Storyline Simulated Lab Recording Guide

Getting Started:

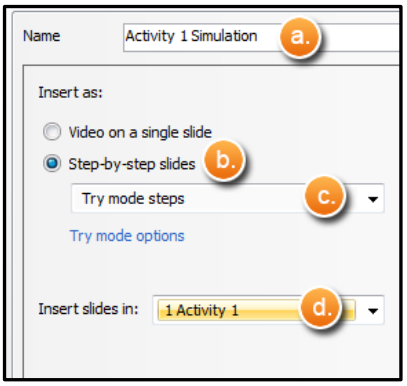
1. Ensure you are using the latest **HDS_Storyline_Recording_Template_v#.#.story** file. Once the file is open, save it under a new name (use the naming format ***CourseCode_Lab_X.story*** (where ***X*** is the lab #).
2. Change your PC's Windows theme to HDS.
3. Change your screen resolution (or that of the virtual server if applicable) to as low a resolution as possible without distorting screen images and text.

   For virtual servers:
   a) Launch the **Remote Desktop Connection**.
   b) Click **Show Options**.
   c) Click the **Display** tab.
   d) Change the screen resolution.

Recording the screen:

You insert a lab activity into its corresponding scene, i.e. the first activity will go into the Activity 1 scene, the second activity will go into the Activity 2 scene, etc. We'll start with the first lab activity.

1. Click the **Record Screen** button.
2. See ***Best Practices: Staging Requirement – Prior to Recording*** section later in this document for specifics on screen size recommendations and adjustments.
3. Click the **Record** button to start/pause/resume recording.
   - You can pause mid-recording to move the screen area or windows within the recording area if need be).
4. Click **Done** or press **Esc** to finish recording.
5. Name your recording and insert it into your scene:
   a. Name your recording something meaningful. You *cannot* change the name later.
   b. Choose **Step-by-step slides**.
   c. Choose **Try mode steps** in the drop-down.
   d. From **Insert slides in**, select your scene (in this case *Activity 1*).
   e. Click **Insert**.
   f. Save the file (it's advisable to save the file every few minutes).
   g. Preview the scene to ensure correct display/functionality.



Steps 1-5 would be repeated for each lab activity being recorded. If you need additional scenes for more lab activities:

1. From the **Story View** (tab), click on the last activity scene (by default, this will be Activity 4).
2. Copy the scene (*CTRL+C* or *right-click,* **Copy**).
3. Paste the scene (*CTRL+V* or *right-click*, **Paste**).
4. Rename the new scene to Activity 5 (or whichever number is next in sequence).

This should add the new scene immediately after the preceding one.

Editing and Formatting Slides:

1. Select all slides in a scene and apply the **Instruction Bar** layout.
2. Edit instruction text on each slide:
   a. Add **Instruction Bar** text. Describe to the learner *what to do*, not *how to do it*. Use full sentences and add a period at the end.

   b. For on-screen labels, highlight the label in bold text. For keystroke/mouse clicks, place the text command within <> and use italicized text.
   c. Move/resize the **Instruction Bar** as needed (if covering something important on screen).
3. If you want to add ***informational text*** (optional pop-up text for a specific region of the screen), copy the Additional Info marker (orange 'i' circle icon) from the *Simulation_Scene* and paste it on the slide (place it on the relevant area of the screen). Edit the title of the box and associated text for the marker.
   a. If this marker is added, you will need to edit the triggers for any hotspots on the screen to include any markers to not trigger the Hint Caption layer.
4. If you want to add ***important information*** (the learner sees it when the slide appears), copy the **Important Info** text box (yellow caption with red '!' icon) from the *Simulation_Scene* and paste it on the slide. Place the box in the relevant area of the screen and edit text as needed.
5. Utilize the **Hint Caption** layer instead of **Try Again** layer.
   a. On the main trigger indicating the **Try Again** layer (if the hotspot is clicked outside of), click **Try Again** and change it to **Hint Caption**.
   b. Delete the trigger indicating to show the **Hint Caption** layer when Hotspot 1 is hovered on.
   c. Edit **Hint Caption** layer text if necessary (ensure the caption box color is HDS theme dark blue).
   d. On the Hint **Caption** layer's options (gear icon), check the box that says "Hide slide layer when timeline finishes" to allow the caption to reappear again for the user if the wrong area of the screen is repeatedly selected.
   e. Note: be default, the **Hint Caption text box** will fade out in 3 seconds. If you want this to behave different, remove the animation or extend its duration on the timeline).
6. If a slide calls for an action besides keystrokes or a simple mouse click, you may need a new hotspot to trigger the **Hint Caption** layer. If so, add a new hotspot that covers the entire screen area, place the layer below (to the back of) the main hotspot, and create a trigger that shows the **Hint Caption** layer if clicked.

***NOTE**: Text on slides should not include information covered during the v/ILT e.g. product details and descriptions. It should also not include references to documentation or other course (there is a References section in the WBT Template for references for each lab).*

Review Processes:

1. Upon completion of the lab, publish the WBT and upload for review on the YSC server.
2. Revise lab simulation based on feedback.
3. Create a **Translation** document and submit for technical editing: **Articulate icon** on top-left > **Translation** > **Export** > name the document > **Save.** *DO NOT MAKE ANY CHANGES TO YOUR STORYLINE FILE AT THIS POINT.*
4. Upon receipt of edited **Translation** document, review and approve the changes.
5. Import the final **Translation document**: **Articulate icon** on top-left > **Translation** > **Import** > select final document**.**
6. Verify all changes are implemented and correct.
7. Send final **.story** file to WBT developer.

Storyline Simulated Lab Recording Best Practices

For questions about general Storyline functions, visit theLoop here: http://loop.hds.com/thread/7460.
For questions regarding simulated lab procedures, visit theLoop here: http://loop.hds.com/thread/17806.
For the latest Articulate templates and change logs, visit theLoop here: http://loop.hds.com/thread/10374.

Simulation Development Process and Roles:

Task	Role
Create blueprint (*each lab simulation should include): 1. Lab 2. Objectives 3. Activities	SME
Sign off on blueprint	Approvers
Create individual lab simulations	SME
Peer review (as needed / *SME to confirm with PM)	1. Reviewer – content 2. Reviewer – usability/functionality
Revise lab simulation based on feedback	SME
Export translation word file and publishes simulation lab alpha	SME
Edit Word file (*using *Track Changes*)	TW
Review track changes and approves	SME
Import translation word file to WBT with track changes accepted	SME
Review overall simulation	SME
Forward simulation file to WBT Developer	SME
Create alpha WBT	WBT Developer

Recording Best Practices:

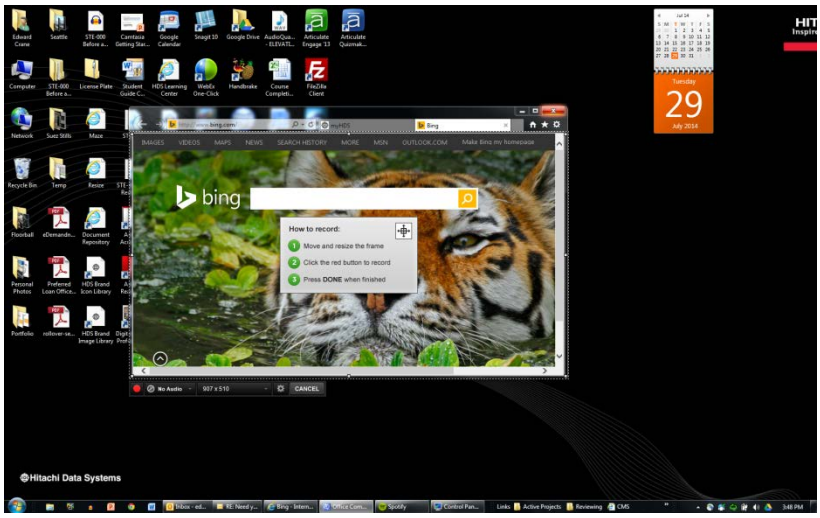
- Record in small chunks. Each recording should be a series of steps to complete a specific task. This will create smaller recordings that are easier to deal with and organize.
- Demonstrate the quickest approach. There may be multiple ways to demonstrate a task. Always show the quickest and shortest way to achieve the task.
- Don't "overdemonstrate" the familiar. If you are demonstrating something that most (if not all) users probably know how to do, e.g. an installation wizard, you can spend less time on it. Show the first screen, then show the last screen and indicate "we've completed the installation wizard steps." As another example, if a user name and password need to be entered, you could say "Here, enter your user name and password" and then have the user name and password appear.
- Don't demonstrate all features. Remember the purpose of simulated labs is to allow the learner to perform a specific task, not to point out various features of the software.
- Mouseovers/hovers of on-screen items will not be captured during recordings—only mouse clicks and keystrokes.
    - If you need to capture hover menus, you may need to use a screen capture program and insert new slides within the finished recording and manually adjust triggers for those hovers/menus to appear within your simulation.
- If you scroll up and down a screen with your mouse (as opposed to clicking PgDn key or clicking the screen's scrollbar) during a recording, the scrolling action will be inserted into the recording as a non-editable video. If you intend to require the user to perform the scrolling action, do not scroll with your mouse, but instead click the screen's scrollbar and/or require the PgDn keystroke.

Staging Requirement – Prior to Recording:

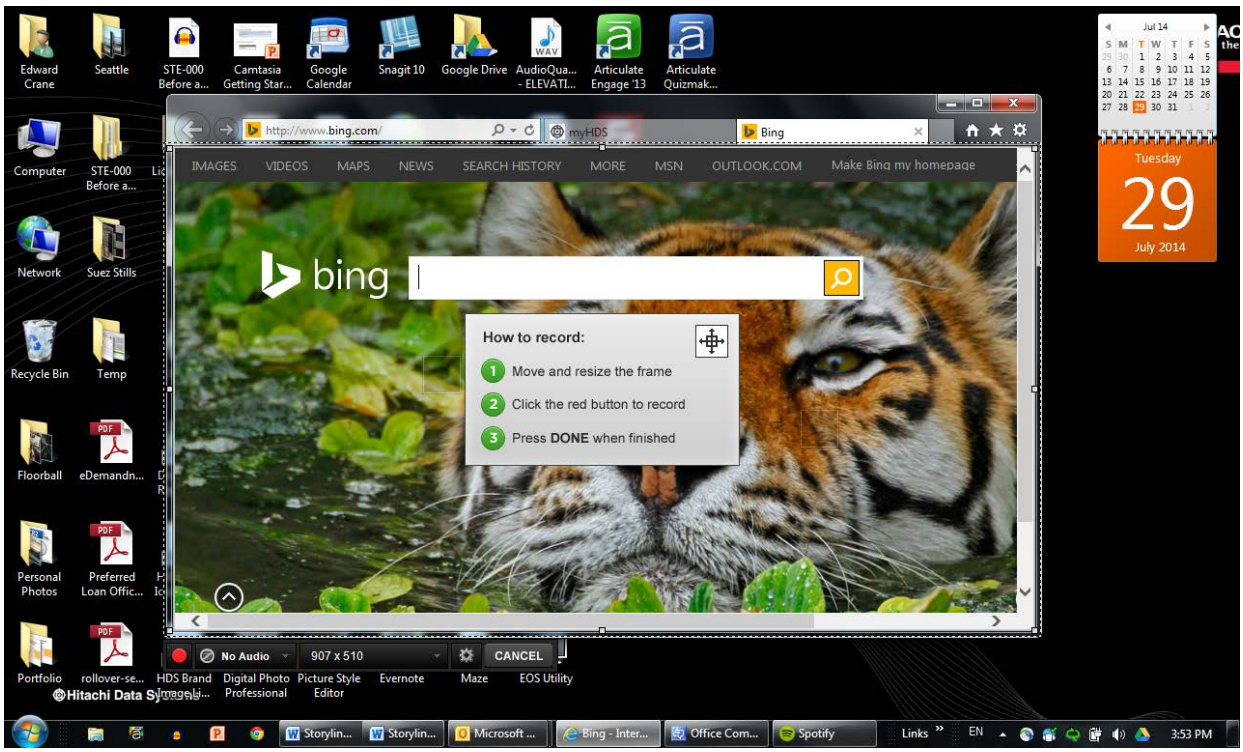
Prior to recording, you need to do some "staging" in order to create a user interface environment that will reduce distractions, maximize screen space, and generally look as "standard" as possible.

1. **Lower Your Screen Resolution**

   The higher your screen resolution, the smaller the recording area will appear and the smaller the interface will appear to the learner. For example, a recording area of 907 X 510 pixels looks like this on a monitor with a recommended screen resolution of 1680 X 1050. Notice the size of the icons and text on the desktop and in the browser window.



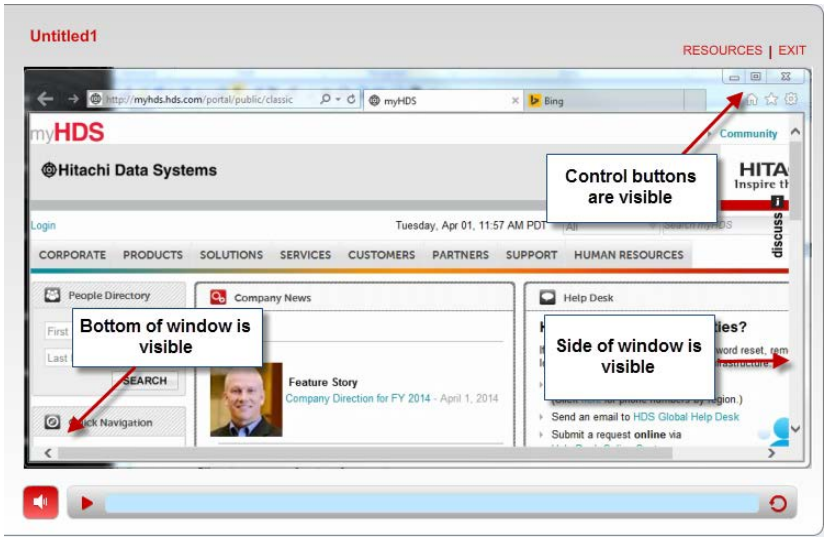
   The same recording area of 970 X 485 looks like this on a monitor with resolution of 1280 X 768. The text of the IE menu bar is larger.



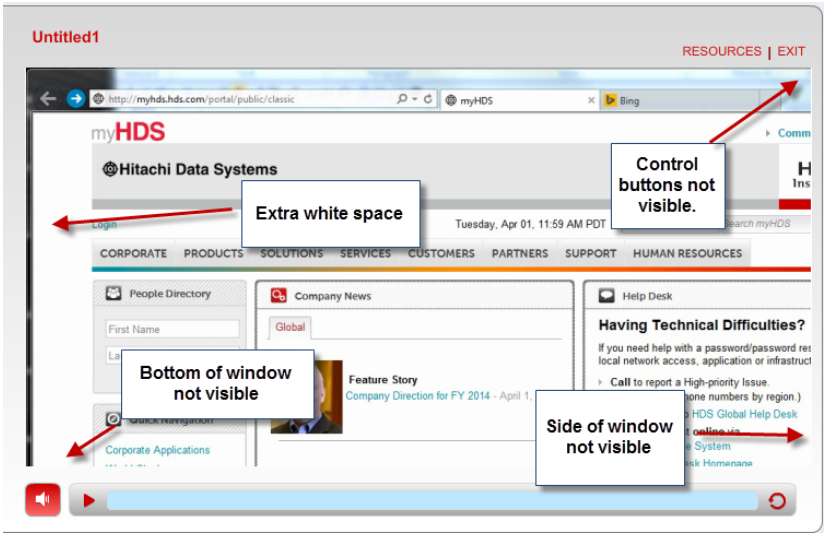
- Change your screen resolution (or that of the virtual server if applicable) to as **low a resolution as possible without distorting screen images and text**. You'll more easily be able to work with the recording area and **the images and text that the learner sees will be larger and more legible**.
- **Use the HDS Windows theme**. Personalized themes may make fonts difficult to read, etc.

- With few exceptions, **the recording area should be the same screen ratio as the Storyline story size (16:9)**. You can accomplish this by resizing the recording area using one of the corner resizing handles of the recording frame outline.
- **Make a note of resolution of the recording area you're using** so that if you have to go back and rerecord you will have consistency.
- **Only record the part of the window/app that is essential for the user to see in order to complete the task**. For example
  - If you're recording a web browser window and the address bar is the same throughout the activities, leave it out of the recording area.
  - If you're recording an application and the left navigation menu is not part of the task, don't include it in the recording

2. **Use Internet Explorer or Firefox** to record web pages or web-based applications. Google Chrome reports very little information, so details will be missing from your captions and some steps could be omitted.
   - **Hide or turn off as many menu bars, toolbars, and status bars etc. as possible** to enhance the browser content area.
   - **Resize the browser window and/or recording area as needed**. For example, the benefit of having at least part of the window or app inside the recording area is mainly for clarity and aesthetics.



Below is the same window that was not resized to fit inside the recording area:



- **Working with multiple browser windows**:
  Some applications launch windows that cannot be resized to fit within the capture area (e.g. Virtual Servers). If this occurs:
  1. Record as usual.
  2. If a window opens that is larger than the capture area, pause Storyline, resize the window so that it fits within the capture area, then resume recording.

  If the session is static, cannot be adequately resized, OR if resizing it will cut or cover too much information:
  1. Move as much of the session as possible into the capture area.
  2. Begin Recording.
  3. Without pausing the capture, move the remainder of the session into the capture area. Upon releasing the mouse, the rest of the session will be captured.

While Recording

- Be careful of the appearance of "**Tool Tip**" Text. If text pops up appears when you hover your mouse over an object (a.k.a. Tool Tip text), you may want to try to capture the screen without the text, especially if it's covering a relevant part of the screen. Options include:
  - Wait for the Tool Tip to "time-out" and disappear before you click on the screen.
  - Move the pointer to an area where the tool tip will not be triggered.
  - Capture, then later edit or ask the developer to edit in post-production.
- **Zoom:** if your screen recording capture doesn't get as close as you'd like to show something, you can use the Storyline **Zoom Region** feature to allow a designated area to be zoomed in for a set period of time. Be careful to not zoom away from your screen instruction text or a clickable area of the screen, or the user won't know how to proceed.
- Use the **PrtScrn** key during screen recording to capture a "snapshot" of the recording area. You will hear a camera shutter click when used, and you can retrieve the image for insertion after recording to place on a slide.

Publishing Labs for Review

1. Click the **Publish** button on the toolbar.
2. Click **Web**.
3. Change the *Project Title* to something understandable to you and the developer.
4. Ensure that the *target folder* is set to the correct folder on your hard disk.
5. Ensure that the player is **HDS Simulation Dark v1-1**.
6. Click **Customization** at the bottom and ensure that video and audio quality are set to the highest quality.
7. Click **Publish**.
8. Make the published files available to be reviewed using your designated folder on the YSC internal server (contact someone familiar with the process, if needed).