TechSmith®

Snagit® 12
Creating Process Documentation

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Introduction

Process documentation walks users through a series steps to complete a task or process. Create and share process documentation to help train employees, serve as a reference for infrequently used processes, assist in establishing norms for how to complete a process within a team, or to provide troubleshooting.
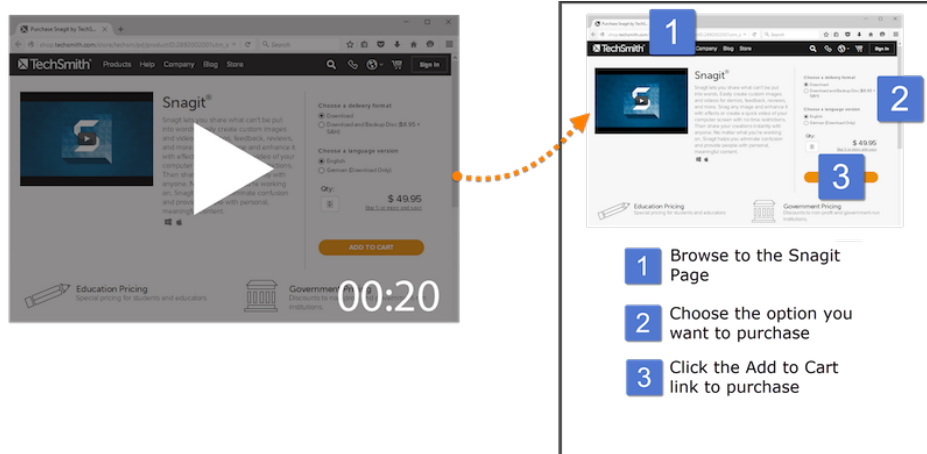
Use Snagit to record the process, grab screenshots from the video to include in the printed or online process documentation, and add steps or other graphics to call out important areas in the process graphics.

This guide describes how to use some of the tools in Snagit to create process documentation:
- Create Graphics from a Video Capture
- Trim Out the Unwanted Portions
- Add Steps to a Graphic
- Call Out Important Areas in a Graphic
- Insert Graphics into Your Documentation

Create Graphics from a Video Capture

With Snagit, you can record the entire process up front and then quickly save a series of still images from the video capture to use as graphics for process documentation. Recording a video while completing the process saves time and prevents you from having to remember the steps at a later time.

1. After recording a video, the video capture preview appears in Snagit Editor. To learn how to record a video using Snagit, see Taking Your First Video Capture.

2. Drag the cursor over the timeline until you reach the desired video frame to use as the graphic for the process documentation.
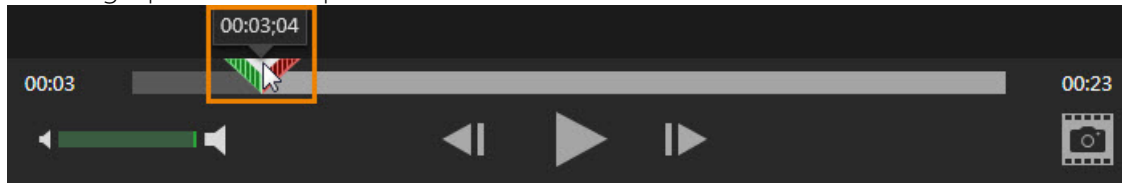

3. Click the Capture Frame button.

The captured frame is added to the front of the Open Captures Tray.

Trim Out the Unwanted Portions

Including a graphic helps users understand and visualize each step of the process. You may want to trim out the unnecessary portions in the graphic to focus reader's attention on the important action within the process.

To remove the unwanted parts of the graphic, drag a handle on the edge of the capture on the canvas.
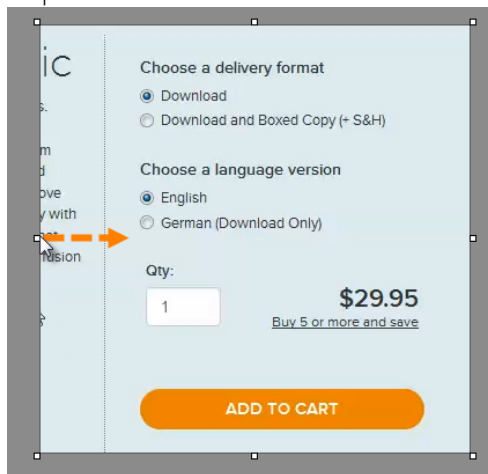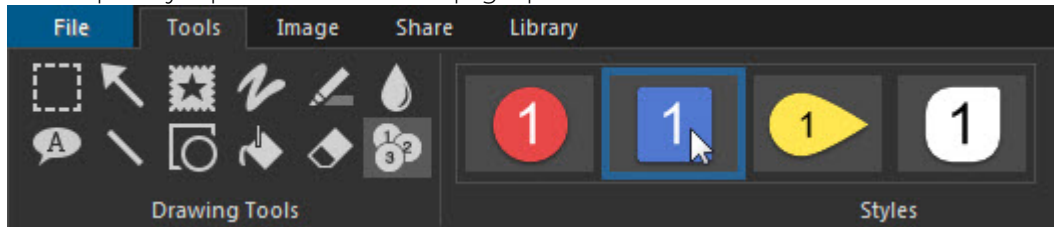

Add Steps to a Graphic

The Step tool adds incremental numbers or letters stamps onto an image.

1. Select Snagit Editor > Tools tab > Step tool.

2. Select a style from the Styles Gallery or select the Outline, Shape, Fill, Shadow, and Opacity options for the step graphic.

3. Move the cursor to the desired location on the canvas and click the mouse to add the step.
4. The cursor icon shows the next step number or letter in the sequence. Repeat step 3 until all steps are added to the capture.
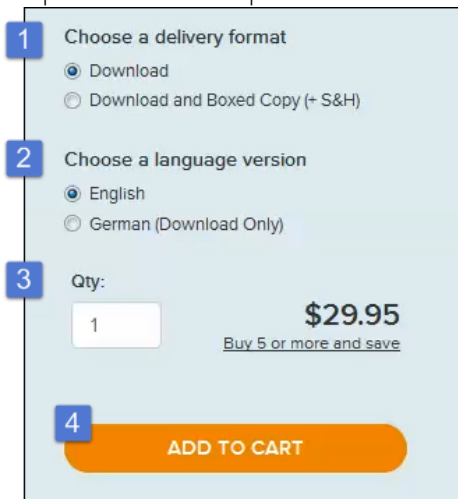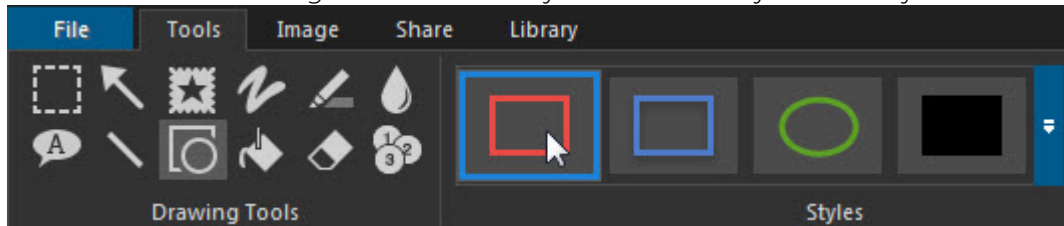

Call Out Important Areas in a Graphic

To draw attention to the action a user should take within each step of the process, add a rectangle frame, arrow, or callout to the graphic.

Add a Frame:

1. Select Snagit Editor > Tools tab > Shape tool.

2. Select the red rectangle or another style from the Styles Gallery.
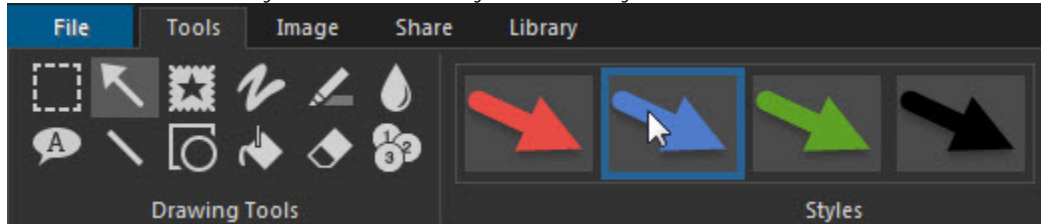

3. Click and drag the cursor on the canvas to draw the shape.

Add an Arrow:

1. Select Snagit Editor > Tools tab > Arrow tool.

2. Select an arrow style from the Styles Gallery.

3. Click and drag the cursor on the canvas to draw the arrow.

Add a Callout:

1. Select Snagit Editor > Tools tab > Callout tool.

2. Select a callout style from the Styles Gallery.

3. Click and drag the cursor on the canvas to draw a callout.
4. Enter text.

Insert Graphics into Your Documentation

1. Move your cursor to where you want to insert the graphic in an open Microsoft Word document.
2. Click to select the graphic to share in the Open Captures Tray.
3. On the Share tab, click the Word output button.

The capture is added to the cursor's location in the open Microsoft Word document.