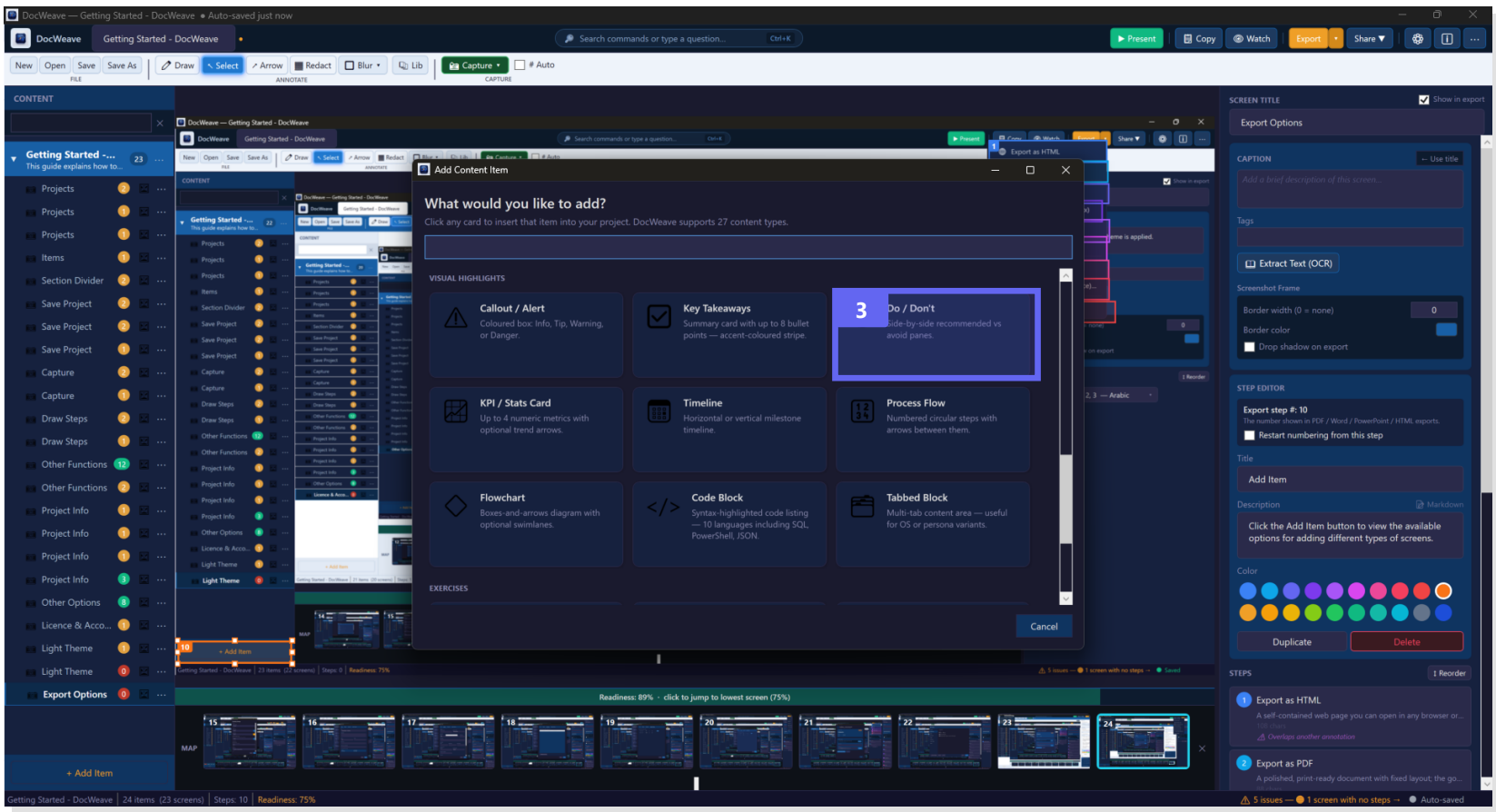




3

STEP 15
Do / Don't

Side-by-side best-practice vs. pitfall guidance.

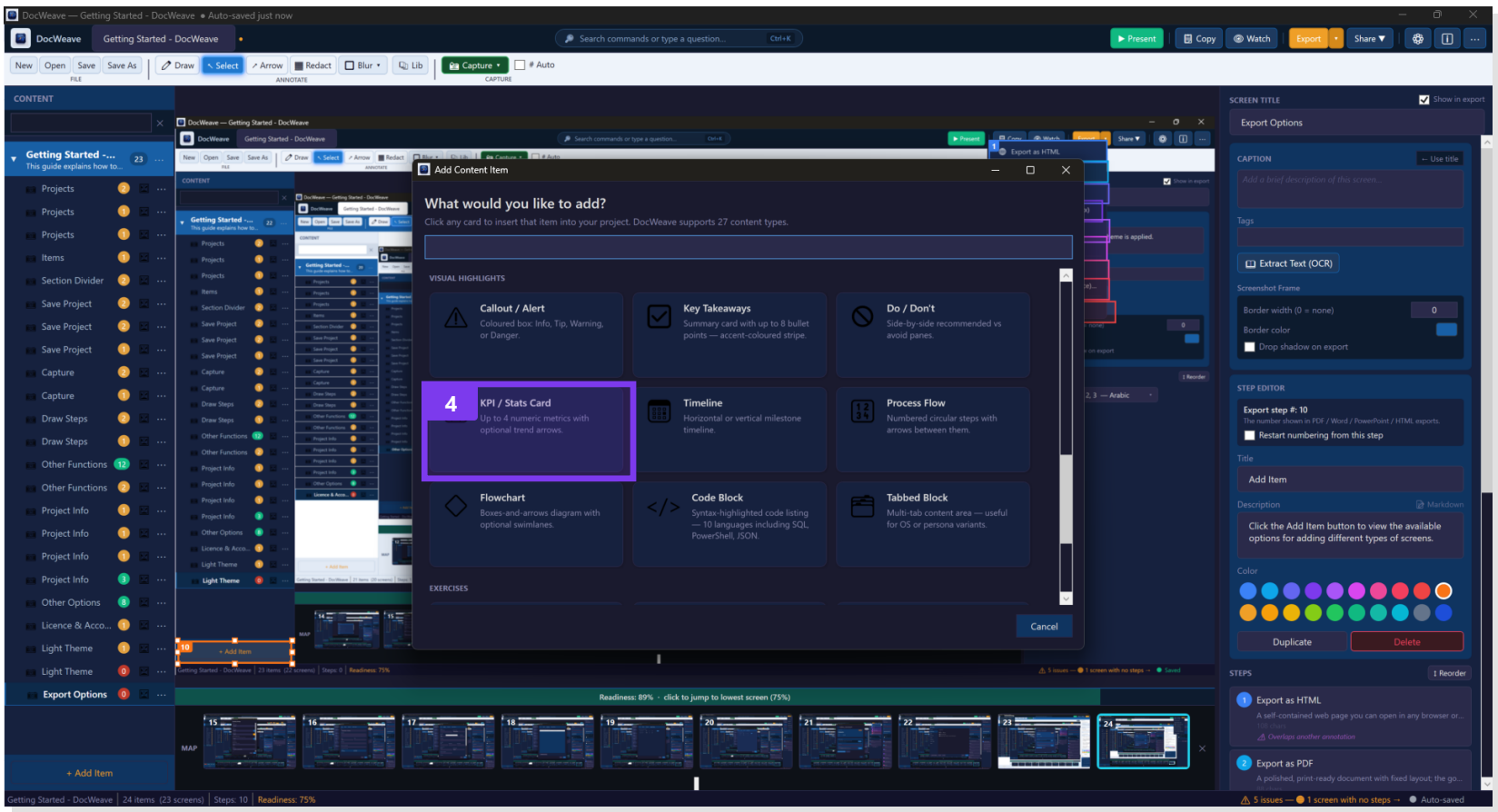




4

STEP 16
KPI / Stats Card

Headline metrics with trend indicators.



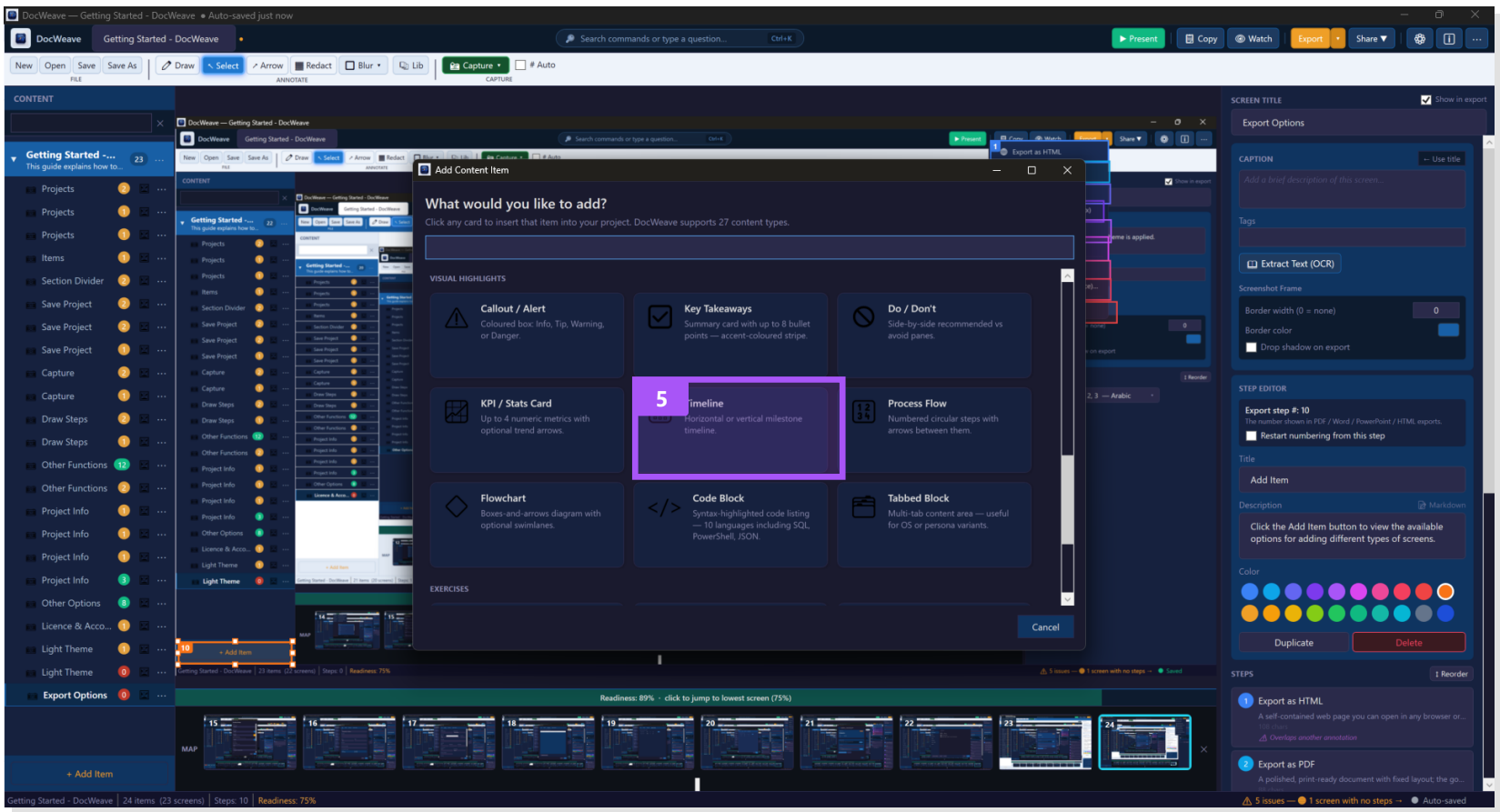
Add Item



5

STEP 17
Timeline

Milestones along a horizontal or vertical track.

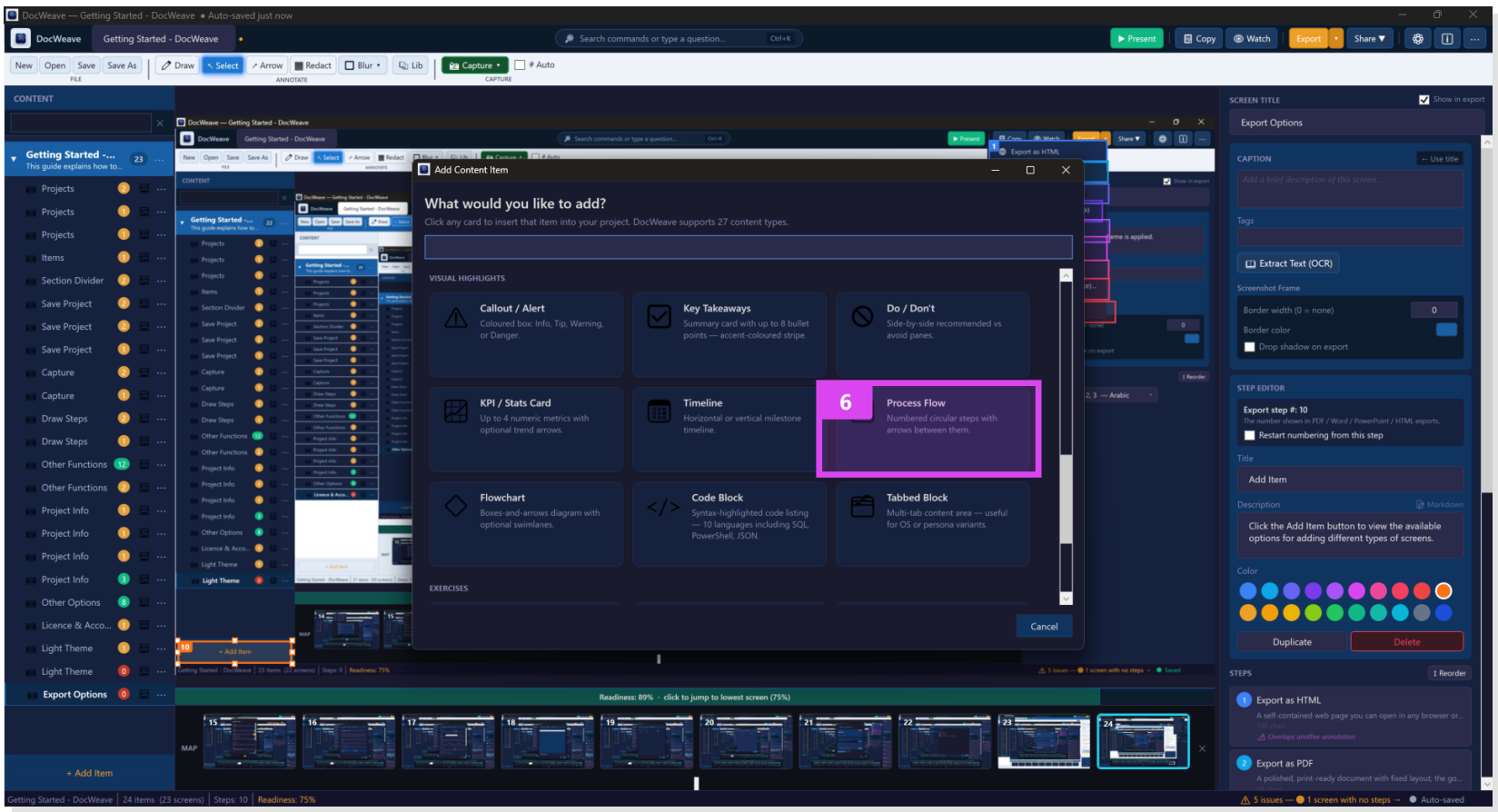




6

STEP 18
Process Steps

A numbered step-by-step sequence.

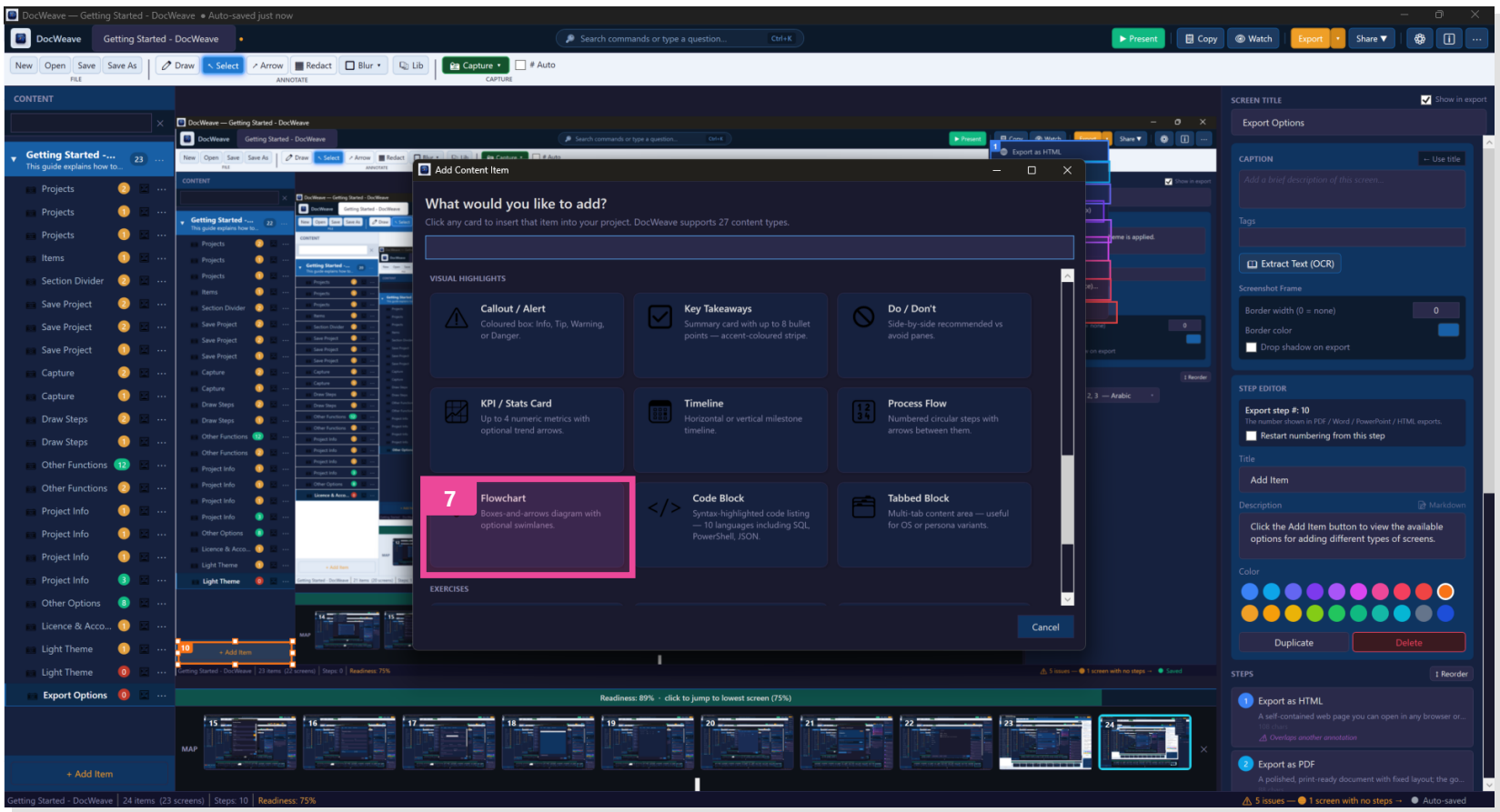




7

STEP 19
Flowchart

A connected node diagram of a process.

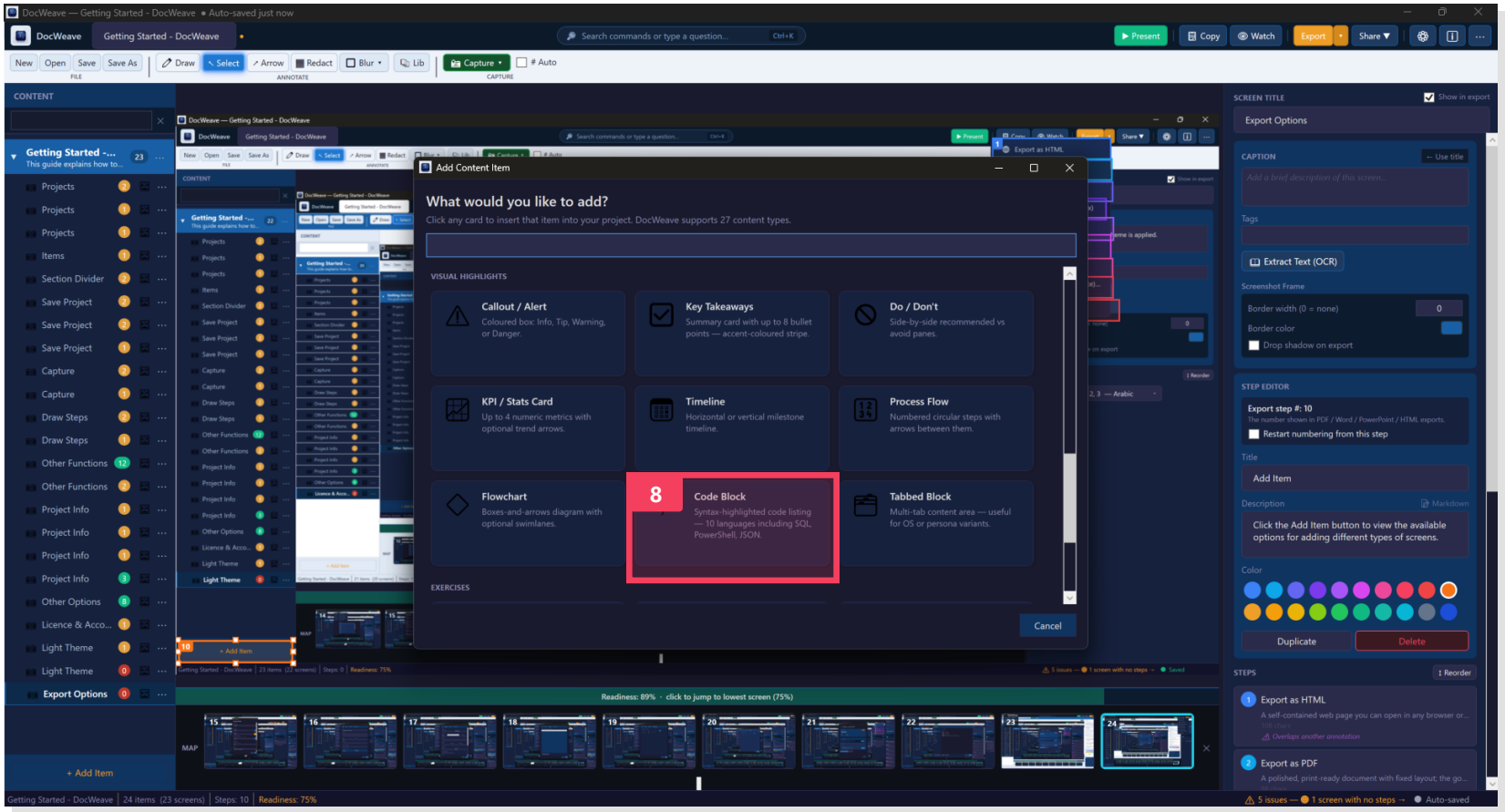




8

STEP 20
Code Block

Syntax-styled code or commands.

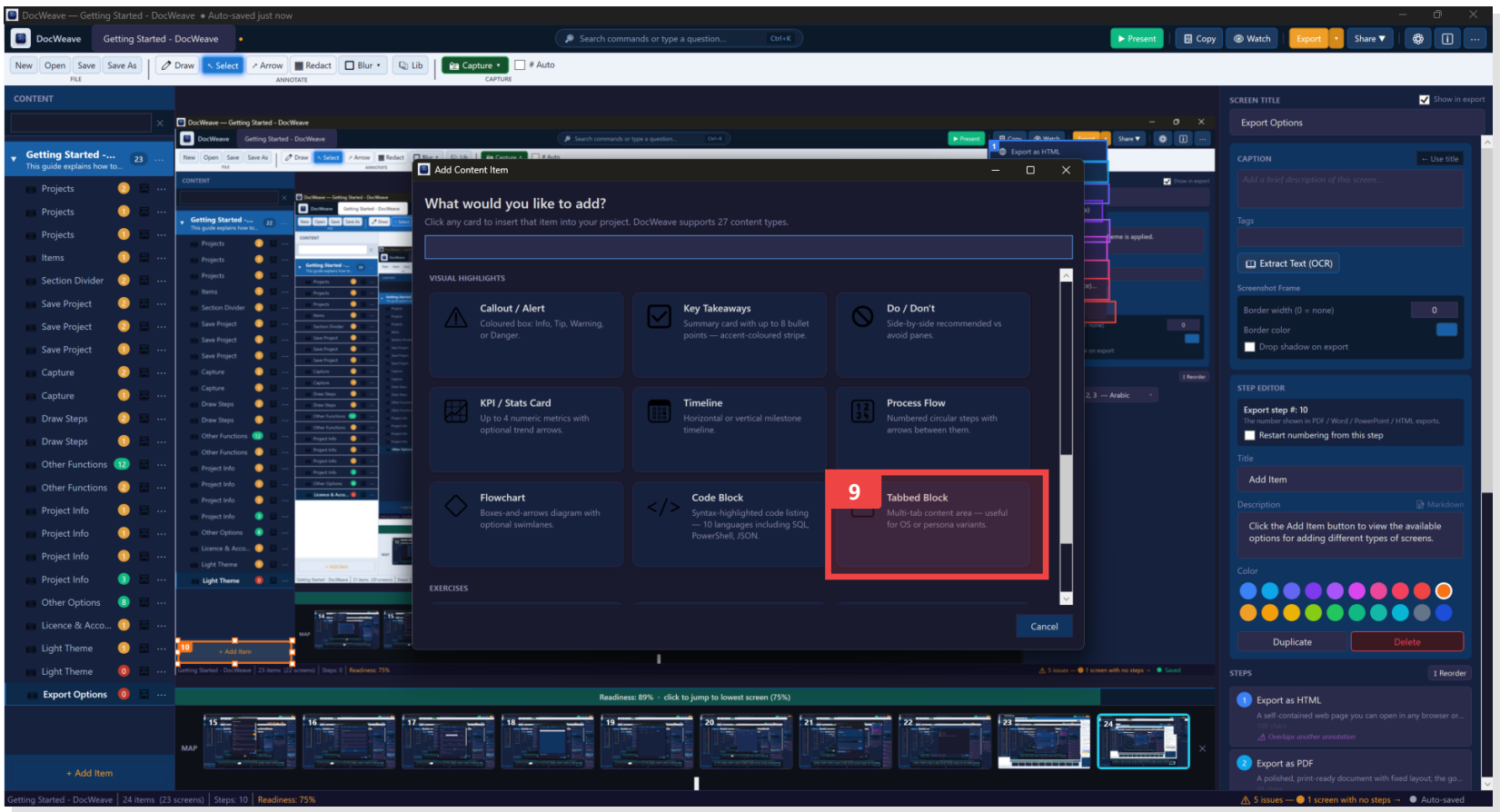




9

STEP 21
Tabbed Block

Group related content into switchable tabs.



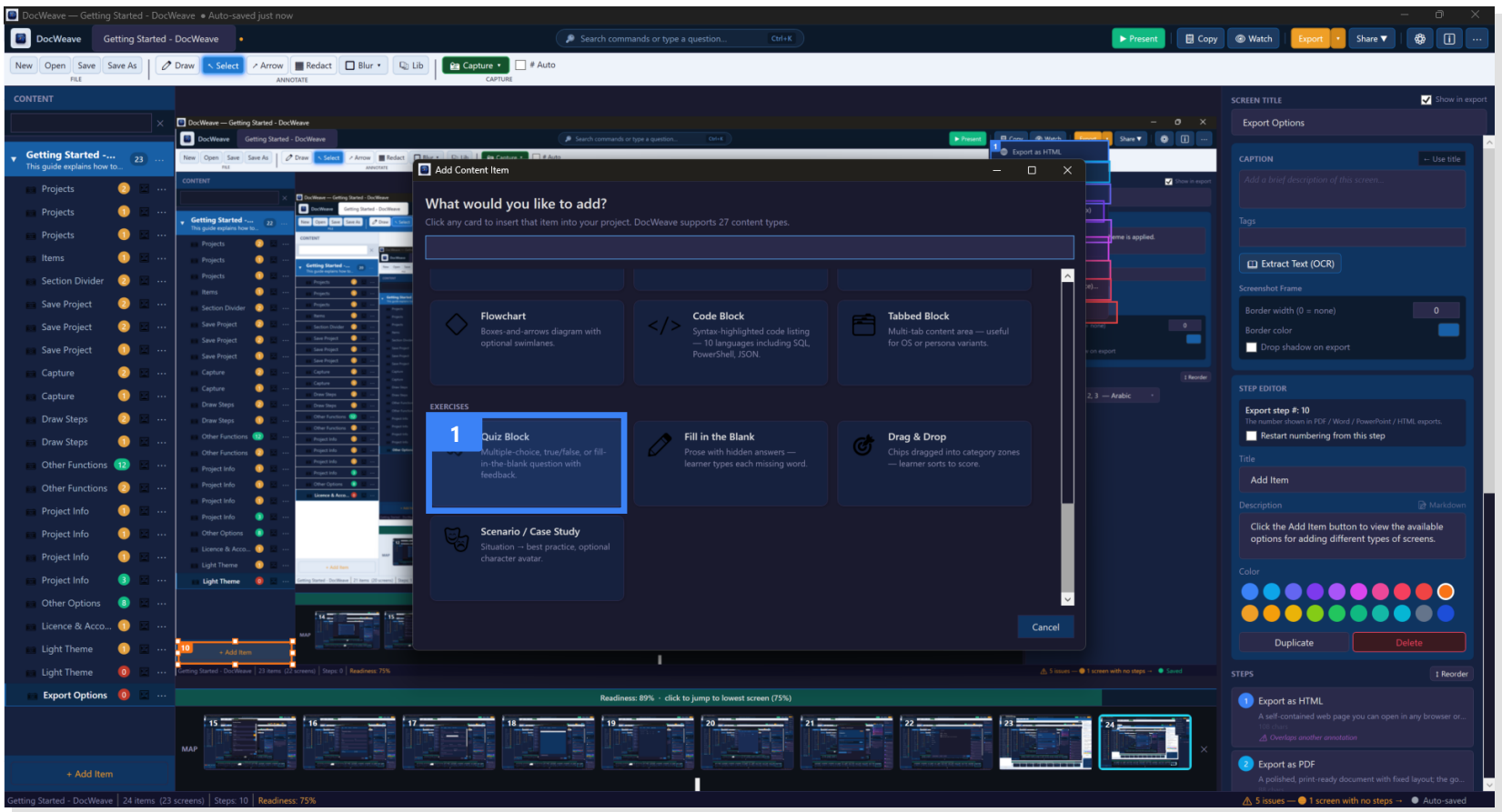
Add Item



1

STEP 22
Quiz Block

A question with answers to test the reader's knowledge.



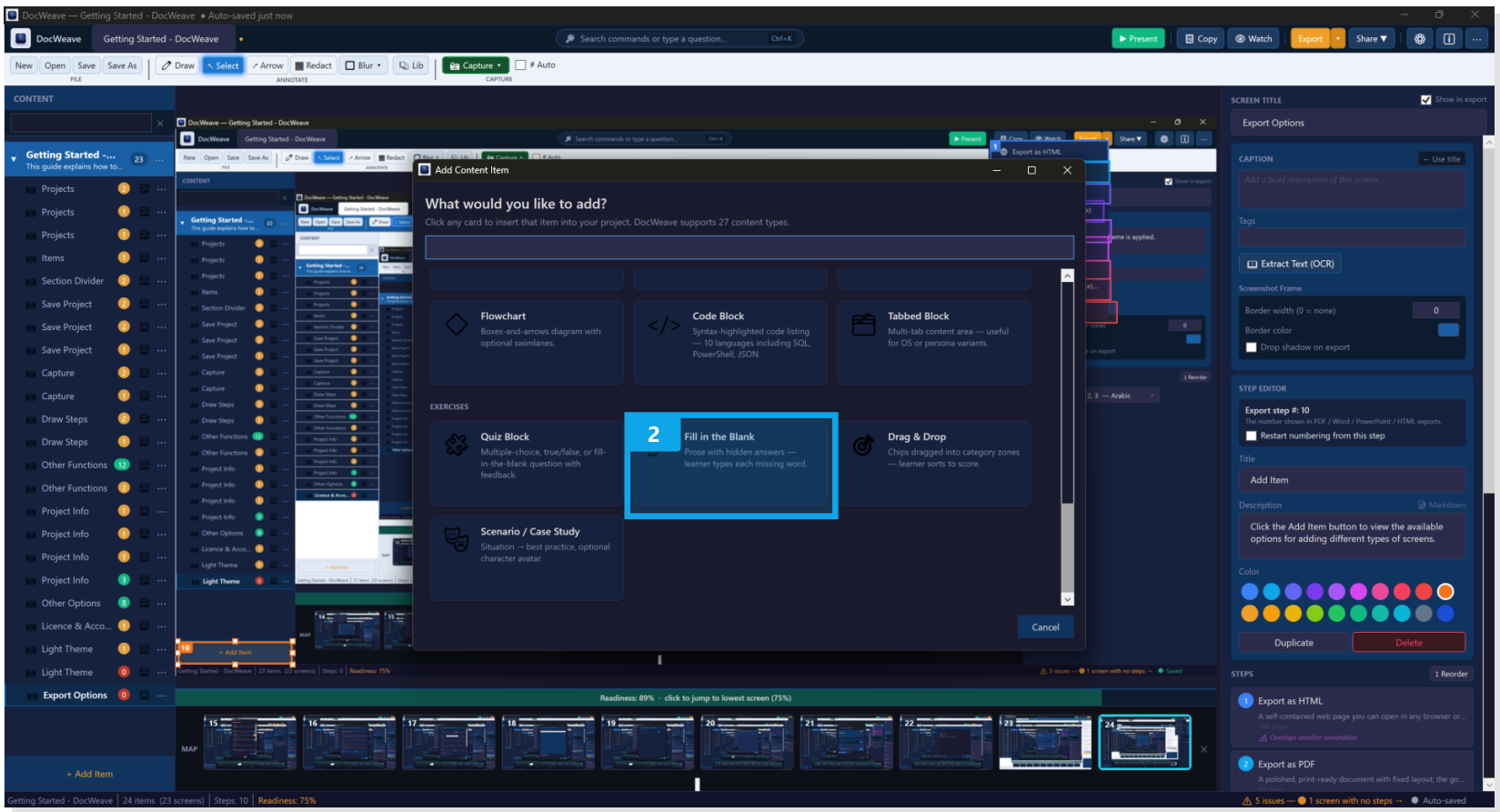


2

STEP 23

Fill in the Blank

An interactive complete-the-text exercise.



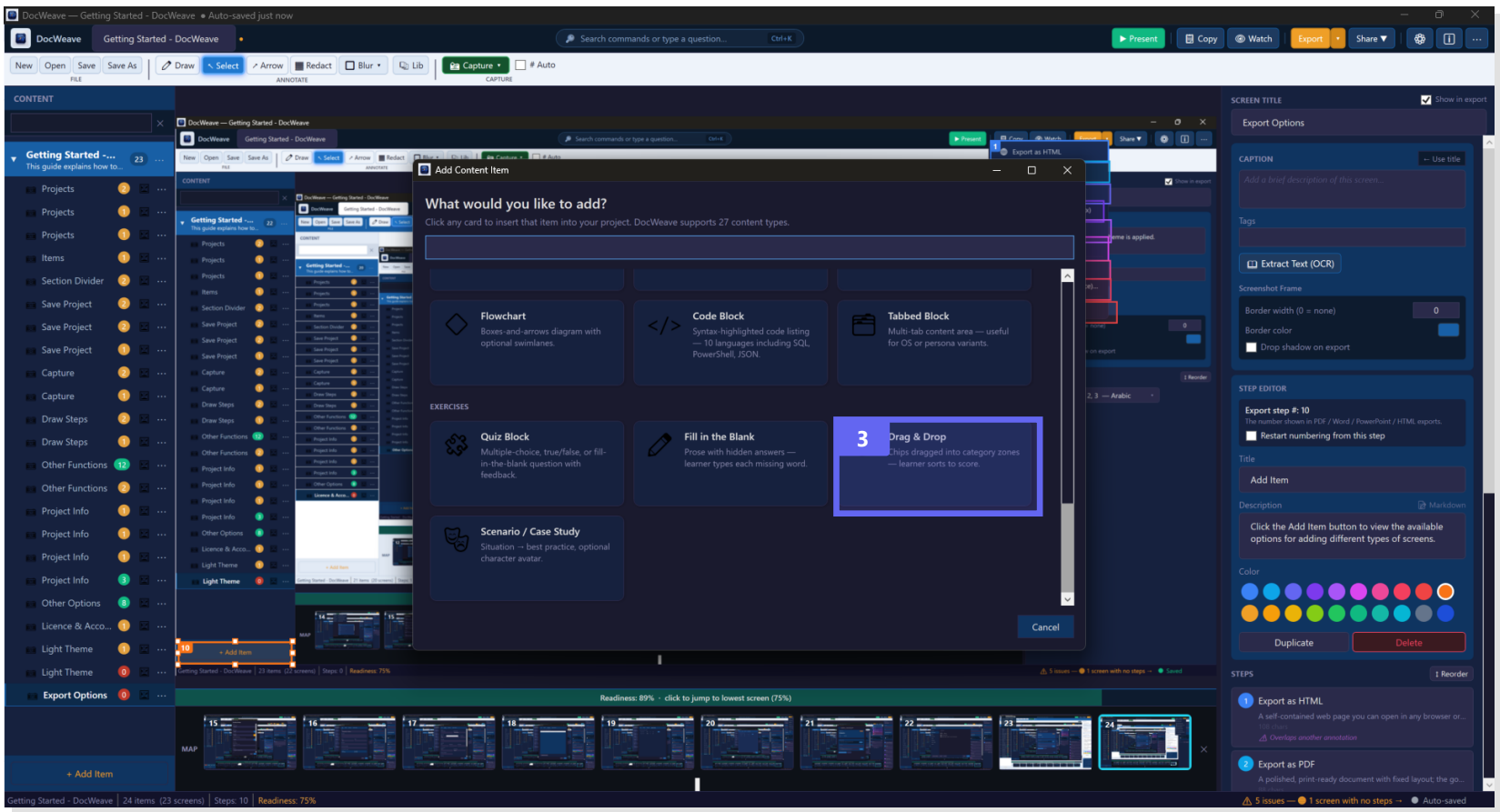
Add Item



3

STEP 24
Drag & Drop Exercise

A match/sort interaction for practice.





4

STEP 25
Scenario / Case Study

A narrative example or situation walkthrough.

