

Converting Procedures to Tutorial Movies

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What We Will Cover

- The theory and practice of converting procedures to movies – Why do it?
- What are the differences in media?
 - Documentation
 - Training
 - Online learning
 - Tutorial
- How to plan and execute a video tutorial for software
- Demonstration – Camtasia Studio™ from TechSmith®
 - Produce an example of a video tutorial based on written procedures.
- Tools discussion: Camtasia, ViewletBuilder™, Macromedia® Captivate™

Why Create a Tutorial?

- We are discussing software tutorials only
- Training – Inform how to use an application. Examples:
 - Logging onto the application
 - Showing feature changes from one release to the next
 - Showing tricky procedures – compensating for an ill-designed user interface
 - Describing how to fill out forms, with examples of data entered
 - Showing how to search for information
- Sales and Marketing – Show how easy an application is to use
 - Demonstrating the application at Tradeshows
 - Demonstrating a "canned" Sales script to prospects on a laptop computer

Why Create a Tutorial?

- Pictures are worth thousands of words
 - Transfer information more efficiently than reams of paper or hours of instructions
- Reduce cost
 - When the trainees cannot come to you, send the training to them
- Reduce support calls
 - Rather than walk callers through a procedure, show them where to log on to view the tutorial
- Increase customer satisfaction
 - The ‘Gee, whiz’ factor alone is worth the effort – tells customers you care about giving them information while respecting their time

Technical Knowledge Transfer Media

- What are the differences in media?
- Documentation – Online and Paper
 - Appropriate for reference information and detailed procedures
 - Takes time to find information, read it, learn it, and apply it
 - More difficult to get people to use paper documents
- Training – Live instructor-led training
 - Good for complex and extensive training
 - Allows time for practice – “Hands-on” experience
 - Provides a metric on student success when completed
 - Students must dedicate time to attending
 - Good retention of information without having to rely on the book

Technical Knowledge Transfer Media

- Online learning
 - Good for training that does not need to be “hands-on”
 - Can be effective when accompanied by a textbook and homework assignments – e.g., online degree programs
 - Allows a live instructor to apply a metric to student success when completed
 - Students must dedicate time to attending, but scheduling is more flexible than live training
- Tutorial
 - Good for software or other highly visual subjects (plumbing, carpentry, interior design)
 - Good for providing an overview of how an application works
 - Does not allow details or a multitude of options to be shown

Planning a Video Tutorial

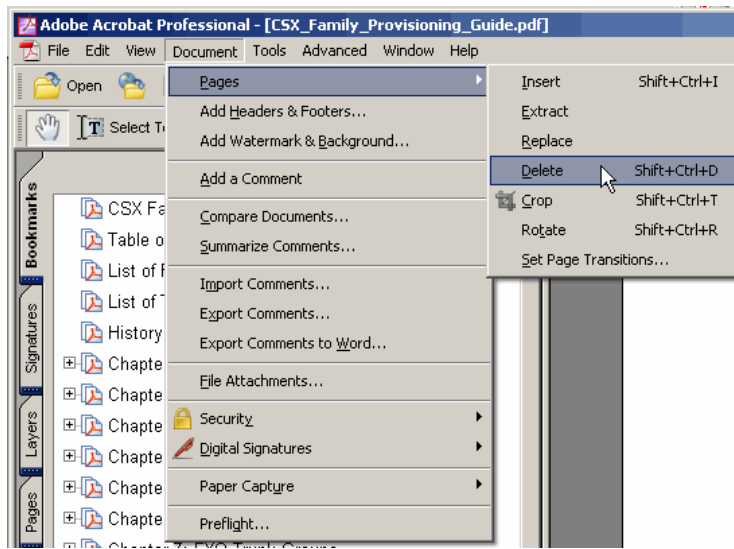
- A written plan is best, or at least partially written
- Is the medium appropriate?
- Determine your audience
- What do I want to accomplish? Write your goals
- When the goals are defined, determine how best to accomplish them
 - What to show
 - What sequence of events (high level)
 - Where to start and where to end
 - Ask again, will this accomplish the written goals?
- Review existing written procedures if they exist

Walk Through

- After the plan is written, walk through the sequence to determine scope
- Use the existing written procedures or write new ones
 - Establish user actions and system responses – write them down
- While using the software, determine the most likely path
 - What options do I want to show at each step?
 - You cannot show scenarios that show all possible actions and responses – that is the job of the User's Guide and Reference Manuals
- Determine how much time the tutorial will take
 - Try to limit tutorial “chunks” to five minutes or less
 - If more than five minutes, you need more than one tutorial

Prepare a Storyboard (Optional)

- If you prefer a visual storyboard, prepare one
- Use a screen capture tool that can grab cascading menus
 - Also good if the capture tool can “Include Cursor”
- If it is helpful, merge the storyboard with the script, like this:



1. In Acrobat Professional, select the **Document** menu, then **Pages >**.
2. From the flyout menu, select **Delete**.

Write a Script

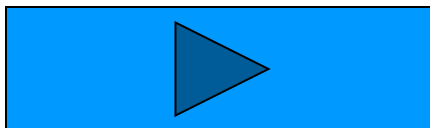
- Start with written procedures if they exist (see example)
- Write a script based on the results of the walk through
- Go back to the software to get the sequence right
- The script is to be spoken aloud during the tutorial
 - Use large printed text to act as cue cards for the voice-over
 - Write for spoken delivery – this will require editing the existing procedures
 - Generally, the spoken procedures are warmer, less precise, more “folksy”
- Leave room to annotate or highlight

Record the Video

- Make yourself comfortable in a quiet environment
- Clean the mouse and pad so the cursor doesn't jerk
- Set up screen resolution for best results
- Set up the application and any data you might need to enter or choose during the tutorial
- You do not need to record audio while recording the video
- Concentrate on timing – leave time for the voice over commentary
- Move slowly and deliberately, pausing before each action
- Use the script as a roadmap only
- Or, follow the storyboard if you have made one

Record the Video


- Use Studio to record all screen movements:
 - Text entry, such as logins and passwords
 - Menu selections
 - Dialog displays
 - Field entries or selections
 - Any mouse activity you need to show (such as drag-and-drop or enlarge a dialog)
- Plan for editing – do not worry if you make minor errors
- Avoid using keyboard shortcuts, but mention them later in callouts and audio if important
- Do not worry about audio for now – you can add it later



Search Procedures

Using the Acrobat 6 or later Full-Text Search [\[Click Here to Start\]](#)

If you are unsure which CopperCom document contains the information you are searching, use this feature to search them all.

1. From any document in the collection, select the [binoculars search button](#)  Search
The **Search PDF** panel opens.
2. In the **What word or phrase would you like to search for?** box, enter the term or text you need to find. For example, to find everything about system alarms, enter the term “Alarm” in the box.
3. In the **Where would you like to search?** box, select either **In the current PDF document** (the default) or **All PDF documents in**.
4. From the drop-down list, either select a location (for example, the drive where the CD-ROM is inserted) or choose **Browse for Location...** If you browse, the **Browse for Folder** dialog displays to select the exact location of the directory where the documents are located.
5. If required, select one or more of the listed search conditions: **Whole words only**, **Case-Sensitive**, **Search in Bookmarks**, and **Search in Comments**.
6. Click **Search**.

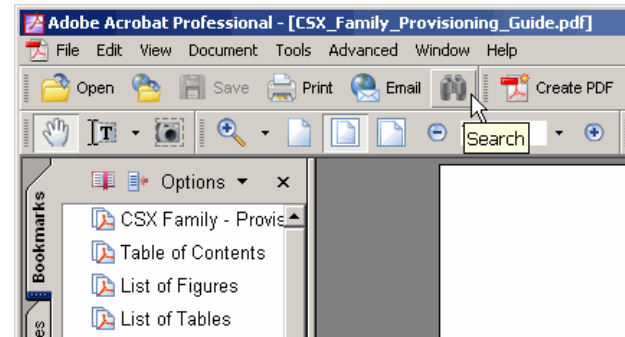
NOTE: For more information, from the Acrobat toolbar select **Help > Adobe Reader Help**. From Help, select the topic “Searching Acrobat PDF Documents.”

Script

[START RECORDING]

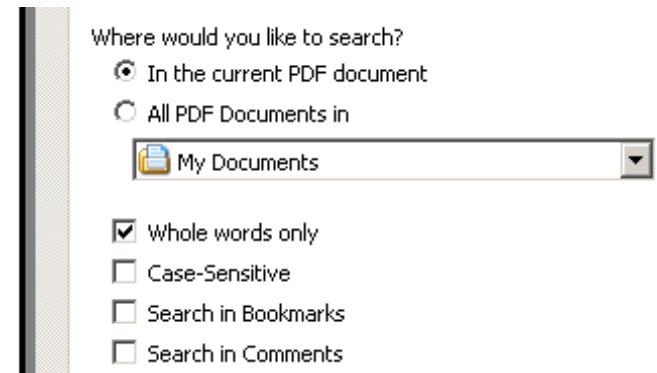
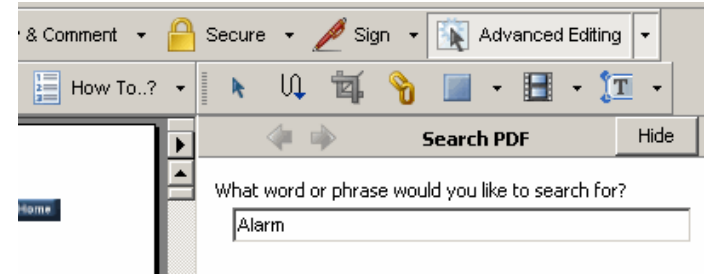
Welcome to “Searching Adobe PDF.” This tutorial will show you how to find terms in Acrobat documents similar to searching on the Internet.

1. First, click the binoculars button from the Acrobat toolbar.



Script

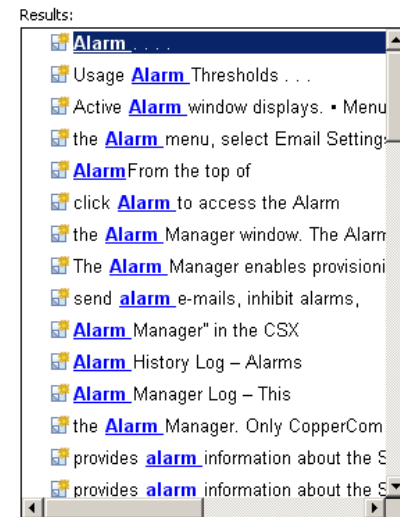
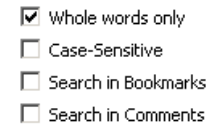
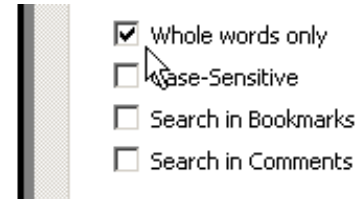
2. In the What word or phrase would you like to search for? box, enter the term “Alarm.”
3. Leave the “Where would you like to search box?” at the default selection, “In the current PDF document.”



Script

4. Select “Whole words only” to limit the search to exact matches of the term.
5. Click the Search button.
6. After the program is done searching, review the results.

[STOP RECORDING]



After Recording

- The recorded video file is loaded in the clip bin for editing
- Refer to the demonstration for an example session of editing video and adding the audio.

Available Tools

- Camtasia Studio™ <http://www.techsmith.com>
 - About \$300 with a free 30 day trial
 - Captures AVI
 - Uses common video and streaming codecs
- ViewletBuilder™ <http://www.qarbon.com>
 - About \$300 with a free 30 day trial
 - Captures frames and movements in Java Applets for much smaller download size
 - Requires Java Runtime installed on each viewer's PC
- Macromedia® Captivate™ (formerly RoboDemo) <http://www.macromedia.com>
 - About \$500 with a free unspecified trial period
 - Creates a Flash file for easy streaming and small download size

Questions?

- Discussion and Questions
- Thank you!

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