



# Customer Recording Videos Guide

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## TASK: Capturing and Submitting Lesson Videos

Your task is to capture and format all your video materials for the creation of your performance support lessons for your chosen product.

**IMPORTANT: You must use Camtasia Studio to record your videos—no exceptions.**

- Videos are captured while you demonstrate each step of a lesson for the selected product.
- PowerPoint presentations are used to introduce and explain concepts.
- Lesson audio should be either pre-recorded in accordance with the Recording Audio Guide or narrated as you perform the lesson steps.

See the *Lesson Planning Guide* for instructions on how to plan what you will say and do in your videos, as well as more information about creating demo or exercise files prior to recording.

**IMPORTANT: Realize that, as you are recording, everything that you show in the interface will be seen in the video! Be aware of displaying corporate or personal information that may be sensitive in nature!**

Strongly Recommended Best Practices:

**Set up a generic email** if your product requires an online sign-in and you *do not* want your personal or professional email to show in the video, such as “poweruser567@gmail.com”.

**Set up a generic folder structure** in your local system for any demo or exercise files that you will be accessing during the course of recording the lesson. Use folder names such as “my\_project”, and for file names, **use generic terms** that summarize the lesson objective. For example, if you are demonstrating how to create a new project, use “MyProject”.

**While it is possible to blur some sensitive information within the videos, this is a time-consuming post-production process that, if needed excessively, could result in additional production costs and delays in receiving your deliverables.**

## OUTCOME: A Comprehensive Lesson Video

The CADLearning Post-Production team helps ensure that the quality of your final videos reflects our high standards. If our producers watch a video and determine that it does not meet those standards, you will be asked to re-record your video, and possibly your audio as well. Reasons for this can include, but are not limited to:

- The interface does not reflect what is said in the narration.
- The functionality of the task does not match the step-by-step instructions within the narration.
- An aspect of the interface element in question does not match the narration, such as the color, location, and exact name of the element.
- A video is longer than 8 minutes.

Thoroughly double-checking and testing the functionality of your program before you start recording either your audio or your video will eliminate many of these problems.

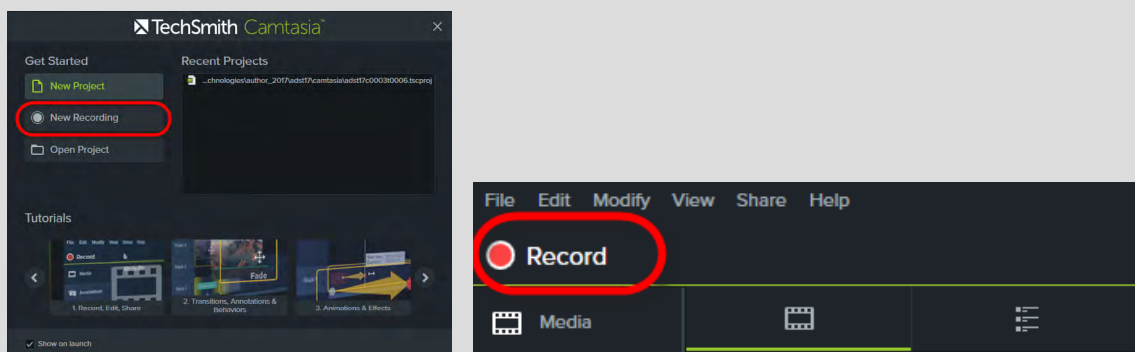
Once your video files have been uploaded and approved, the narration will be extracted and produced into the final format for inclusion in the product library.

## PROCEDURE: Recording Videos Using Camtasia Studio Recorder

All videos must be recorded using Camtasia Studio software from TechSmith Corporation. CADLearning can work with Camtasia Studio version 9 through 2018, and this guide is based on version 9.

You will use the Camtasia Studio Recorder to record your lesson videos. You can start the Camtasia Studio Recorder using one of the following methods:

- Click the **Record the screen** button located on the Camtasia Studio welcome screen.
- Click the **Record the screen** button located in the main Camtasia Studio window.



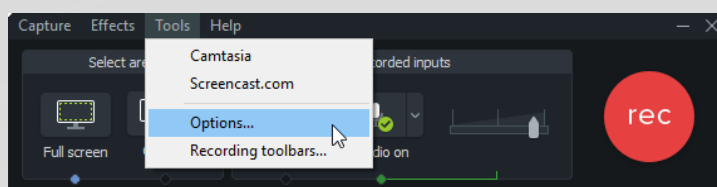
You can also start the Camtasia Studio Recorder from the TechSmith program group in the Windows Start menu.

Before you start recording, ensure that you configure the proper settings.

### Configuring Camtasia Studio: Recording Tools Options

The following instructions describe how to configure Camtasia Studio Recorder to properly record your lessons. Please be sure that your settings match those shown **exactly** to ensure that the videos you produce match the required settings.

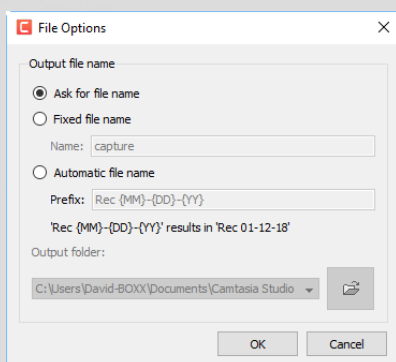
1. After you click **Record the screen...**, in the Camtasia Studio Recorder menu, select **Tools > Options** to display the **Tools Options** dialog.



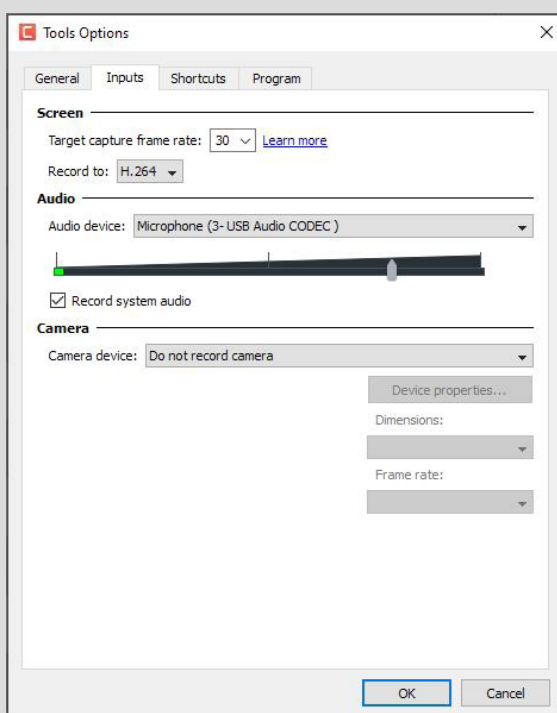
2. Next, click the **File options...** button to display the **File Options** dialog.
3. In the **File Options** dialog, under **Output folder**, specify the folder to which raw captured videos will be saved (the **/camtasia/raw** folder). Then, under **Output file name**, select **Ask for file name**. This ensures that Camtasia Studio will prompt you for a file name whenever you finish recording a lesson video. At that point, you will need to ensure that files adhere to the CADLearning file naming convention as described in *Welcome to CADLearning*.

You can use Camtasia Studio's automatic file naming mechanism if you wish, or even skip this step, as long as the resulting files are saved in the proper folder and the file names match the CADLearning file naming convention as outlined in the welcome document.

When finished, click **OK** to close this dialog.



4. On the Inputs tab, under Screen, expand the Record to: drop-down and select H.264.
5. Also on the **Inputs** tab, under **Audio**, for the **Audio device**, expand the drop-down and select your attached **Microphone**. This will record your narrative as you are capturing your video. (Note that if you are recording based on a pre-recorded audio, you would set this option to Do not record microphone instead.)

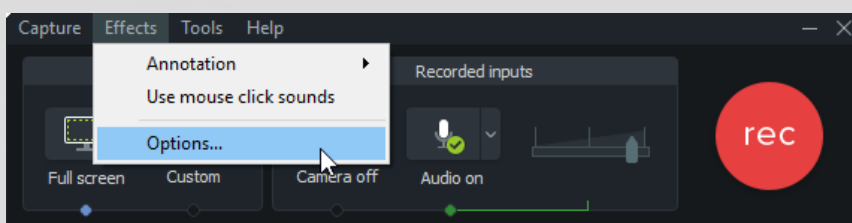


6. Review the Hotkeys settings on the **Hotkeys** tab. Typically, pressing **F9** starts the Camtasia Studio recording or pauses the recording. Pressing **F10** stops the recording. You can reassign key combinations, if necessary.
7. Click **OK** to close the **Tools Options** dialog.

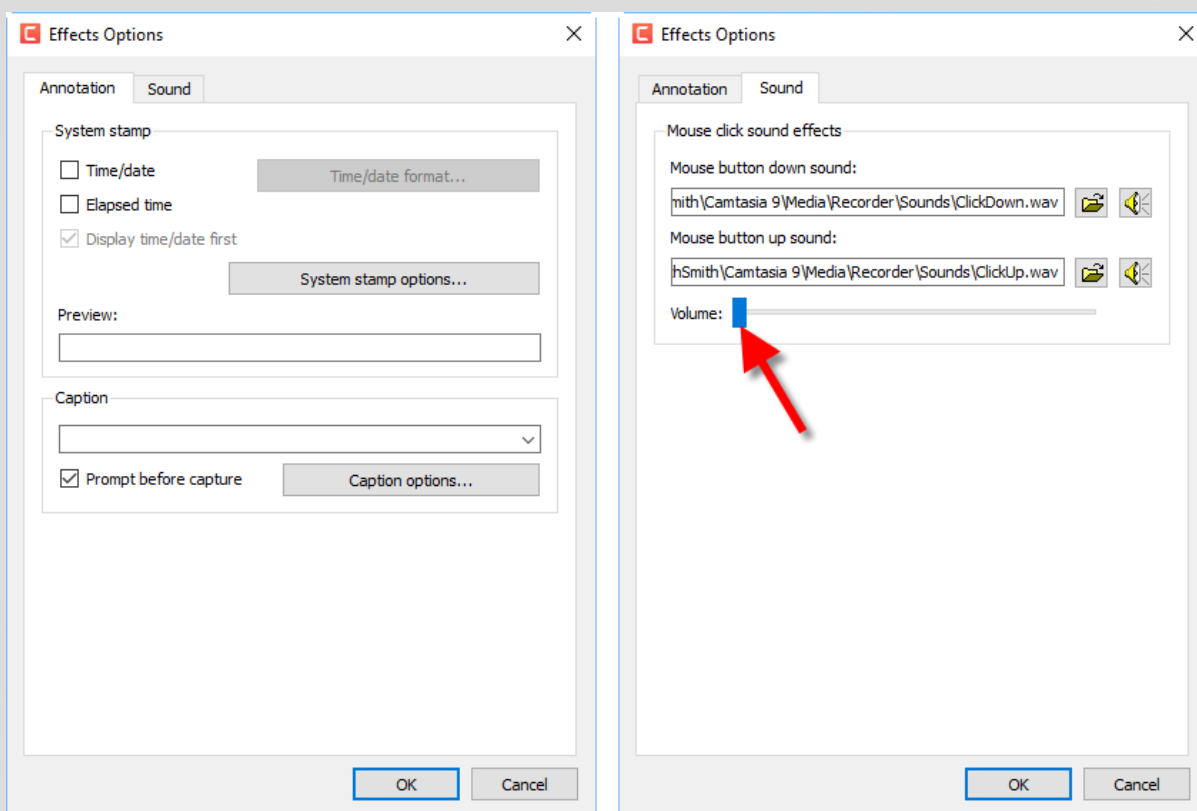
## Configuring Camtasia Studio: Recording Effects Options

The following instructions describe how to configure various Camtasia Studio Recorder effects to properly record your lessons. Please be sure that your settings match those shown exactly, to ensure that the videos you produce match the required settings.

1. In the Camtasia Studio Recorder menu, select **Effects > Options** to display the **Effects Options** dialog.



2. On the **Annotation** tab of the **Effects Options** dialog, make sure that none of the available options are selected. Do not include system stamps or captions as part of your captured videos.



3. On the **Sound** tab of the **Effects Options** dialog, drag the Volume slider all the way to the left so that you do not record the sound of mouse clicks.
4. Click **OK** to close the Effects Options dialog.

### Configuring the Size of the Video Capture

The captured video window must measure **exactly 1920x1080!** Since you will be recording a display that has been configured to display at a resolution of 1920x1080, all captured video must adhere to this requirement.

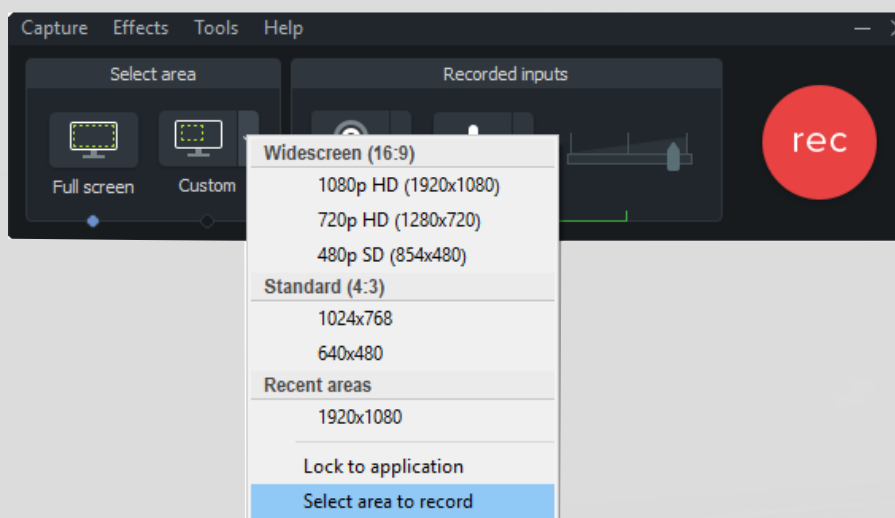
Use the following steps to ensure the size of the video capture window.

#### To capture just the application window (typical):

1. **Start the application** you will be teaching (such as AutoCAD).
2. Move the application to the second display (with a resolution of 1920x1080) and maximize the application so that it fills that display.

**IMPORTANT:** Hide the task bar on the second display, unless you are recording a lesson that actually involves the use of the task bar.

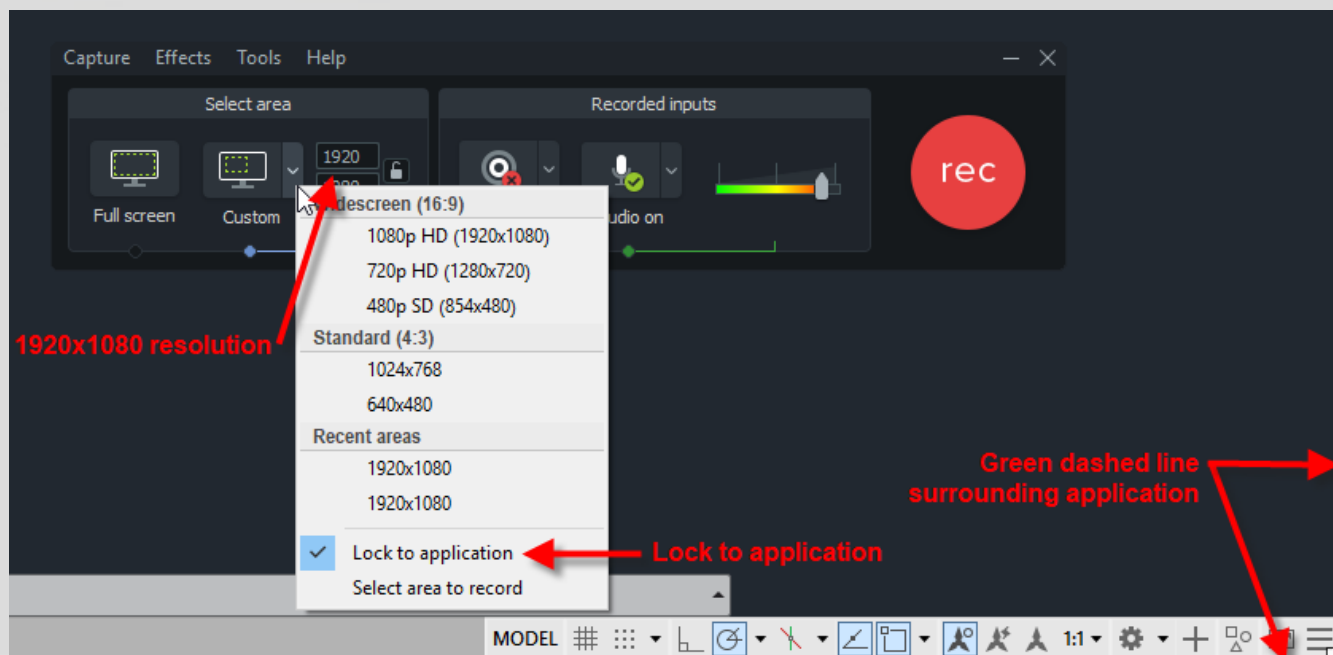
3. In the **Camtasia Studio recorder** panel, expand the **Custom** drop-down, choose **Select Area to Record**, and then click the border of the application window to specify the portion of the screen that is to be recorded.



**IMPORTANT:** As you move the cursor over the border of the window, the border highlights. Once you select the window, you will see a dashed green line surrounding the application window, and the Dimensions in the Camtasia Studio Recorder panel will indicate that the capture area is exactly 1920x1080. If necessary, you can repeat this step until the proper window has been selected.

- In the **Camtasia Studio recorder** panel, expand the **Custom** drop-down again and make sure **Lock to Application** is selected. This ensures that Camtasia Studio will continue to capture the application window you specified, even if you move the window on your desktop.

**IMPORTANT:** if you change the size of the application window, the size of the area captured by Camtasia Studio will also change, so take care not to resize the application window.



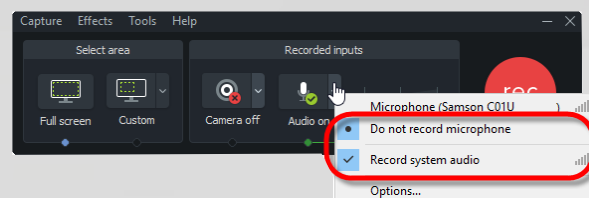
## Recording Your Lesson Video

You will record your lesson video while playing and listening to the previously recorded narration. The resulting .trec file will then contain both the audio and video.

Note: If you will be recording the lesson audio as you step through the lesson while capturing, skip to the next section.

### To record your lesson video in sync with the previously recorded audio:

- In the **Camtasia Studio Editor**, start a **New** project.
- Click **Import Media**, select the audio file that contains the audio narration for the lesson you are about to record, and click **Open**. (You can also drag-and-drop from Windows Explorer to add files to the Camtasia Studio Media Bin.)
- Drag** the audio file from the Media Bin and drop it onto Track 1.
- Make sure that the application you are about to record (such as AutoCAD) is open, has been set to the proper size (1920x1080), and everything is set up in the program for the start of your lesson.
- Open the **Camtasia Studio Recorder**.
- Expand the **Audio** drop-down and make sure that the options **Do not record microphone** and **Record system audio** are both selected (as shown).

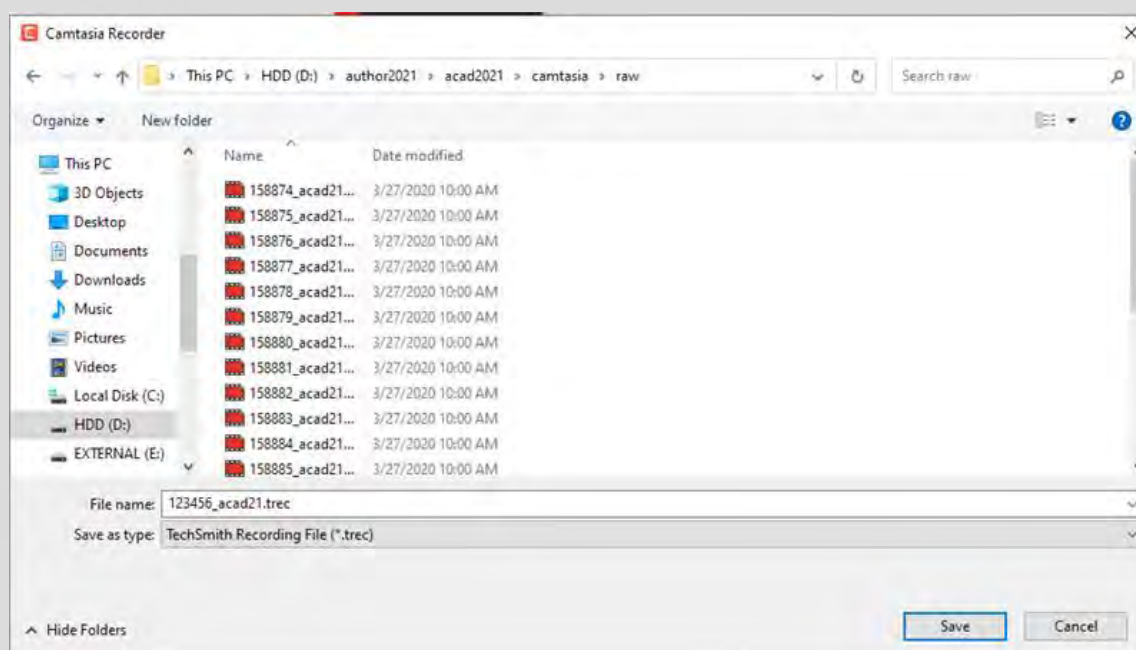




7. Click the **Record** button.
8. After the recorder counts down and starts recording, **switch back to the Camtasia Studio Editor**, click to **Play** the narration audio you previously recorded, and immediately **minimize the Camtasia Studio Editor window**. Switch back to the application you are recording (such as AutoCAD) and start performing your actions in sync with the narration.

**IMPORTANT:** This can take a bit of practice. It also means that you will want to have a long enough duration of silence at the beginning of your narration track to enable you to perform this step.

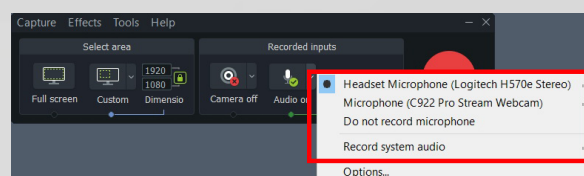
9. When you finish recording your video, click the **Stop** button.
10. You will then be prompted to name and save the recording.



11. Save your .trec file. Be sure to give it a file name that adheres to the required CADLearning file naming convention and matches the name of the audio file (for example, [123456\\_abcd22.trec](#); to match the name of the audio file, which would be [123456\\_abcd22.wav](#)).

### To record your lesson video while recording live audio:

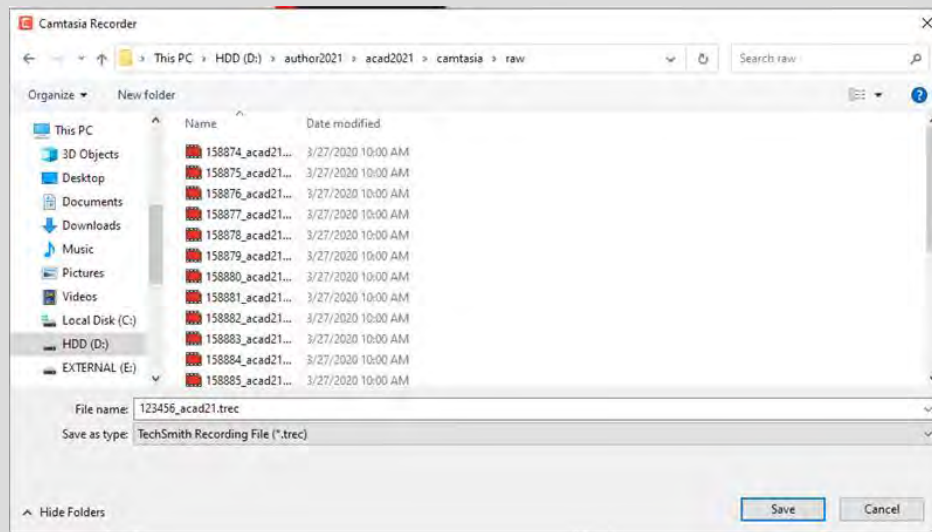
1. In the **Camtasia Studio Editor**, start a **New** project.
2. Make sure that the application you are about to record (such as AutoCAD) is open, has been set to the proper size (1920x1080), and everything is set up in the program for the start of your lesson.
3. Open the **Camtasia Studio Recorder**.
4. Expand the **Audio** drop-down and make sure that the option for your **microphone** is selected, and that **Record system audio** is not selected (as shown).



5. Click the **Record** button.
6. After the recorder counts down and starts recording, switch to the application you are recording (such as AutoCAD) and start performing your actions in sync with your spoken narration.

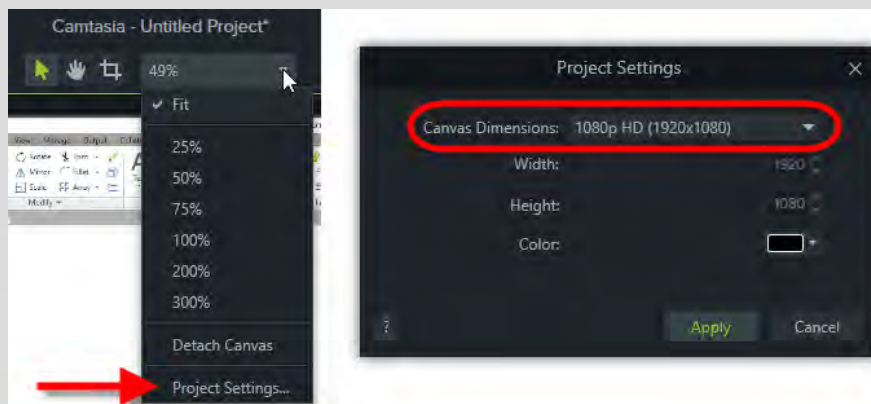
**IMPORTANT:** This can take a bit of practice. It also means that you will want to have a long enough duration of silence at the beginning of your narration track to enable you to perform this step.

7. When you finish recording your video, click the **Stop** button.
8. You will then be prompted to name and save the recording.



9. Save your .trec file. Be sure to give it a file name that adheres to the required CADLearning file naming convention and matches the name of the audio file (if used) (for example, [123456\\_abcd22.trec](#), to match the name of the audio file, which would be [123456\\_abcd22.wav](#)).

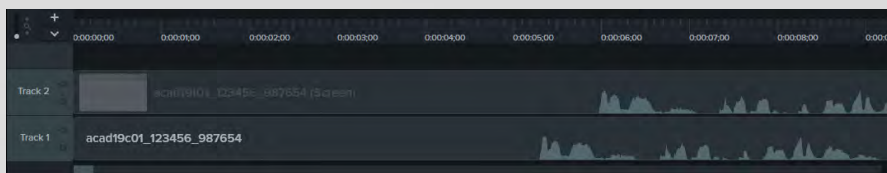
As soon as you save the .trec file, Camtasia Studio will load it into the Media Bin. Verify that the recording dimensions are **1920x1080**. To do this, at the top of the canvas, expand the **Canvas Options** drop-down and choose **Project Settings...** to open the **Project Settings** dialog.



If you do not see this dimension, then you most likely recorded your video at the wrong resolution and will need to record it again (after first adjusting the resolution of the second display and then maximizing the application window so that it fills the second display). **Remember, your video MUST be 1920x1080!**

The .trc file should now appear in the Media Bin.

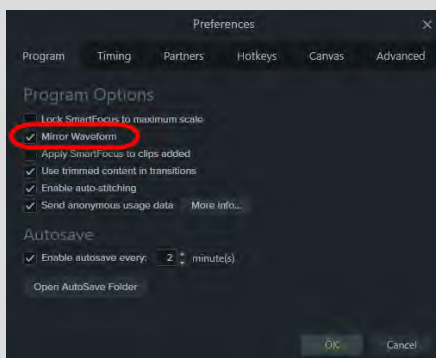
10. Drag the .trc file from the Media Bin and drop it onto Track 2.



Once you complete this step, the Camtasia Studio timeline will contain two tracks:

- **Track 2:** The video you just recorded (labeled “Screen”) which contains both audio and video.
- **Track 1:** The previously recorded audio file (if used).

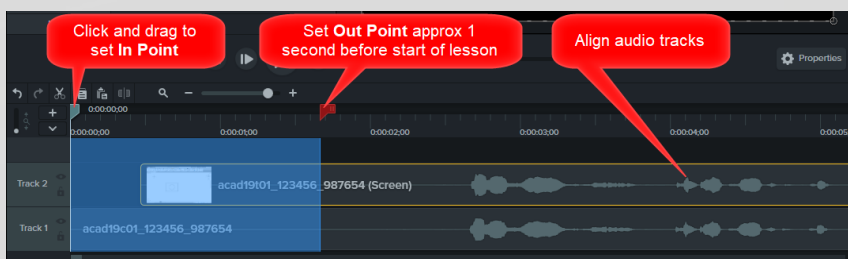
**TIP:** By default, Camtasia Studio only shows the upper half of the Audio sound graph. To see the full sound graph, in the menu, select **Edit > Preferences...** to display the **Preferences** dialog. In the **Preferences** dialog, select **Mirror Waveform**, and then click **OK** to close the dialog.



**NOTE:** This section is **ONLY** if you pre-recorded your lesson audio.

Now comes the tricky part:

11. Use the **Zoom** tools (located directly above the timeline) to zoom in on the beginning of the track.
12. Drag the recorded video on Track 2 until it lines up with the Audio sound graph on Track 1.



**IMPORTANT:** You can click **Play** and listen to the audio to make sure that the two tracks are properly aligned. This does not have to be perfect. If it sounds like an echo chamber, you are close enough.

13. Move the **playhead** to the point at which the audio begins, take note of its position, and then move it approximately 2 seconds to the left. (You will need to make sure that no action occurs in your video prior to this location.)
14. Click and drag the **In Point** (the green control) to the very beginning of the timeline. Then click the **Cut** tool to remove the highlighted portion from both tracks.
15. Select the video track and then in the properties pane, click and drag the audio **Gain** down to **0%**.
16. Use a method similar to step 14 to trim the end of the lesson, making sure that there are approximately 4 seconds of silence and no additional mouse movement at the end of the lesson.
17. Select **File > Save** (or press **CTRL+S**) to save the Camtasia Studio project, being sure that its file name adheres to the required CADLearning file naming convention and matches the name of the audio file and the .trec file. (For example, if the audio file was [123456\\_abcd22.wav](#), then the .trec file would be [123456\\_abcd22.trec](#), and the Camtasia Studio project file would be [123456\\_abcd22.tscproj](#).)

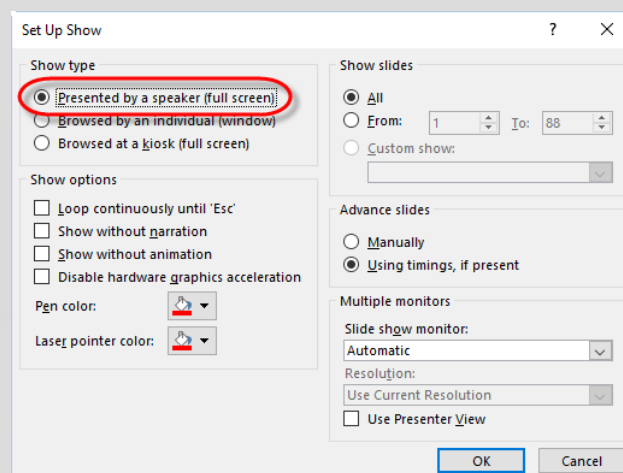
## Using Other Tools While Recording Your Video

Although Camtasia Studio provides tools for adding effects while you are recording your videos (such as circles and arrows), you **MUST NOT** use these tools. **All effects will be added by the producer during post-production.** If you want a specific effect or callout to be added, inform the producers of the name of the effect or the text for the callout, and provide the time stamp of the appropriate point in the video.

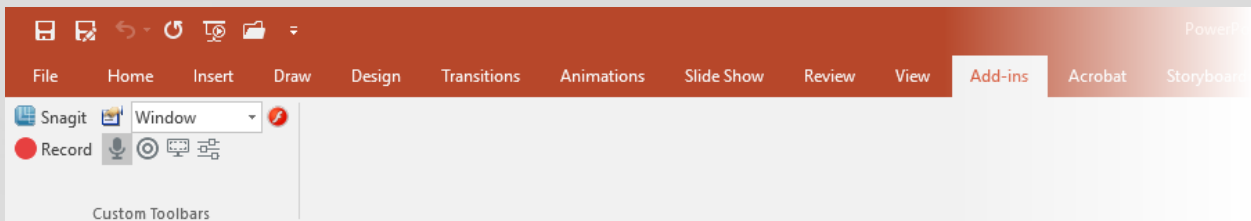
## Recording PowerPoint Presentations

When creating a PowerPoint presentation, you should start with the 4D PowerPoint Presentation Template provided in the 4DStandards/templates folder. You should also use the following steps to configure PowerPoint so that your presentation is displayed and captured on the second display, which has been configured to the proper resolution (1920x1080):

1. In PowerPoint, on the **Slide Show** tab, click **Set Up Slide Show**.
2. In the **Set Up Show** dialog, in the **Show type** group box, select **Presented by a speaker (full screen)** and then click **OK**.



Camtasia Studio provides enhanced capabilities to help you record PowerPoint presentations. The controls for setting up a PowerPoint recording using Camtasia Studio are provided directly within PowerPoint. To access those tools, select the **Add-ins** tab. The Camtasia Studio recording tools are located in the **Custom Toolbars** panel.



You will use the following Camtasia Studio tools to record your PowerPoint presentations:



Record

**Begins recording your PowerPoint presentation**

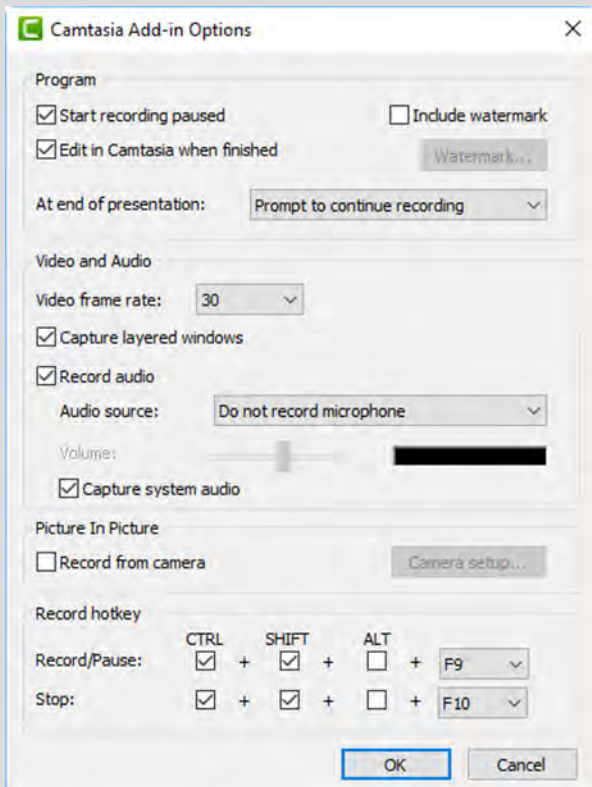


**Records audio for the PowerPoint slides (should be selected)**



**Displays additional options for recording**

Since you have already recorded your audio, when you record a PowerPoint presentation, you will use steps similar to those used when recording the video within the application you are teaching. Click the **Options** button and check the recording options before proceeding to make sure that they match those shown below.

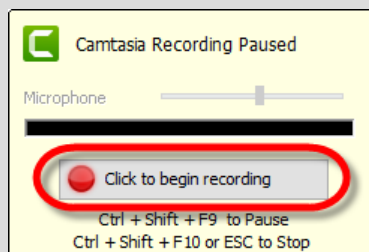


Verify the following options:

- **Start recording paused** is selected (so that recording does not start as soon as you close this dialog)
- **Include watermark** is NOT selected
- **Record audio** is selected
- **Audio source** is set to your **microphone**
- **Capture system audio** is selected (so that Camtasia Studio captures your pre-recorded audio as it plays, while you record your PowerPoint presentation)

**To record your PowerPoint presentation in sync with the previously recorded audio:**

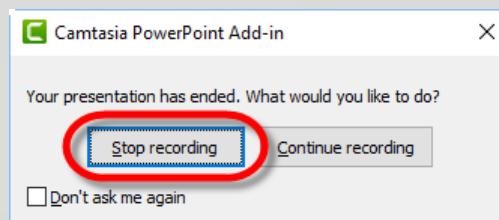
1. With **Camtasia Studio** open on the first display, start a new project.
2. Import the audio file (the .wav file) containing the audio narration for the PowerPoint lessons you are about to record.
3. Drag the audio file from the **Media Bin** and place it into **Track 1**.
4. Switch to **PowerPoint** and load the PowerPoint presentation you are about to record.
5. In PowerPoint, on the **Add-ins** ribbon, in the **Custom Toolbars** panel, click **Record**.
6. The PowerPoint presentation opens in presentation mode on the second display and a Camtasia Studio dialog opens in the lower-right corner of the screen. To begin recording your presentation, click the **Click to begin recording** button.



7. Switch back to the **Camtasia Studio Editor**, click **Play** to start playing the narration audio.
8. Switch back to **PowerPoint** and immediately move your cursor out of the way so that it is not captured in the video.
9. Control your PowerPoint presentation as you normally would during recording.

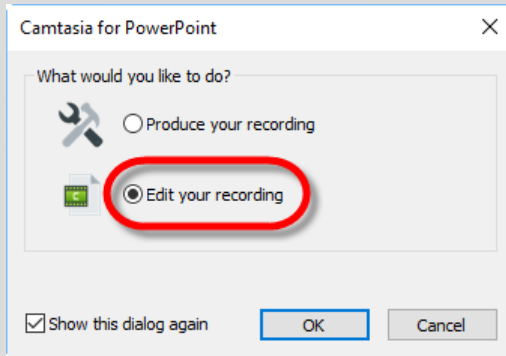
**TIP:** While recording your PowerPoint presentation, you can press **Page Down** to advance through the presentation.

10. Press **ESC** to stop recording.
11. You will see the **Camtasia Studio PowerPoint Add-in** dialog, asking what you would like to do. Click **Stop recording**.





12. The **Save TechSmith Recording As** dialog will display, so that you can save your recording as a .trec file. Navigate to the proper folder and be sure to give the file a name that adheres to the required CADLearning file naming convention and matches the name of the audio file, and then click **Save**. (For example, if the audio file was `123456_abcd22.wav`, then the .trec file would be `123456_abcd22.trec`.)
13. The **Camtasia Studio for PowerPoint** dialog opens, asking what you would like to do. Choose the option, **Edit your recording**, and then click **OK**.



At this point, your computer will switch back to the **Camtasia Studio Editor** and the PowerPoint presentation will appear in the **Media Bin** (as a .trec file). Verify that the recording dimensions are **1920x1080**. To do this, at the top of the canvas, expand the **Canvas Options** drop-down and choose **Project Settings...** to open the **Project Settings** dialog.

If you do not see this dimension, then you most likely recorded your video at the wrong resolution and will need to record it again (after first adjusting the resolution of the second display). **Remember, your video MUST be 1920x1080!**

14. Drag the .trec file from the **Media Bin** and drop it onto Track 2, making sure that it is at the left end of the track.

Once you complete this step, the Camtasia Studio timeline will contain two tracks:

- **Track 2:** The video captured from the PowerPoint presentation (labeled “Screen”), which contains both audio and video.

Now you can follow steps identical to those previously described for the application lesson videos.

At this point, since you do not add any other effects to videos of PowerPoint presentations, you are done. The .trec, .camproj, and .wav files should all be in your `/camtasia/raw` folder. You will share these files on the 4D Technologies OneDrive so that the producer can produce the final lesson.

## PROCEDURE: Producing Your Lessons

Once you have finished editing your lesson or PowerPoint video and saved the Camtasia Studio project file a final time, it is ready to be produced. Other than uploading the necessary files to the server (as described in the *Welcome to CADLearning Guide* and *System Setup Guide*), your work on the lesson is complete.

**IMPORTANT:** Before uploading the lesson files, you must ensure that all files referenced by the Camtasia Studio project (the .trec, .tscproj, audio files, and any images or other files that appear in the Camtasia Studio Media Bin) are located in the **\camtasia\raw** folder.

EXAMPLE: **\abcd22\camtasia\raw**

The files you will upload are:

- the edited audio file (the .wav file)
- the video recorded using Camtasia Studio (the .trec file)
- the Camtasia Studio project file (the .tscproj file)
- any other files you may have included as part of the lesson

With the exception of the actual Camtasia Studio project file (the .tscproj file), the other files should all appear in the Media Bin in Camtasia Studio.

## PROCEDURE: Recording Mobile Videos

When using a mobile device to record video content, please adhere to the following:

- Resolution: 1080p, 30 frames per second
- Format: mp4 at the highest quality possible for the device

If you're capturing video directly from a tablet or phone, the video should be a landscape orientation only (horizontal picture).

If you're capturing the screen of an application, maintain the screen format and CADLearning will utilize that format for post-production. If possible, capture it in a landscape orientation.

## PROCEDURE: Uploading Your Files

CADLearning uses Microsoft SharePoint to manage all lesson assets used when working with Camtasia Studio (the .tscproj and .trec files, as well as the .wav audio file for the lesson narration and any other files that appear in the Camtasia Studio Media Bin).

As soon as you have finished your lesson, you must share all of these files to the appropriate folder on SharePoint (as described in the *Welcome to CADLearning Guide* and *System Setup Guide*).

Be sure to track which assets you have uploaded in the planning sheet you were provided.



## CHECKLIST

Please refer to this Recording Guide Checklist to ensure that you meet all of the requirements for creating questions. (You may wish to print this page and keep it handy as a reference.)

- Set up a generic email to avoid displaying sensitive personal or corporate information.
- Set up a generic folder structure as described in the *Welcome to CADLearning Guide*.
- *Configure your system as described in the System Setup Guide so that you record with a screen resolution of 1920x1080.*
- *Create exercise files as necessary, ensuring that there will be no display of sensitive personal, corporate, or client information in the video.*
- Use Camtasia to capture your video while you demonstrate each step of a lesson.
- Use PowerPoint presentations to introduce and explain concepts.
- Use pre-recorded lesson audio to guide you as you perform and record the lesson steps.
- Edit your recordings as instructed in this guide.
- Save the files and upload them as instructed in this guide into the appropriate SharePoint folders for the Production Team.

Questions? Contact [support@cadlearning.com](mailto:support@cadlearning.com).