Guidelines, Tips, and Suggestions for Creating Effective Screencast Tutorials Using Camtasia Software

In both academic and public libraries, video tutorials are an increasingly popular form of instruction. They are fairly easy to produce and can address a wide range of topics.

The following are guidelines and tips for creating effective screencast tutorials; they are not detailed instructions.

**General Guidelines:**
What to Consider Before You Begin Recording

**Keep it short**
The Animated Tutorial Sharing Project (A.N.T.S.) recommends a maximum length of 3 minutes for a tutorial. Even 3 minutes may be too long for many topics. As A.N.T.S. points out “most patrons have little patience for prolonged instruction. Thus the tutorials need to be structured in such a way that they do the most good in the least amount of time.”

**Break large topics into smaller segments**
Do not try and do it all in one video, particularly if you have a large or complex topic. Break topics into several smaller tutorials. Users will not feel as intimidated or overwhelmed with a topic when it is subdivided into smaller segments.

**Sequencing**
Tutorials should begin with basic instruction and only then move on to a more advanced level. Alternatively, a topic can be divided into two separate tutorials.

**Accessibility guidelines**
Screencast videos benefit a wide variety of learners; users can pause a screencast tutorial in order to take notes, replay a section of it to understand it more fully, and review the entire video at a later date.

When you create a tutorial, remember that there are numerous types of learners, including those with disabilities. Your video should be accessible to everyone. The Web Accessibility Initiative – widely regarded as the international standard for web accessibility – has created guidelines for fair and easy access to information.
Government legislation is increasingly focusing on these guidelines, and will affect the way you create screencast tutorials in the future. In Ontario, for example, the Accessibility for Ontarians with Disabilities Act, highlights the importance of creating information in a variety of formats. You should already be considering text transcripts of the audio recording.

**Post the length of the video**
Make sure that users know the length of a screencast. People are hesitant to commit to an unspecified length of time.

**Be prepared to practice**
How often you practice will be key to the success of your videos. It takes practice to learn such aspects of the program as using the cursor correctly and narrating a screencast effectively.

**Be patient.**
It will take longer than you expect to create a short video, particularly in the beginning. Leave time for extra takes.

**Prepare the teaching strategy ahead**
To be effective, spend time considering the most effective way of presenting your information. Time spent at this stage will not be wasted. Think through the process of what you want to teach, and then organize it into a series of logical, sequential steps.

**Provide the context of a real search**
Database searches should be demonstrated within the context of a real search.

**Prepare a script**
To create a professional screencast, you should prepare a script ahead of time. This may consist of a simple outline of main points. If you write the script out word for word, do not sound as if you are reading it. You want to avoid sounding mechanical.

**Watch Camtasia videos before creating your own**
If you are new to Camtasia, spend ten minutes watching the videos on recording, editing, producing, and sharing. These videos are very practical and useful. When you open the program, the following pop-up screen will appear with links to the videos:
**Watch the “Show Me” tutorials**

All of the individual features in Camtasia have mini tutorials explaining them. If you want to know more about a feature, check the tutorial on it. Look for the “Show Me” link:

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**Recording Guidelines**

**Minimize browser toolbars and shortcuts; close extraneous applications**

Clean up your browser by closing or removing unnecessary toolbars and personalized shortcuts. You do not want to take up valuable screen space with nonessential items. Close applications that not pertinent to your screencast.

**Block pop-ups**

Make sure your browser’s built-in pop-up blocker is turned on. You do not want annoying pop-ups to appear while you are recording.
Have applications open
Before you start recording, open the applications you will use.

Use hotkeys
Use the F9 key to pause the recording, and the F10 key to stop it.

Branding
Start with your library’s logo to identify the institution and provide a consistent beginning for the tutorials.

Video size options
Video size can be controlled in several ways. When using Camtasia you have control over the recording (or input) size and the rendering (or output) size. In order to optimize the resolution and ultimately the readability of the video, the input and output sizes should be the same.

Recording size:
Set the recording window to 640 x 480. Set the area intended to be recorded to the same size. This optimizes the output resolution.

The recommendation is to set the recording window to 640 x 480; however, you can also record at a larger size, using the SmartFocus zoom option while editing for viewing finer details. Be aware that the resolution of the output window will be compromised if input size is significantly larger.

Rendering size:
Beginners:
The default will be set to “web” at 640 x 480; this setting is optimal. 640 x 480 is strongly recommended for the web output as this size will fit on most computer screens. Remember some people will be viewing the tutorial from smaller size laptop screens.

Advanced Users:
There are other options. Make sure the output size fits into the intended hosting application (e.g. website, blog, CD, iPod).
For additional details on recording, view the Camtasia tutorial, “Using the Improved Recorder.”

Also watch the tutorial called “Better Quality, Smaller File Size” for tips and suggestions on recording sizes.

**Begin the tutorial with an overview**
Start the video with a brief statement, outlining what will be covered in the tutorial. You might want to start with a title clip that clearly states what you will cover.

**Use the pause button**
Take advantage of the pause feature. Record a short segment; pause; collect your thoughts for the next segment; and proceed in this fashion. Working a scene at a time is much easier to do than trying to record a long, uninterrupted sequence.

**Practice using the mouse**
Cursor movements can appear jerky, hesitant, or too fast in the recording. To eliminate some of these problems, practice using the mouse around the screen in a slow, fluid motion.

**SmartFocus tips**
If you use SmartFocus, make sure that your cursor movements are slow. And for best results keep your cursor inside the area of recording. When you edit the video, you can adjust SmartFocus’s automatic zoom and pan feature. For example, you can slow down the movement or readjust the area of focus.

**Take advantage of animation options when recording**
Before recording, choose which animation options will optimize the impact of your video. Highlighting the cursor will create a yellow circular area around it. But make sure your cursor movements are smooth or it will draw attention to any jerky actions.

**Keyboard and cursor sounds**
Turning on the keyboard sounds is not recommended. Unlike the same feature in Captivate, the keyboard sounds in Camtasia sound clunky and distracting. On the other hand, selecting the mouse click sounds can be an effective way of highlighting
your movement and progression in a video. To choose animation options, click on “effects” before beginning to record:

Guidelines for Recording the Audio

Microphones
Generally, USB microphones provide more consistent sound quality than stand-alone microphones because they remain at a fixed distance from a speaker’s mouth.

Recording audio
Record in a quiet location, free from interruptions or background noise.

Audio narration
Try to sound relaxed but enthusiastic. Vary your intonation to avoid sounding monotonous or mechanical. Try not to speak too fast. Do not forget that what is obvious to you is new to your listeners. Users are not only hearing your lesson for the first time but also familiarizing themselves with the interface at the same time.

Test the microphone
Before recording, click on the audio options and make sure your device is selected. You will not want to discover later that your video has no sound. Say a few test words, making sure that the volume bar level moves up and down as you speak.
Test your voice
To make sure that you are talking at the right volume, you should click on the “audio set-up wizard” (found in the audio options link). Once you read a test sentence, the audio levels will automatically adjust to the sound of your voice.

Editing Guidelines
Make effective use of callouts
Callouts can be very effective in directing a user’s attention to a desired focal point. Before choosing a callout, become familiar with the various types:
Consistent callouts and captions that are visible
Consistent use of callout colours and fonts will create a unified effect. Choose a colour scheme that will stand out and be visible.

Provide time for users to read captions
Make sure that you leave enough time for users to read captions and callouts. Do not forget that they need time to familiarize themselves with the interface.

Use transitions sparingly and consistently
Slide transitions can be effective in unifying a video but they do increase file size significantly. There are a number of different transitions available – for example, fading or checkerboard transitions. To find the best one for your video, double click on individual transitions for previews. Consistent use of the same type of slide transition will produce a professional appearance.

Consistent use of title clips
Title clips are useful for highlighting points you want to make. Again be consistent in your choice of colours and formats.
Cutting and editing your video
Editing your video by cutting out unnecessary parts will produce a polished effect. For the best results, zoom in on the timeline. Click on the “+” sign (see the red box below). This action will create finer gradations of time, allowing for a more precise cut.

Guidelines for Rendering/Producing the Video

Include user controls in the video
Include user controls (play/pause/stop) in the finished screencast so that users can watch, pause, and review the video at their own speed.

Render and record in the same dimensions
Remember that you create the clearest videos and the lowest file sizes when you record, edit, and render them in the same size.

For Further Instruction

For instructions on the various features of Camtasia, go to http://video.techsmith.com/camtasia/5/edu/quickstart/enu/default.html

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- Record a PowerPoint Presentation
- Editing PowerPoint Recordings
- Produce PowerPoint Recordings

**Feature Focus**
- Custom Callouts
- Apply SmartFocus™
- Working with Still Images

**Producing & Sharing**
- How to Produce Video
- How to Share
- Create Better Quality, Smaller File Size Videos
- Producing an ExpressShow™ SWF or FLV
- Sharing Your ExpressShow™
- Producing Videos for the iPod and iPhone

**In-depth**
- Draw on the Screen While Recording (ScreenDraw)
- Saving PowerPoint Slides as Images
- Time-Lapse in Camtasia Recorder
- Clip Speed

**Customize TechSmith ExpressShow™...**
- Start and End Screens & About Box
- Table of Contents
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- HTML Template
- Embed an ExpressShow (SWF or FLV) on a Web Page

**Camtasia Theater**
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- Theater TOC Images
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