

Captured flow reference

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Available actions

States and actions

A recorded walkthrough can be inspected, edited, replayed as a walkthrough, turned into a draft manual document, or removed from the selected project.

The enterprise destination follows operational, analytics, screenshot, and video work. It uses the project selected in the header and shows either an empty state or actions for each recorded flow.

If you need to...	Go to
Check the selected project's list	Find a flow
Get material for recording a walkthrough	Prepare recorder material
Change captions, order, or redactions	Edit steps and screenshots
Preview or embed a walkthrough	Preview a walkthrough
Create a draft manual document or remove a flow	Generate a draft or remove a flow

Before you start

Prerequisites

Have this ready	Why it matters
A project selected in the header	The destination uses the current project when it loads the flow list.
A saved flow	The row actions appear for a recorded flow; an empty project shows No recorded flows yet.

Have this ready	Why it matters
No unsaved step edits	Re-shoot and Localize require the current step list to be saved first.
At least one step in the flow	The flow must keep at least one step when you edit its steps.

When no project is selected, the page displays **No project selected** and the message

The project dropdown in the header sets the project for every enterprise surface. It also provides the instruction Select a project from the header dropdown to record and manage walkthrough flows.

Find and recognize a flow

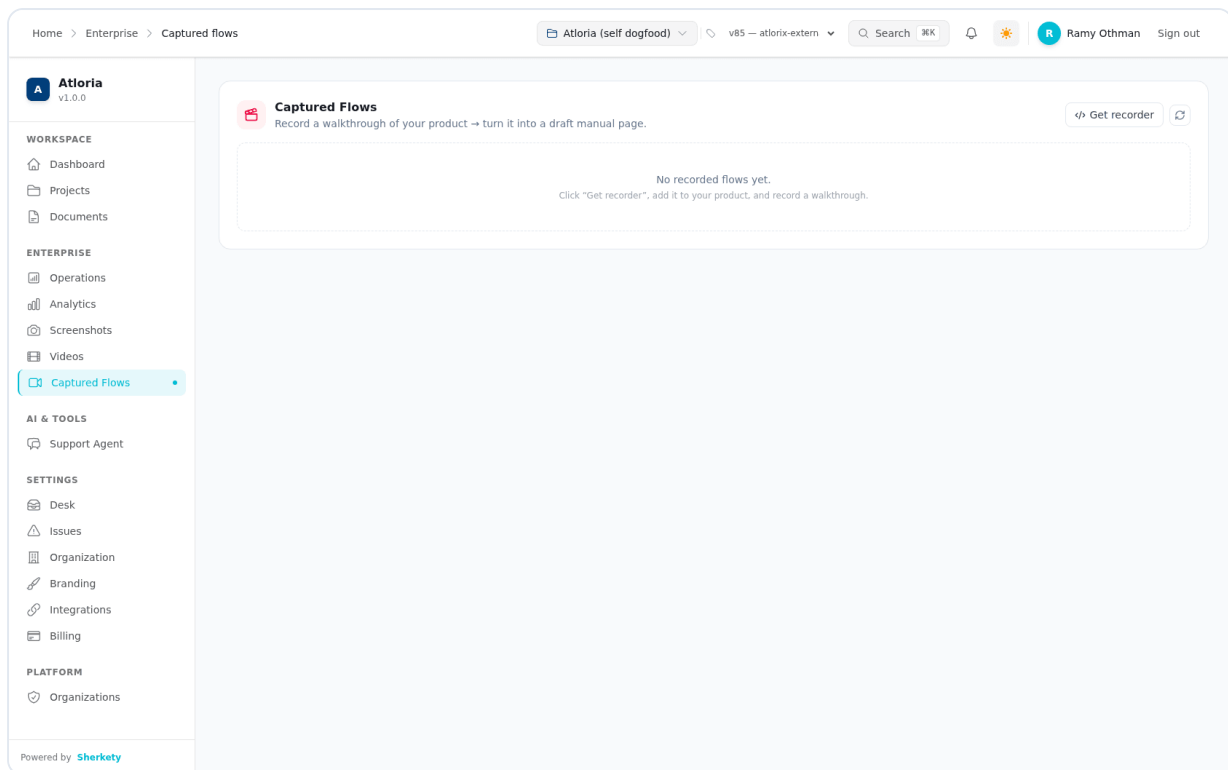
A flow summary identifies a recorded walkthrough before you choose an action. The summary carries the flow name, its starting URL, and its step count.

Prerequisites

- Have access to the application.
- Select a project in the header.

Steps

1. Select **Captured Flows** from the enterprise navigation.
2. Select **Refresh** to reload the selected project's flow list.
3. Read the flow name, starting URL, and step count when a flow row is present.
4. Read No recorded flows yet. when the selected project has no recorded flows.



While the list is loading, the page displays `Loading recorded flows...`.

Result: The page shows either a flow summary, ready for the actions below, or `No recorded flows yet.`, ready for recorder setup.

Prepare recorder material

The recorder material lets you add Atloria's recorder to the product you want to walk through.

Opening this panel does not change a recorded flow.

Prerequisites

- Have a project selected.
- Open **Captured Flows** from the enterprise navigation.

Steps

1. Select **Get recorder**.
2. Read the generated script tag in the recorder panel.
3. Select **Copy** to copy the script tag.
4. Drag **Atloria Recorder** to the browser bookmarks bar when you want to use the bookmarklet.

Result: The recorder panel remains open with the script tag and the draggable **Atloria**

Recorder link available. When a saved flow is available, continue with the flow action you need.

Edit steps and screenshots

The step editor is the place to refine a saved flow before you use its steps in a walkthrough or draft. It lets you change captions and order, mark image regions for redaction, re-shoot a step, and create localized screenshots.

Prerequisites

- Have a recorded flow row available.
- Keep the flow at one or more steps; the editor cannot save an empty step list.
- Save edits before selecting **Re-shoot** or **Localize**.

Steps

1. Select **Edit steps** on the recorded flow.
2. Enter the wording for a step in its caption field.
3. Choose one step-list action:

If you need to...	Select
Move the step earlier in the list	Move up
Move the step later in the list	Move down
Open the redaction editor	Redact

4. Drag across the screenshot to add a redaction region.
5. Select an existing redaction region to remove it.
6. Select **Save changes**.
7. Choose one saved-flow action:

If you need to...	Select
Request screenshots for one or more locales	Localize

If you need to...	Select
Recapture one step screenshot	Re-shoot
Leave the step editor	Close editor

Enter one or more comma-separated locale values before selecting **Localize**.

Select

Re-shoot only after saving the current edits.

Result: The step editor shows the saved order, captions, and redaction choices; a successful

save displays Saved. Re-generate the draft to pick up the new order and captions.

Preview a walkthrough

A walkthrough is an in-product guided tour. Use the walkthrough panel to preview it on the current page or copy the embed snippet for a product page.

Prerequisites

- Have a recorded flow row available.
- Keep the flow's step list saved before starting the preview.

Steps

1. Select **Walkthrough** on the recorded flow.
2. Select **Preview tour**.
3. Select **Stop** when you finish checking the preview.
4. Select **Copy** in the walkthrough panel to copy the tour embed snippet.

Result: The walkthrough panel shows the interactive-tour controls; **Stop** is shown while

the preview is active, and **Preview tour** is shown when it is not active.

Generate a draft or remove a flow

These choices have different outcomes: generating a draft creates a draft manual document, while

deleting removes it after confirmation.

Prerequisites

- Have a recorded flow row available.
- Choose the action that matches your intended outcome before selecting the control.

Steps

1. Choose one outcome:

If you need to...	Select
Keep the flow and create a manual draft	Generate draft page
Remove the recorded flow	Delete

2. Open [Documents overview](#) when you selected **Generate draft page**.
3. Check the confirmation `Delete this recorded flow?` when you selected **Delete**.

Result: Draft generation leaves a draft document in the documents area; deletion removes the recorded flow after the confirmation step.

When an action fails

Use the exact message on screen to choose the corrective action.

What you see	What it means	What to do
No project selected	The destination has no current project.	Select a project from the header dropdown.
The project dropdown in the header sets the project for every enterprise surface.	The destination needs a project selected in the header.	Select a project from the header dropdown, then open Captured Flows .
Loading recorded flows...	The selected project's flow list is loading.	Wait for the list to finish loading, then select Refresh if the list does not appear.
Delete this recorded flow?	The destination is asking you to confirm flow deletion.	Confirm only when you intend to remove the recorded flow.
Flow not found	The selected flow is no longer available.	Return to Captured Flows and select Refresh .
You do not have access to this project	The selected project is not available to you.	Select a project you can access, then open Captured Flows .

What you see	What it means	What to do
A flow must keep at least one step.	The step list is empty.	Keep at least one step, then select Save changes .
Save your edits before re-shooting so the recipe matches.	The step list has unsaved edits.	Select Save changes , then select Re-shoot .
Save your edits before localizing.	The step list has unsaved edits.	Select Save changes , then select Localize .
Enter at least one locale (e.g. fr-FR, ar-SA).	The locale field contains no usable value.	Enter at least one locale, then select Localize .

The destination also displays **Saved**. Re-generate the draft to pick up the new order and captions.

after a successful step-list save.

What happens next

After you review or refine a flow, choose the next action based on the outcome you need.

If you need to...	Continue with...
Refine the recorded steps	Edit steps , then Save changes
Check the flow as a guided tour	Walkthrough , then Preview tour
Put the flow into a manual draft	Generate draft page , then Documents overview
Delete the recording	Delete , then confirm Delete this recorded flow?