



User guide

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Everything Knowledge Capture does, in one place.

1. Getting familiar

Knowledge Capture turns what your people know into a searchable knowledge base and ready-to-use training. The flow is always the same: someone records or uploads a walkthrough, it's transcribed automatically, and from there you can turn it into a training module.

The main areas, in the header and sidebar, are:

Page	What it's for
Dashboard	A quick overview: recordings captured, minutes of knowledge, training modules, and your most recent recordings.
Recordings	Record with your microphone or upload an audio file.
Knowledge base	Every recording, searchable, with two views: a flat List and a Business → Department → Program → Module Folders view.
Training Library	Training programs and the modules built from your recordings.
Business settings	Appearance branding and business details (signed-in users only).



You don't need an account to look around. Pick a sample business from the switcher in the header and browse everything with realistic sample data.

2. Signing in / sign up

As a guest, you can browse the whole app with sample data — the business switcher in the header lets you flip between a few sample businesses. The moment you try to do something that needs an account (recording, saving, editing), a sign-in dialog opens automatically and resumes your action as soon as you're signed in.

From the auth page you can create an account with an email and password, sign in with Google, or switch between the two with the link at the bottom of the form.

- Creating an account automatically creates a workspace (a business) for you, and makes you its first member.
- Signing in resumes whatever you were doing — for example, clicking "Record knowledge" as a guest opens the sign-in dialog, and once you're signed in it takes you straight back to recording.

 New accounts need to confirm their email before the session becomes active, depending on your project's settings. If sign-in seems to silently do nothing, check your inbox.

3. Choosing a category for your business

Your business has a category (industry) — things like Manufacturing, Healthcare, or Technology — shown on your business card and used to give sample content a bit of context. You can set or change it from Business settings.

1. Open Business settings from the sidebar (visible once you're signed in).
2. Find the "Business category" field and type your category.
3. Click Save.

 This is a free-text field, not a fixed list — use whatever description fits your business best.

4. Making it yours: hero image, title and colours

The landing page and the rest of the app can be branded per business. Open the Appearance panel from the gear icon that appears in the top-right of the landing page's hero image on hover, or from the gear icon in the header (next to the "?" icon), or from Business settings → Appearance.

- Hero image — upload your own (JPG, PNG or WEBP, 1200×800 or larger recommended) or pick one of the built-in images. You get a live preview before saving, and a "Reset to default" option.
- Hero text — the badge above the title, the title itself, and the subtitle underneath all edit and save independently, and update the landing page immediately.

- Colour scheme — pick one of eight preset accent colours, or enter your own hex code. The colour updates buttons, badges, links and active navigation states everywhere in the app, in both light and dark mode.

 Appearance changes apply only to your business. Signed-out visitors see the appearance of whichever demo business is currently selected in the switcher.

5. Capturing knowledge

Go to Recordings. There are two ways to capture a walkthrough, side by side on the same page.

- Record — tap the microphone button, talk through what you know, tap again to stop. Give it a title and (optionally) a topic before saving.
- Upload a file — drag and drop, or choose a file. Accepted formats: MP3, M4A, WAV, WEBM, MP4, AAC. You'll see the filename, size and duration before uploading, plus a progress bar while it uploads.

Above both options there's a single destination picker — choose a program (or leave it as "No program") and you'll see exactly where the recording will be filed, updating live as you choose. Once saved, a confirmation shows where it landed, with links to view it in the Knowledge base or open the recording directly.

 Recording needs microphone permission from your browser. If the record button doesn't do anything, check your browser's site permissions.

6. Where recordings are stored

Every recording is filed in a four-level hierarchy: Business → Department → Program → Module. A recording without a program is simply "Unassigned" until you move it — nothing is lost, it's just easier to find once it's placed.

Audio files are private. They're stored in a private bucket and only ever served through short-lived signed URLs — never a public link. You can only read a recording that belongs to a business you're a member of.

To see the whole structure at a glance, open Knowledge base and switch to the Folders view (it's the default) — it shows every business, department, program and the recordings inside, all collapsible.

7. What you get back: three outputs

Once a recording finishes transcribing, you get three distinct outputs, and the first is never overwritten by the others:

Output	What it is
Raw transcript	The verbatim transcript, timestamped, exactly as spoken — filler words, false starts and all.
Clean transcript	The same content with filler words, false starts and repetition removed and sentences repaired — meaning and order unchanged.
Training plan	A structured plan generated from the clean transcript: overview, learning objectives, prerequisites, sections, procedures, common mistakes, glossary and a quiz.

The recording page shows the raw and clean transcripts as soon as they're ready. The training plan is a separate step — open "Training plan" from the recording page and click "Generate training plan."

8. Building training modules

In the Training Library, click "Create module" and give it a title and description — nothing else is required. It starts in "Awaiting recording" status, and from there you have three ways to give it content, and you can use any of them, in any order:

- Record directly into it — opens the recorder with the module already set as the destination.
- Upload a file into it — same page, upload instead of record.
- Attach an existing recording — pick from your own already-transcribed recordings that aren't attached to a module yet.

Once audio arrives, the module transcribes and its content generates automatically, the same as any recording. Modules belonging to a program can be grouped into named

sections (call them "Lessons," "Steps," whatever fits) on the program's page — sections are renameable, reorderable, and modules can be moved between them. Each module shows as a collapsible row: order, title, duration, status and a chevron, with Expand all / Collapse all above the list.

 A section can only be deleted while it's empty — move or remove its modules first.

9. Reviewing and editing the training plan

Every field on a training plan is editable in place. Title and description sit at the top; overview, learning objectives, prerequisites and estimated duration are grouped together below; then sections, procedures, common mistakes, glossary and quiz each get their own list.

- Each item in a list has its own Edit and Save buttons — saving one item never touches anything else on the page.
- Add, delete and reorder items freely within each list.
- An "Unsaved changes" indicator appears while something is being edited, and you'll be warned before navigating away with changes pending.
- The page shows when the plan was last edited.

10. Download, improve, re-upload

Click "Download plan" to export the whole training plan as a Markdown file, with fixed headings for Title, Description, Overview, Learning Objectives, Prerequisites, Sections, Procedures, Common Mistakes, Glossary and Quiz. Edit it in any text editor — reorder, rewrite, hand it to someone else to review.

When you're ready, click "Upload plan" and bring the file back in (or paste text directly). If the headings still match the export format, it's parsed directly; if they don't, the text is sent to the model to map it into the same fields. Either way, before anything is written you'll see exactly which fields will change, and you confirm before it applies.

- Fields not present in the upload are left untouched.
- The previous version is kept, so a bad import can be reverted with one click.

11. Worked example 1: setting up a new project

A complete, ready-made example: an office manager talks through how she takes a new project from arrival to a working team, with a timeline and clear ownership. It shows every part of a finished training plan — objectives, sections, a procedure, common mistakes, glossary and quiz — and every field has working Edit/Save controls so you can try editing without affecting anything real.

Setting up a new project

Northgate Logistics · Operations — intake to first check-in.

[Open this example](#) →

12. Worked example 2: a shop-floor work instruction

A second example, written as a work instruction rather than a discussion: a line supervisor walks through setting up an assembly station, from an empty bench to the first approved part, weighted towards procedures and safety checks rather than open-ended discussion.

Setting up an assembly station

Halstead Manufacturing · Production — empty bench to first good part.

[Open this example](#) →

13. Quick reference

Page	URL
Dashboard	/dashboard
Recordings	/record
Knowledge base	/knowledge
Training Library	/training
Business settings	/business/settings
This guide	/guide

Accepted upload formats

MP3

M4A

WAV

WEBM

MP4

AAC

Term	Meaning
Raw transcript	Verbatim, timestamped transcript — never overwritten.
Clean transcript	Filler and false starts removed, meaning unchanged.
Training plan	The structured plan generated from the clean transcript.
Awaiting recording	A module that's been created but has no audio yet.
Unassigned	A recording or module with no program set yet.

14. If something goes wrong

Symptom	What to check
The record button does nothing	Your browser is blocking microphone access for this site — check its site permissions and reload.
A recording says "Transcribing" for a long time	This page updates automatically when it's done — no need to refresh. If it stays that way, the recording may have failed to process; try re-uploading it.
My upload was rejected	Only MP3, M4A, WAV, WEBM, MP4 and AAC are accepted — convert the file first if it's in another format.
I can't see a teammate's recording	You need to be a member of the same business. Ownership of the recording itself (editing, deleting) stays with whoever created it.
An import didn't change what I expected	Only fields actually found in the uploaded text are changed — anything missing is left as it was. Check the before/after list shown before you confirmed the import.

Symptom	What to check
I lost an edit I was in the middle of	Leaving a training plan page with unsaved changes shows a warning first — if you saw and dismissed it, the changes were discarded on purpose.
None of this touches your audio recordings — the recorder and transcription pipeline stay the same regardless of any other changes in the app.	

Knowledge Capture

Turn the expertise your people carry in their heads into a searchable knowledge base and ready-to-use training.

Viewing sample workspace

Bellweather Dental
Healthcare

A four-surgery dental practice with a busy front desk and a growing hygiene team.

Product

- Dashboard
- Recordings
- Knowledge base
- Training

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