StepCert

Quick start: the settings that matter

What to check before your first recording, what each group of settings does, and how each important setting changes your guides, documents and courses.

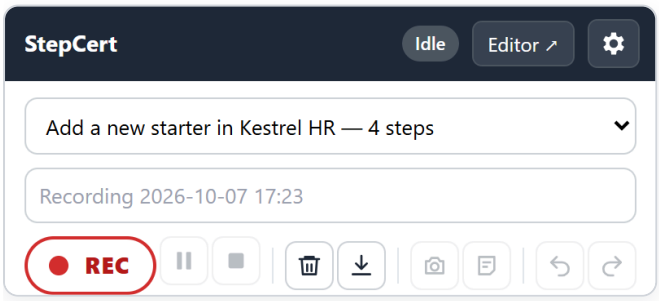
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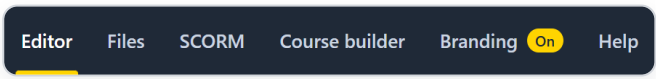
Where the settings are

StepCert has settings in two places. The **side panel** decides how you record. The **editor's tabs** decide how your guides and courses look. Recording settings work on what you record *next*, so check them first. Everything in the editor can be changed later and exported again.

Where	What it holds	What it affects
Side panel ⚙ › **Recording**	Result pictures, hiding personal details, dialogs, web addresses, Tab presses	What goes into every new recording, and so into every document and course made from it
Side panel ⚙ › **General**	How long messages stay on screen, and the sound for each screenshot	The side panel and the editor
Side panel ⚙ › **Account**	Your licence, the browsers you use and Sign out	Whether you can record and export
Editor › **Files** tab	The export format, picture options (layout, quality, magnifier, dimming, results) and document options (legend, step numbers, metadata, page size, timing)	Documents, web pages, slides, animations and video
Editor › **SCORM** tab	The LMS format, pass mark, which levels count, the score and what the LMS records	Training courses and certificates
Editor › **Course builder** tab	What a course holds (walkthroughs, videos, documents, links, quizzes), how learners complete it, and its LMS format	Courses made of several items. Each course keeps its own settings
Editor › **Branding** tab	Banner, logo, colours, note slides and screenshot colours	Every output, documents and courses alike



The side panel. ⚙ (top right) opens the recording settings.



The editor's tabs. Files, SCORM, Course builder and Branding hold the output settings.

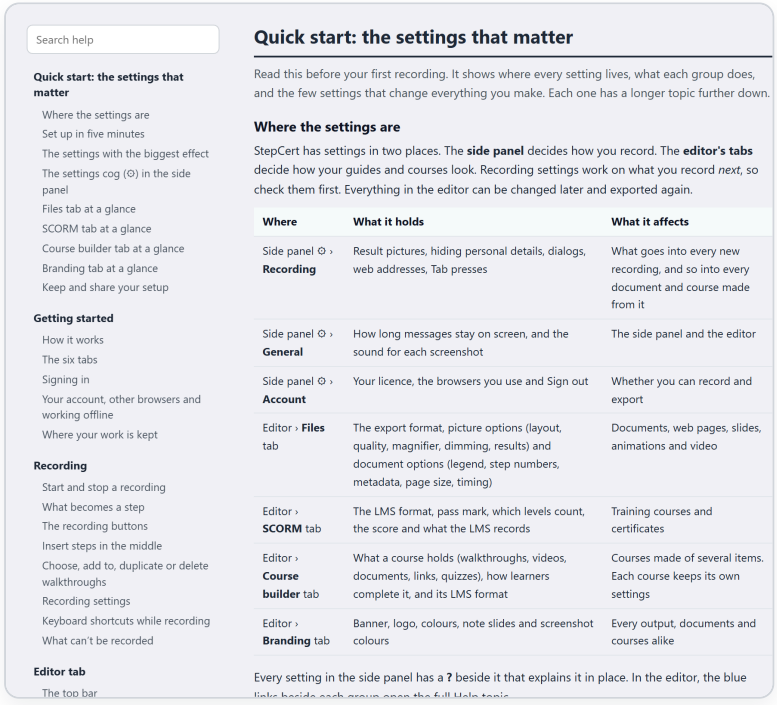
Every setting in the side panel has a **?** beside it that explains it in place. In the editor, the blue links beside each group open the full Help topic.

Set up in five minutes

1. **Sign in** in the side panel with your email and licence key.
2. **Check the recording settings**: click ⚙ at the top of the side panel, then **Recording**. Keep **Hide personal details automatically** on, and choose how many **result pictures** you want.
3. **Add your brand**: on the editor's **Branding** tab, add a logo or banner and a few colours, and choose the **Note slides** style.
4. **Choose your export**: on the **Files** tab, pick the format your readers use and check **Image quality**, **Legend** and **Branding**.
5. **If you use an LMS**: on the **SCORM** tab, pick the format your LMS lists and set the **pass mark**. For xAPI or cmi5, set the **ID base** to your own web address first.
6. **If a course needs more than one walkthrough**, or videos, documents and a quiz around it: use the **Course builder** tab instead of the SCORM tab (Chrome and Edge).
7. **Save a settings template** on the Files tab. It keeps all of the above in one .stepcert file, so you can restore it or give it to your team.

EXAMPLE

A trainer sets up StepCert on Monday morning. They keep the recording defaults, add the company logo and navy and orange colours, choose **Word document** at **Balanced** quality, pick **SCORM 1.2** with an 80% pass mark, and save `training-team.stepcert` for the rest of the team. Every guide from then on looks the same.



The same quick start is the first page of the Help tab in the editor.

The settings with the biggest effect

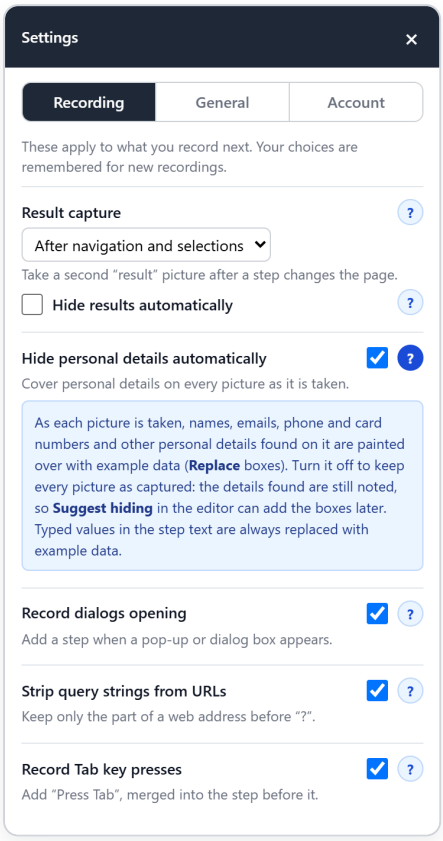
Most settings tweak one detail. These change what is captured, what readers see, or what learners are marked on, so check them before you start. Essential marks the ones to check on first use.

Setting	Where	Starts as	What it changes
Hide personal details automatically Essential	⚙ › Recording	On	Names, emails, phone and card numbers and similar details are painted over with example data on every picture as it is taken. Turned off, real details stay in the pictures until you cover them yourself.
Result capture Essential	⚙ › Recording	After navigation and selections	Adds a second “what you should see next” picture after steps that change the page. More results make longer documents, decks and videos. They can only be taken while recording: you can hide them later, but not add them.
Hide results automatically	⚙ › Recording	Off	Result pictures are still taken but start left out of every export. You untick **Hide result** on the steps where they help.
Apply branding Essential	Files, SCORM or Branding tab	On	One switch, shown on all three tabs. It puts your banner, logo and colours on every export and course. With nothing set up on the Branding tab, it changes nothing.
Note slides	Branding tab	Dark	How every note looks: a slide the size of a screenshot, dark or light, in all outputs except Markdown and JSON. It applies even with branding off.
Format Essential	Files tab	Word document	The kind of file you export. One walkthrough can be exported in every format.
Image quality	Files tab	Native	The size of the file. Native is sharpest but largest. Compact makes files small enough to email.
Pass mark and **Levels that count** Essential	SCORM tab	80%, any level	When a learner passes, gets a certificate and shows as complete in your LMS.
ID base (xAPI and cmi5) Essential	SCORM tab	A placeholder	The address that identifies your course in the learning record store. Set it once, before your first upload, and never change it: a new ID base makes a new course.

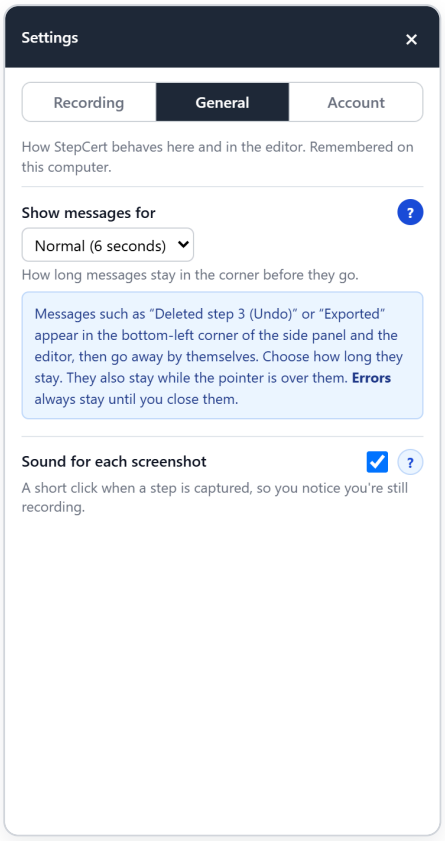
> **Personal details:** StepCert recognises most personal details, but not every name in ordinary page text. Before you share a guide or course, look through the pictures, and use **Suggest hiding** in the editor for anything that was missed. Before each export, StepCert lists any text that still looks personal.

The settings cog (⚙) in the side panel

Click ⚙ at the top right of the side panel. The settings open in three tabs.



⚙ › Recording. Each ? opens an explanation, as here for Hide personal details automatically.



⚙ › General: how long messages stay, and the sound for each screenshot.

Recording

How StepCert records. Your choices are remembered and used for every new recording. They are saved with each walkthrough, so changing them later doesn't change steps already recorded.

Result capture — Off, After navigation, After navigation and selections (the default), or After every step.

> **EXAMPLE**
> With the default, "Click the **Save** button" is followed by a picture of the saved record. In Word it gets its own "Result" heading, in PowerPoint its own slide and in a video its own few seconds. With **After every step**, a 20-step task can give 40 pictures.

Hide results automatically — Takes result pictures but leaves them out of exports until you choose them in the editor. Useful when your app changes the page after almost every click.

Hide personal details automatically — On by default, and best left on.

> **EXAMPLE**
> You type **jamie.morgan@harbourside.example** into Work email. The step reads “Enter the **Work email** (example: **info@example.com**)”, and the picture shows info@example.com. The real address stays on your computer only and never goes into a document or course.

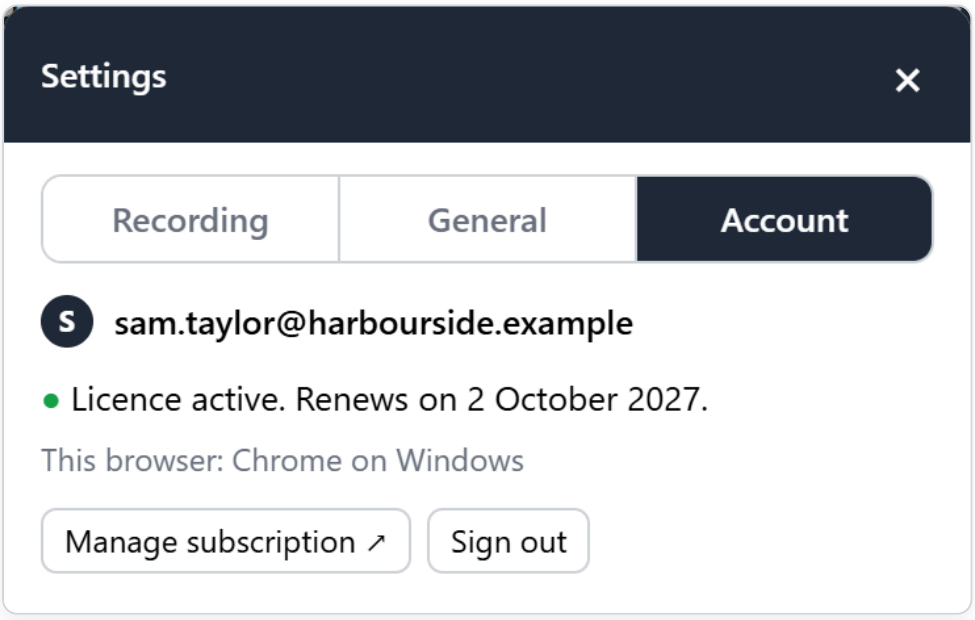
Record dialogs opening	Adds a step when a pop-up or dialog appears by itself, such as a confirmation box. On by default.
Strip query strings from URLs	Keeps record numbers and sign-in tokens out of the web addresses StepCert saves, which readers see in the metadata line. On by default.
Record Tab key presses	Adds “Press Tab” to the step before it, as a numbered action on the same picture. On by default.

General

Show messages for: how long messages such as “Deleted step 3 (Undo)” stay in the corner of the side panel and the editor. Errors always stay until you close them.

Sound for each screenshot: on by default. While you record, a short click plays each time a step is captured, and the **REC** button flashes, so you notice if you've forgotten to stop. It plays only while the side panel is open. It travels in a settings template.

Account



⚙ › Account, when you are signed in.

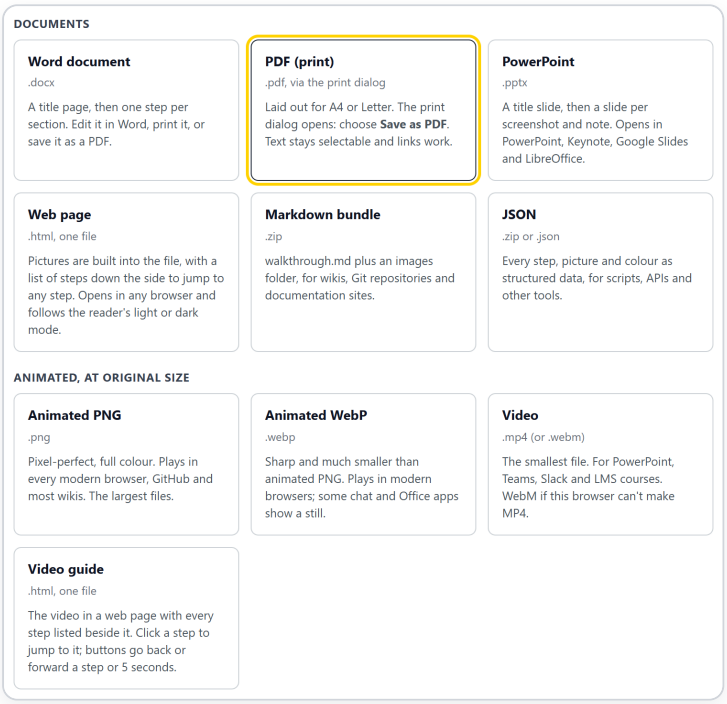
The email you signed in with, whether your licence is active and when it renews, and this browser's name, with **Manage subscription** and **Sign out**. One licence works on up to 3 browsers.

More in the Help tab: **Recording settings**, **Your account**.

Files tab at a glance

The Files tab is where a walkthrough leaves StepCert. It has four parts.

Export a document	Pick a format, check the options under it, then press the export button. Options that don't apply to the format you picked are greyed out, and a label such as **Word and PDF** says which formats an option is for. The Animation options appear when you pick an animated format.
Walkthrough file (.walk)	Save or open the whole editable walkthrough, for backups and for colleagues.
Settings template (.stepcert)	Save or load your branding and all your settings in one file.
This walkthrough	Duplicate or delete it.

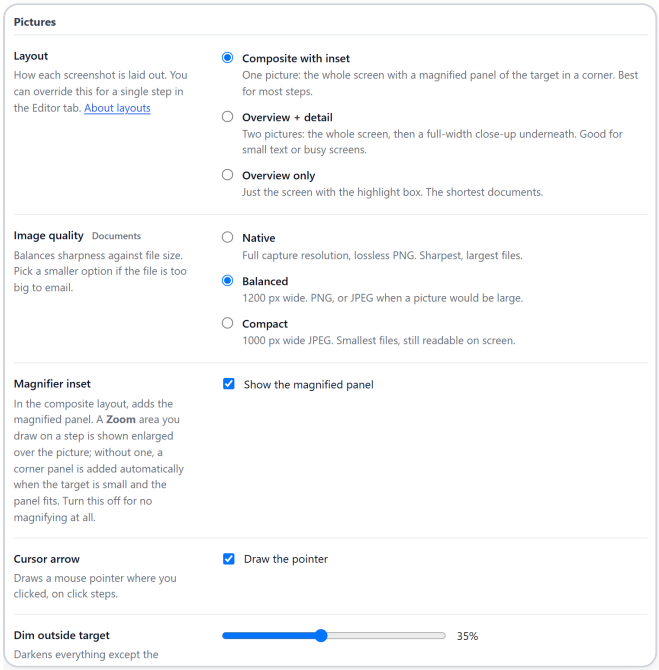


Pick a format. The yellow outline shows the one chosen.

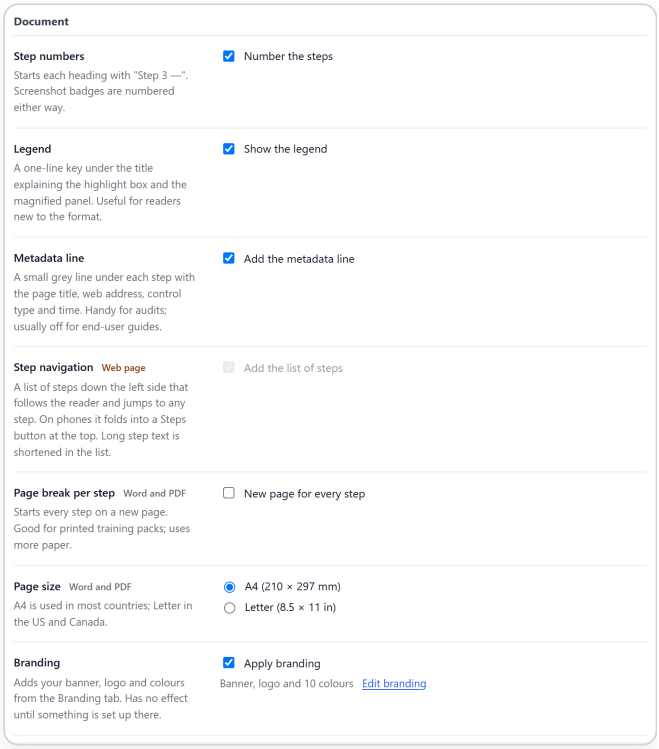
The options that change your file most

Option	What you'll see
Format Essential	Word, PDF, PowerPoint, web page, Markdown, JSON, animated PNG or WebP, video or video guide. Word is the one to choose when someone will edit the guide afterwards.
Layout	**Composite with inset** puts a magnified close-up in the corner of each screenshot. **Overview + detail** gives two pictures per step. **Overview only** makes the shortest documents.

Option	What you'll see
Image quality	Native, Balanced (1200 px) or Compact (1000 px JPEG). A 30-step Word guide at Compact is a fraction of the size at Native.
Result pictures	Untick to leave every result picture out of this export, without deleting them.
Legend, **Step numbers**, **Metadata line**	The key under the title, “Step 3 —” in each heading, and a line under each step with the page, address and time (useful for audits and test evidence).
Branding Essential	Applies the Branding tab. The line under it says what is set up, for example “Banner, logo and 4 colours”.
Time per step and **Time per note**	Animations and video only. How long each screenshot and each note stays on screen. Leave Time per note blank and longer notes stay longer.



Pictures: layout, quality, magnifier, cursor, dimming and result pictures.

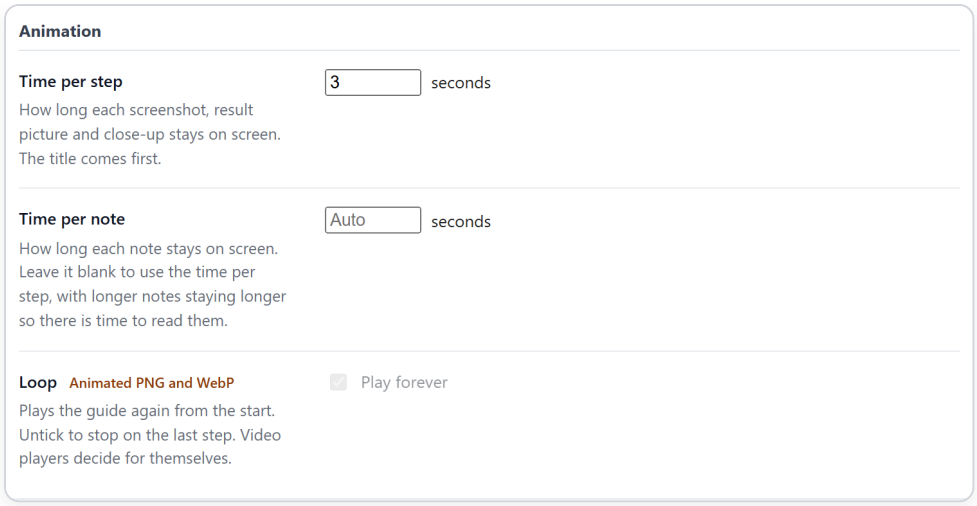


Document: numbers, legend, metadata, navigation, pages and branding. Rows that don’t apply to the format are greyed out.

Each walkthrough remembers the options last used with it, and a new walkthrough starts from the ones you used most recently.

> **EXAMPLE**
> The same walkthrough becomes a Word handout (Page break per step on), a web page for the intranet (Step navigation on) and a 1 MB video for Teams (Time per step 3 seconds, Time per note 6 seconds). Nothing is re-recorded.

More in the Help tab: **Choosing a format**, **Document options**.

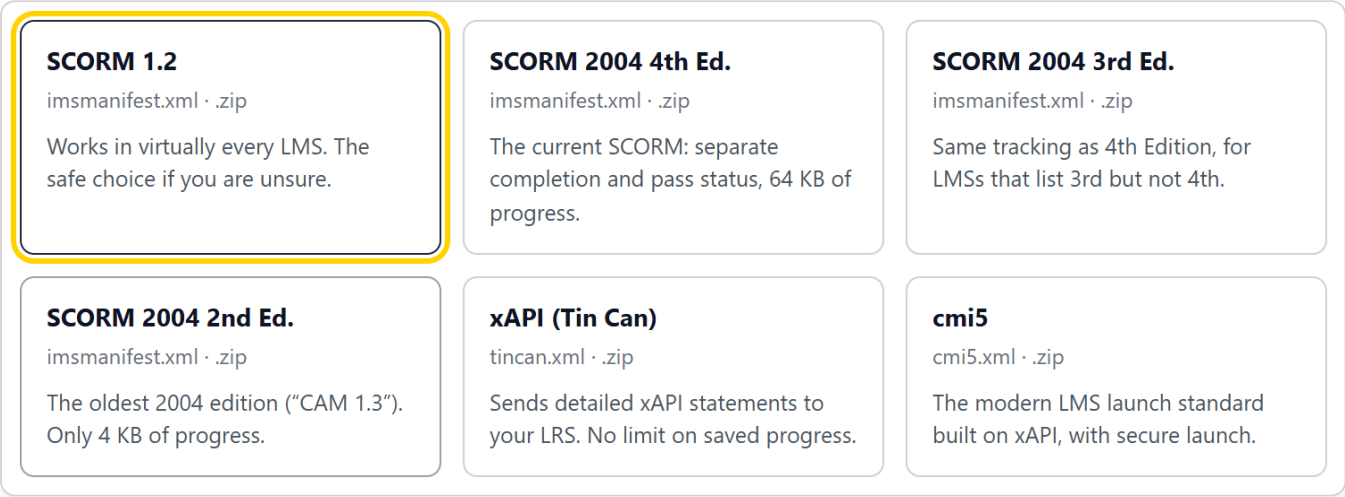


Animation, for animated PNG and WebP, video and the video guide: Time per step and Time per note.

SCORM tab at a glance

The SCORM tab turns the walkthrough into a course for your LMS: one .zip file that you upload as it is. Learners watch the walkthrough, then practise it from memory in three levels and earn certificates.

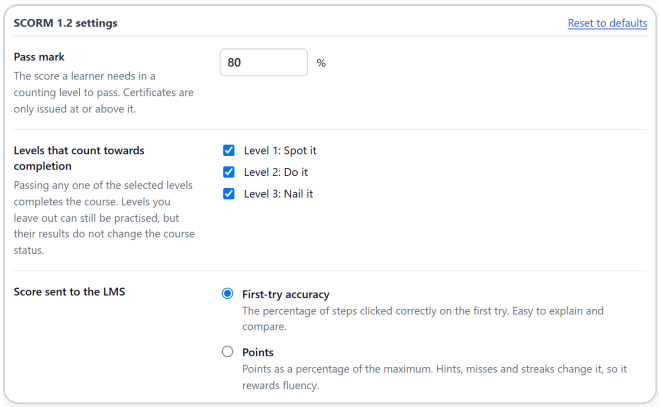
1. **Pick the format your LMS lists** Essential: SCORM 1.2 (works almost everywhere, the safe choice), SCORM 2004 4th, 3rd or 2nd Edition, xAPI or cmi5.
2. **Check the settings** under the cards. The defaults suit most courses.
3. **Build** the package and upload it to your LMS.



The six package formats. Choose the one your LMS lists.

The settings that decide who passes

Pass mark Essential	80 by default. A level passes, and a certificate is issued, at or above it.
Levels that count towards completion Essential	Passing any one ticked level completes the course. Tick only **Level 3: Nail it** when people must prove they can do the task without help.
Score sent to the LMS	**First-try accuracy** is easy to explain. **Points** also counts hints, misses and streaks.
Name on certificates	Locked to the learner's LMS account by default, so certificates can be trusted.
ID base	xAPI and cmi5 only. Replace the placeholder with an address on your organisation's domain before your first upload, and keep it.
Branding	The same switch as on the Files tab. A course carries the branding it was built with: build it again after changing your brand.



Pass mark, levels that count and the score: the settings that decide who passes.



xAPI and cmi5 only: replace the placeholder ID base before the first upload.

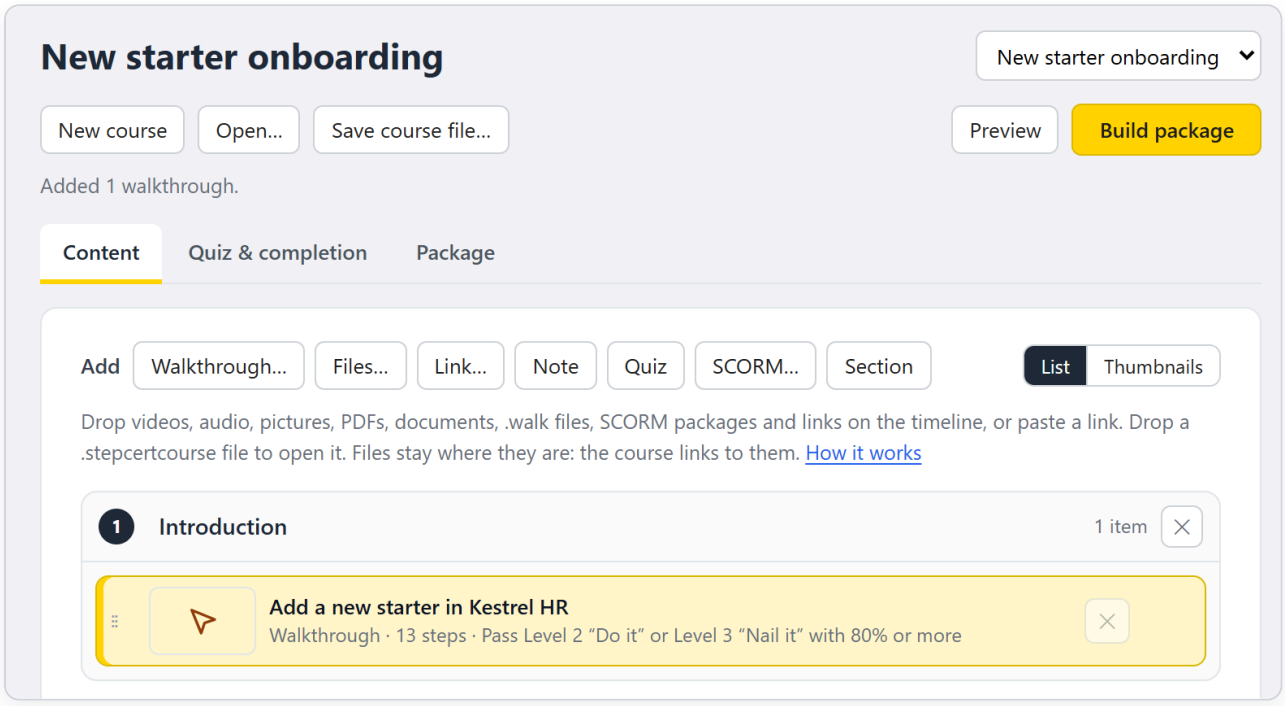
> **EXAMPLE**
>
> Compliance training: tick only Level 3, set the pass mark to 90 and send Points. A gentle introduction: keep all three levels, 80% and first-try accuracy, so passing Level 1 is enough.

Each walkthrough keeps one course ID, so a package you rebuild in the same format replaces the old one in your LMS and learners keep their results. More: **Which format should I choose?**, **Pass mark, counting levels and score**.

Course builder tab at a glance

The SCORM tab makes a course from **one** walkthrough. The Course builder makes a course from **several things**: walkthroughs, videos, recordings, pictures, PDFs, documents, links, note slides and quizzes, and SCORM packages you already have. Learners get one course with a menu, their progress and a certificate; your LMS gets one result. It works in Chrome and Edge.

1. **Content**: add the items and drag them into order. Group them into sections, which become the learner's course menu.
2. **Quiz & completion** Essential: pick the template closest to what you need. It decides what learners must do and what your LMS shows.
3. **Package**: pick the format your LMS lists, then **Preview** to try the course and **Build package** to save the .zip.



The Course builder with one walkthrough added. Content, Quiz & completion and Package are its three sections; the Add buttons put items on the timeline.

The things to get right

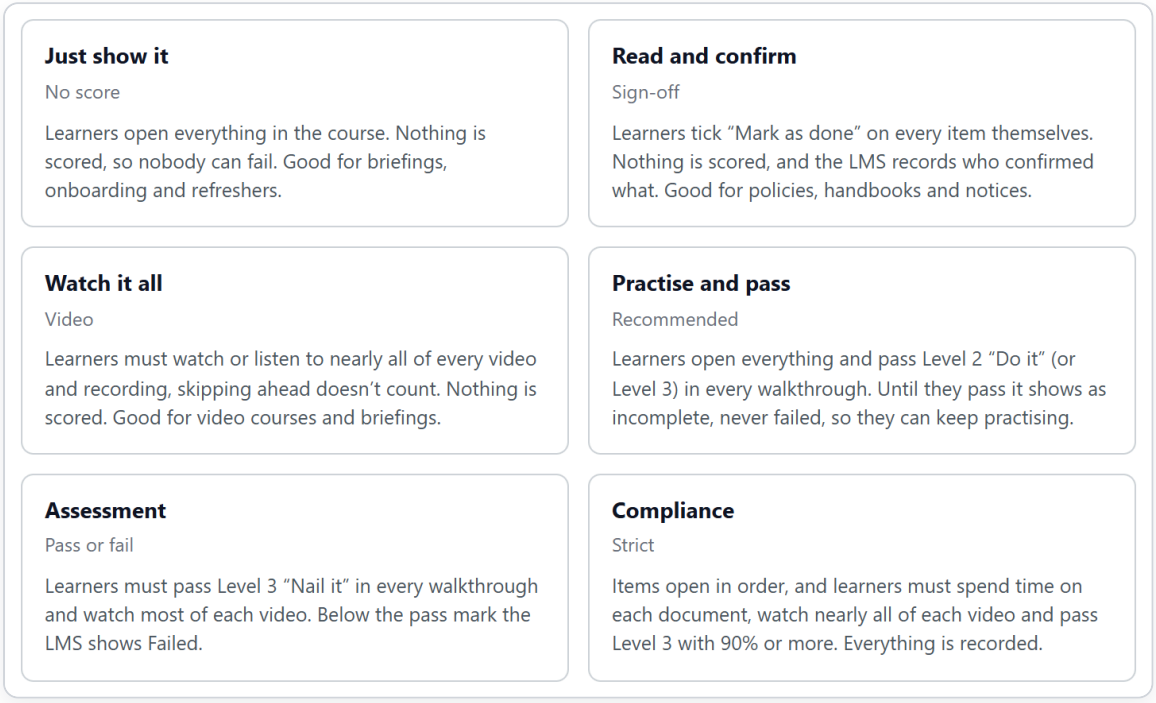
Course folder Essential

Your files are **linked, not copied**, and read again each time you preview or build. Keep a course's files in one folder and choose it under **Course folder** on the right: one permission then covers them all, and the course finds them on another computer.

Template Essential

Just show it (no score), **Read and confirm** (learners tick each item), **Watch it all** (videos played almost to the end), **Practise and pass** (the recommended one: every walkthrough and quiz at the pass mark), **Assessment** (a low result is reported as Failed) or **Compliance** (locked order and a higher pass mark). The yellow box says, in plain words, what learners must do.

Format	The same six as the SCORM tab. With several walkthroughs or an imported package, choose SCORM 2004 4th Edition, xAPI or cmi5 if your LMS lists one: SCORM 1.2 keeps only 4 KB of progress.
Captions and transcripts	Add a caption file (.vtt or .srt) to each video and a transcript to each recording. The checks on the right list any that are missing.
Checks	The list on the right says what must be fixed before a build (a missing file, an unfinished quiz question) and what is worth knowing (a big package, a video without captions).
Course file	**Save course file...** keeps the whole course in one .stepcertcourse file, with its walkthroughs. A settings template doesn't hold courses.



Quiz & completion: pick the template closest to what you need.

> Only SCORM 1.2 and SCORM 2004 packages can be imported into a course. xAPI, cmi5 and AICC packages are refused. You can still **build** your course as xAPI or cmi5.

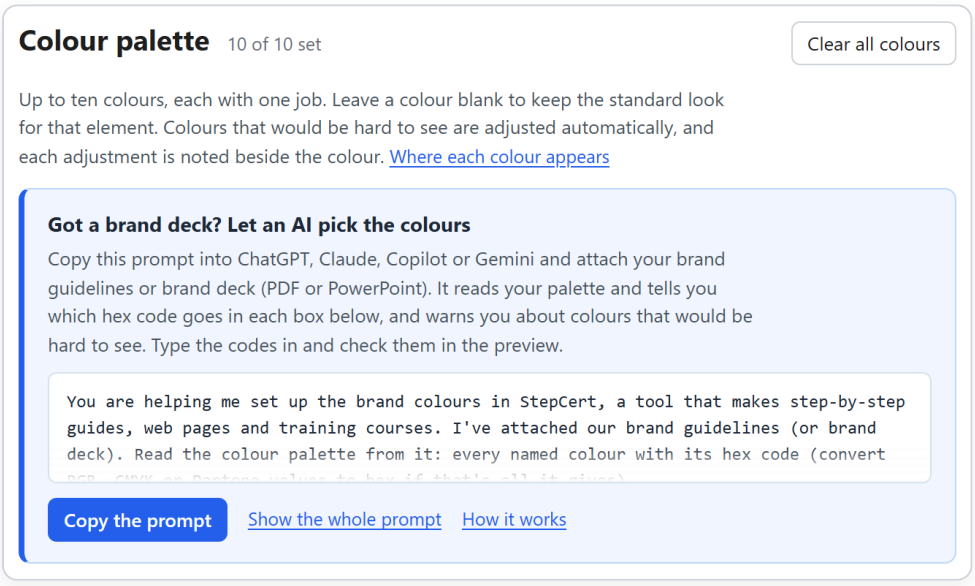
> **EXAMPLE**
> New starter onboarding: a welcome note, a five-minute video with captions, the walkthrough **Add a new starter**, the handbook as a PDF and a three-question quiz, in three sections. Template: **Practise and pass**. Format: SCORM 2004 4th Edition.

More in the Help tab: **How it works**, **Quiz & completion templates**, **Linked files and the course folder**, **Imported SCORM packages**.

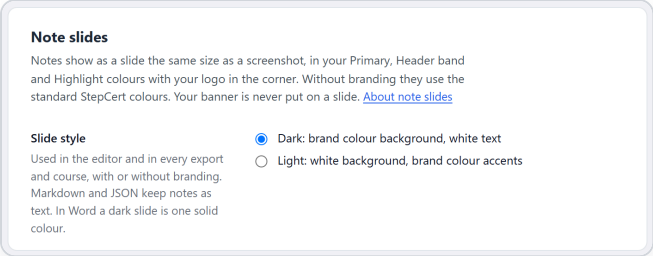
Branding tab at a glance

Set up your look once; every walkthrough uses it. Each part is optional, and the preview on the right shows the result as you go: a web page in light and dark mode, a Word page, and your note slides.

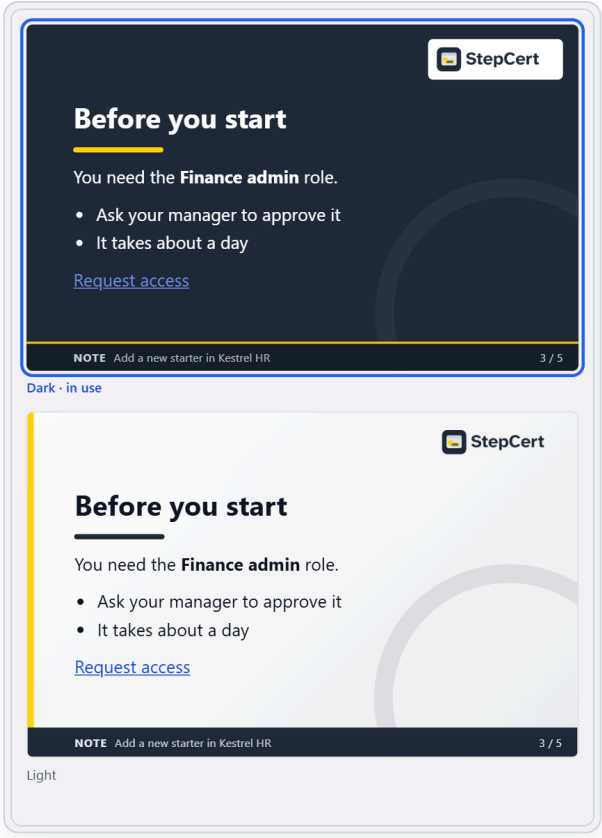
Banner	A wide image across the top of Word pages, web pages and courses. Between 4:1 and 8:1 works best.
Logo	On the title page, in the web page header, on the corner of every note slide and on certificates. Add your **Organisation name** too: it is the logo's alt text and the course's tab title.
Colour palette	Up to ten colours, each with one job, such as Primary for heading bars or Header band behind the logo. Text always stays black, and colours that would be hard to read are adjusted. Three to five colours are plenty. Got a brand deck? **Copy the prompt** in the blue panel, paste it into an AI assistant with your brand guidelines, and it tells you which code goes in each box.
Note slides	Every note is shown as a slide the size of a screenshot. **Dark** (the default) fades from your Primary to your Header band colour, with white text. **Light** is white, with a Highlight bar and a Primary rule. It is used in the editor and in every output except Markdown and JSON, which keep notes as text.
Screenshot colours	Off by default, so screenshots keep the standard yellow box. Turn on **Use Highlight and Redaction on screenshots** only if your highlight colour is as bright as yellow, orange, lime or cyan.



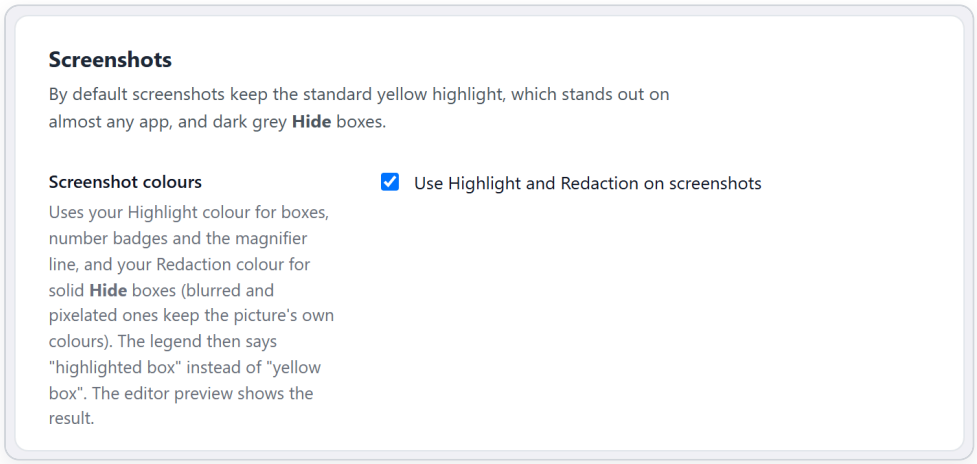
The colour prompt. Copy it into an AI assistant with your brand guidelines attached.



Note slides: Dark or Light.



The Note slides preview, with your colours and logo. The outlined style is in use.



Screenshot colours: off by default, so screenshots keep the standard yellow.

> Branding belongs to this browser, not to the walkthrough: a .walk file doesn't carry it. To give a colleague your look, or to move it to another computer, save a **settings template** on the Files tab.

> **EXAMPLE**
> Your logo is white on transparent. Set **Header band** to your navy, and the logo sits on navy in every header, on dark note slides and on certificates, instead of on a grey backing.

More in the Help tab: **The colour palette**, **Let an AI pick your colours**, **Note slides**.

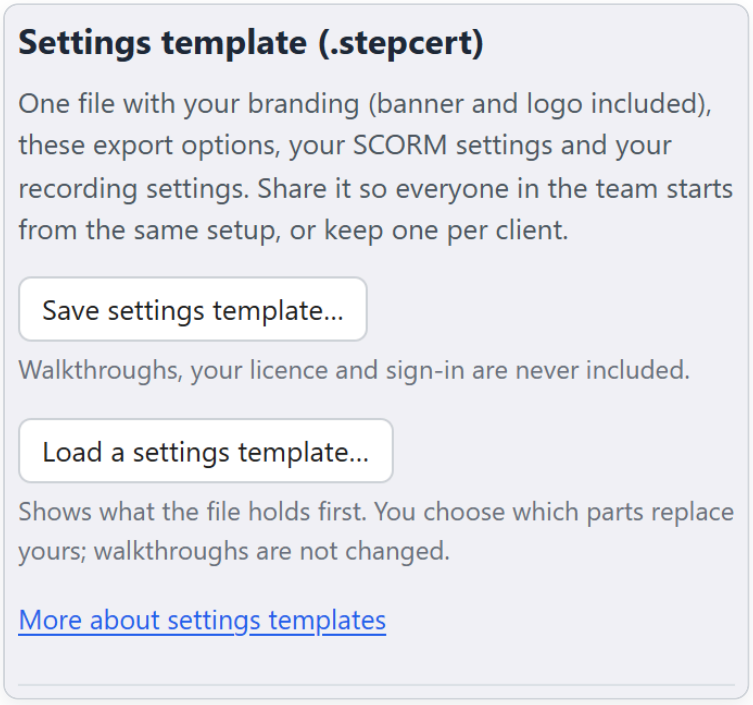
Keep and share your setup

A **settings template** (.stepcert, on the Files tab) holds your branding (with the banner and logo inside), your export options, all your SCORM settings, your recording settings and how long messages stay. It never holds walkthroughs, courses, your licence or your sign-in. A course from the Course builder travels in its own .stepcertcourse file.

- **For a team**: one person sets everything up and saves the template on a shared drive. Everyone else loads it once.
- **For a consultant**: keep one template per client and load the right one before you export.
- **For yourself**: save one before you change your branding, so you can go back.

When you load a template, StepCert shows what it holds and lets you untick the parts you want to keep as they are. Loading can't be undone, so the dialog offers **Save my current settings first**.

More in the Help tab: **Settings templates**.



On the Files tab: save or load a settings template.

Find out more

Every setting has a full topic in the editor's **Help** tab, with examples. Use the search box to jump straight to one, such as “pass mark”, “logo” or “result”.

The tutorial **Getting started with StepCert** walks through a first recording, from the side panel to a branded web page and a SCORM course: **stepcert.com/#tutorial**.

Questions: **stepcert.com**.