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The eLearning Guild's
LEARNING SOLUTIONSSM

Practical Applications of Technology for Learning e-Magazine

THIS WEEK: Development Techniques

Making a Demonstration Video for E-Learning Use

By Steve Haskin and Tim Martin

Just before our December holiday break, a FedEx pack landed on my desk here at The eLearning Guild. The return address identified it as coming from a particularly smart and creative e-Learning technology provider. I eagerly sliced open the bag, and a couple of shiny new BlackBerry® mobile devices tumbled out. The sleek, stylish devices landed face-up on my faux wood grain desk, surrounded by coffee stains and crumpled Post-it notes, and looking a bit out of place.

Our friend had sent these devices loaded with new e-Learning technology and content for us to investigate. Imagine! Here were two BlackBerrys, fully loaded with state-of-the-art, smart-phone enabled, Learning 2.0 e-Learning applications. I could hardly contain myself. After all, BlackBerry is the object that even the National Security Agency (NSA) could not pry out of President Obama's hands. It must be good.

My colleague, Brent Schlenker, and I were eager to play and learn (this is one of the great pleasures of working at The eLearning Guild). I grabbed one and tossed the other to Brent, who was grinning as he caught it with one hand. We quickly shuffled into a budget meeting. The BlackBerry just felt right as it slipped into the palm of my hand. It had already become an extension of my body. A BlackBerry is just a little thing, but it is fully connected to the world and contains more computing power than the mainframe my father used.

I carefully inspected the device, played with the buttons and ran my fingertip

Video can be an excellent medium for truly rapid development of e-Learning content. However, not many e-Learning developers have much skill or experience with video. This week's article, by two outstanding videographers, will give you everything you need to get started!

A publication of



along the curvature of its edge. I poked and pushed the various thingies on the BlackBerry. Nothing happened. Finally, with a twinge of defeat, I glanced up at Brent. He was doing his best to look attentive as he waited for the meeting, but under the table he was also trying to get his BlackBerry to start. It wasn't working for him either.

We looked at each other and then whipped out our iPhones, and raced to the World Wide Web. Googling "BlackBerry" just as the meeting was starting we quickly found tutorials on "Powering-up a BlackBerry."

Of course, with the aid of a practical and useful e-Learning demonstration, I eventually mastered the skills needed in order to use the BlackBerry and the applications that our friend had included. Had I previously known about the Research In Motion version of usability logic, switching on a BlackBerry would be intuitive. However, I am not currently a BlackBerry user. If you had to design instruction that would get new BlackBerry users "up to speed," how would you do it?

How-to instruction

The smarter devices become, the more the design of their functionality will attempt to "brand" customers to a particular manufacturer. It seems that "usability" is less about usability, and more about the creation of a

reliable revenue stream from a channel or from well-trained consumers.

We live with an ever-increasing multiplicity of technology devices that are miraculous, addicting, and imprisoning all at the same time. In the pleasant days of yesteryear, we only needed to worry about hooking up home theater systems and Apple 2e personal computers. Now a Denial of Service attack on our Web, the inability to pick up e-mail, or the simple-yet-impenetrable functionality of any "smart device" can bring the world to its knees.

"How-to" instruction is an important training modality; in fact, "learning how to do things" is the cornerstone of being human. Our lives are spent learning how to do things, and this doesn't stop simply because we "learn" in the workplace or even when we slip the "e-" in front of learning.

Most often, we learn how to do something when someone with personal knowledge and expertise in the task teaches or mentors us. However, mentoring requires the easy and timely access to a knowledgeable person. The ever-popular ugly stepchild of mentoring is on-the-job training (OJT) from the employee in the next cube. This person is expedient, but may or may not actually know how to properly execute the task. This convenient cube citizen often does not pro-

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vide the desired results, since merely being convenient will not replace the need for correct knowledge. It's a little like being lost in a strange city, and asking directions from another tourist. You're better off just looking at a map. This is why a Post-it (the ubiquitous "sticky note") listing a string of keyboard short cuts taped to a monitor can be more effective than a convenient cube citizen at helping you navigate a software task.

When sticky notes just aren't enough, there's e-Learning! If the goal is to answer every question that may ever come up in your business in a just-in-time fashion, and if you have a pesky bottomless pit of money in need of emptying, the preferred method of e-Learning is Electronic Performance Support Systems (EPSS). However, EPSS is not ideal for those of us living in the real world. Out here, we require simple how-to demonstration learning nuggets, efficiently designed for commonly needed instructions.

Keep it simple!

Create as little e-Learning as possible to convey the necessary information and skill. Consider your investment of time, resources, and money that could be used on other projects, as well as the cost of lost opportunity. Also, consider the learners' investment of time and interest. The how-to explanation should be short and efficient while respecting the content. How do you do this?

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By definition, how-to instruction is task training. The first step in designing such instruction is to develop a simple task list for the activity. For example, an iPhone user may have difficulty switching on a BlackBerry. The task list may be as follows: 1) Orient the Learners' point-of-view (POV) to the view of the front panel, 2) Direct POV to the top edge of the device, 3) Identify power button, 4) Press power button.

There are three mediums for producing a little how-to nugget; these are still images, video, and animation. Each is progressively more difficult technically, and more complex to produce, but each meets a specific set of requirements. More complex learning requirements demand more complex production modalities.

Sequenced still images

A series of still images that clearly illustrate the task can be very effective. Manufacturers often ship consumer electronic equipment with instructions that are sequenced graphic images describing the set-up and operation of the device. These can be photos or drawings, most often the latter. Such illustrations are high

contrast and bold colors, with important details exaggerated with highlights or outlines. To eliminate the possibility of confusion, the illustrations leave out irrelevant details such as textures, vents, and logos. The panels appear in task order, with numbers that indicate the sequence, and call-outs that provide important information and labeling.

Video

Video is particularly useful when:

- The task is complex, requiring many steps,
- The subject device has many cable connections, switches, and control panels, or
- The device is oddly shaped, in a way that is difficult to explain in a still image.

The goal of a video is similar to that of the sequenced images. The how-to video must be clear, easily understandable, and it must provide explicit instructions.

3-D animation

If the task requires explanation of internal or moving parts, an animated effect is the preferred solution. There are some technical terms that describe various kinds of animated illustration. A *Cut-Away* reveals the interior of the device to review an important element. A *Fading Cut-Away* is an animated transition, useful in demonstrating a sequence of tasks. For example, the device operator pushes a button, the outer shell of the device fades away to reveal a part or the entire interior, a part moves, or electricity moves through a circuit board. An *Exploded* image is one which shows all of the parts of the device "exploded" out from the core: screws, fasteners, cover panels, circuit boards, and other parts all appear in the illustration as if they were out of and apart from the object.

Animation is useful when there is motion, or when a still image doesn't explain an action adequately. Video may not suffice if the task includes manipulation by hand, and the operator's hand would be in the way, obscuring the action or preventing it from showing clearly in the video. Animation can replicate the task without the use of a hand.

Some examples

Returning to the BlackBerry, here are three progressively more complex how-to examples. A simple sequence of clear images that illustrate each step in the task is enough to show a new customer how to quickly turn on the device. A short video could demonstrate the physical motion needed to activate applications, and to operate buttons on the screen of a BlackBerry Storm.

An animation may be the best method to show a technician how to open the shell of the device and

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replace a part. In an animation, the screws can “explode out” in the proper order and the shell can open. The learner can clearly see the motion in the animation.

Video is a reasonable way to create how-to e-Learning nuggets for complex tasks. In the last half of this article, we offer you five sets of tips for producing a how-to video: lighting, motion, support, camera, and formats. Keep in mind that whenever possible it always best to keep it simple.

Lighting for video

“Lights ... Camera ... Action!” Any video starts with this. And there’s a reason that lights come first. Without light, there is no image. No matter how much you spend on a camera, tripod, or other equipment, if there are no lights, there is no image and hence no video. So what about lights? What kind do you need?

If your video is only going to be shot outside on a sunny day, then you don’t need any other lighting, except for maybe a reflector. In this case, a piece of white cardboard or Fome-Cor® makes a fine reflector. If, like the rest of us, you shoot indoors or on cloudy days, you need some lights.

This is what you need for a basic kit. You can buy a kit, or you can put one together.

Three-point lighting

Good kits are designed to support *Three-Point Lighting* so they have at least three lights: one Key light, one Fill light, and one Back light. Three-point lighting is a method of lighting an object or person that emphasizes the three-dimensional qualities of the subject as it moves through time on a two-dimensional field.

1. Key light

The Key light is the primary source of illumination on the subject. In a “studio” shot, the Key light will be near the camera, 10 to 30 degrees off center from the camera. This light is just enough off the camera’s “line of sight” to support the illusion of depth of field. The Key light should shine down on the subject at a 45 to 65 degree angle. If the shot replicates a natural light like a window or the sun, the Key light goes in the logical position that supports the illusion of natural lighting.

2. Fill light

The purpose of the Fill light is to soften the edges of the shadows created by the Key light. Place the Fill light in an opposing symmetrical position to the Key light. If the Key light is 30 degrees to the left of the camera, the Fill light should be about 10 degrees to the right.

The Fill light is typically not as bright as the Key light. The Key-to-Fill ratio is usually 8:1 which means that the Fill light is 12.5% as bright as the Key light.

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Three-point light kits come with lights of the proper brightness to produce this ratio. You will not have to worry about light levels as long as the lights are set in a normal three-point light configuration.

3. Back light

The Back light is the light that projects an edge of light around the contours of the subject. This light does not illuminate the background. It lights the back of the subject or object. Place the Back light 180 degrees from the Key light. The Back light assists the viewer in understanding the exact edge of the subject. Without the Back light, the subject would fade into the background, making it difficult for a viewer to understand the shape of the object.

It's a very good idea to purchase a Three Point Light Kit as it makes it easy to effectively light a video production. There are several options for the light sources themselves.

Incandescent lights (Tungsten)

These look like regular old light bulbs, but they are a little bit bigger, and they provide a more balanced light than a regular light bulb. You can get a kit with the three lights you'll need, along with stands to hold the lights and maybe a reflector, for about \$100 to \$125. You can also spend \$400 for essentially the same thing, so shop around for the best price. The main problem with incandescent (Tungsten) lights is that they tend to burn more orange as they age. But they are inexpensive, so you can keep the bulbs fresh without much expense.

Halogen

These lights are more expensive than the incandescent, but they have several advantages, and one or two disadvantages. The first advantage is they are brighter. And bright means you can see more and control more. They also don't yellow as they age. They are much hotter though, and every once in a while they burn out with a bang. However, most of these lights come with a screen that goes over them, so there's no worry of injury. A good kit, by Lowel, will include two Fill lights (one for Back light and one for Fill) and a Key light, stands, and a reflector or two. It will cost from \$650 up to whatever you can afford.

These are the two main kinds of lights that you can purchase. I use both in different circumstances. In a small office, I'll use Tungsten because they aren't as hot. After an hour in a small room with halogen lights, you could be getting a little (more than a little) sweaty and tired.

New lighting technologies

There are some new lighting technologies in the marketplace, including Fluorescent and LED. Both of these have the advantage of operating very cool.

Fluorescent lights that are used for studio lighting have good color balance, so you don't get the green cast that most fluorescent lights give. LED lights have very good color and can be made into whatever color you want. Both of these light types are very expensive. LED spot lights start at around \$1000, and that's for one light.

Whatever kind of light you get, you'll be right. Painting with light is quite a wonderful thing to do, and can take your video production to a higher level.

Camera support (tripod)

You're shooting a video and need to keep the camera still. What do you get? A tripod, that's what. There are all kinds of camera supports ... monopods (one leg), tripods (what this is about), and various devices to help steady a camera when hand held.

This section is only about tripods, though. But it's really about the part of a tripod that holds onto the camera; the head. The name "tripod" refers to the three legs, which provide a stable way to securely hold a camera off the ground. But you also need a head for your tripod. This connects the camera and the tripod. The tripod attaches to the bottom of the head, and the camera attaches to the top of the head. There are two kinds of heads: friction and fluid. Which is best for you and your use?

Friction head

A friction head has several advantages. The biggest advantage is cost. They can be very inexpensive, as low as \$30 dollars, for a decent one. I don't recommend friction heads, however, unless you're not going to move the camera at all during a shot (and moving the camera includes zooming). These are friction heads that work simply by having two (usually metal) plates that squeeze together and a screw to make them looser to enable a repositioning of your camera.

Fluid head

A fluid head costs more, but has several advantages. A good fluid head can be had for about \$150 and up. They work very differently than a friction head and make panning (moving the camera left to right) and tilting (moving the camera up and down) a smooth process, which is what you'd probably like for video. A fluid head has two chambers that are filled with a viscous liquid, with a plate in between the chambers. There is a tiny orifice in the plate that creates resistance between the two chambers. In a good fluid head, you can make the orifice larger or smaller to decrease or increase resistance.

A simple sequence of clear images that illustrate each step in the task is enough to show a new customer how to quickly turn on the [BlackBerry Storm]. A short video could demonstrate the physical motion needed to activate applications, and to operate buttons on the screen ...

Choosing the right head for video

Friction heads are usually best for still photography, not video. In still photography, it doesn't matter if there is a little herky-jerky motion when you're moving the camera. Camera movement with fluid heads is smooth because it's easier to create smooth motion with resistance and fluid than it is with friction.

There is one other consideration: how heavy is your camera? If your camera is small, you'll want a smaller and lighter head. Most tripod heads have a rating that indicates how much weight they can support. If your camera weighs two pounds, then a tripod head with a rating to support 25 pounds is obvious overkill.

Cameras

Once you decide to make a video, you will require a video camera. If you don't own or have access to a camera you will need a budget to buy equipment (we hope it's not too low). If you're like most of us, you want to look at a camera first. So what does your camera need to have in order to make it right for your production?

My only "requirement" for a low-priced camera is that it must have an input (jack or socket) for an external microphone. You'll want to be able to use an external microphone. Trying to use the built-in microphone on any camcorder (and this includes the high-priced ones) is courting disaster in your sound. Bad sound can make good video bad.

I have two more requirements. First, most cameras in the small, inexpensive realm now support HD (High Definition). While this is in and of itself a good thing, if you're planning to show your video online as part of a training module, you DO NOT NEED HD. It's total and complete overkill. The good news about this is that the chips in cameras that work with HD also work quite nicely with regular old standard definition (SD). In fact, their SD resolution is better than cameras of old.

The second item is media. For use in e-Learning production, I would suggest staying away from (at least at this writing in early 2009) anything except MiniDV tape cameras. Yes, there are all kinds of DVD cameras and hard drive cameras in the marketplace these days. But DVD and hard drive cameras compress video beyond what is good to edit.

There is a reason to my madness. Using compressed video involves uncompressing the video, and then recompressing the video after it is edited. Every compression cycle somewhat lowers the quality of the video. Almost all compression produces some sort of "artifacting." This means you'll see some blockiness when you pan, or the video sometimes looks as though it's briefly breaking up.

A camera with a built in hard drive would be great, but if you're out shooting all day, that drive can fill up.

After shooting, you must move the video to the hard drive attached to the editing computer. Ultimately, using tape as the medium, and then capturing the video onto a hard drive, degrades the video images less than multiple digital transfers do.

Tape has another advantage. When you shoot in standard definition, you can capture files that are uncompressed (called ".avi" files). These .avi files can actually have better quality than High Definition files. Shooting in High Definition also has one other disadvantage (besides looking no better in an online experience). That disadvantage is that HD video is more difficult to edit and takes up lots more processing time and power. This is true even for highly compressed HD video.

Here are the specifications to look at when you're shopping for a camera:

1. How good is the lens, and what is its zoom power (3X? 10X?)? This will be on the camera. You don't want to use digital zoom, but optical zoom.
2. How many pixels does the chip have? An HD chip will have at least 1.1 megapixels, which is clearly too many for standard definition video, but it will help the overall resolution.
3. How big is the chip and how many are there? High-end cameras, those with a price starting over \$2000, usually have three chips. That is one chip for each red, blue, and green channel. Your camera will only have one chip.

Formats or Codecs

Codecs ... can't live with them ... can't live without them. What are they and how do they work with an e-Learning video project? Simply put, a codec is a **C**oder-**DEC**oder. It's a way computers save space with video files, which, uncompressed, are ENORMOUS.

There are codecs for showing video and codecs for editing video. You need codecs to show your video, whether on a DVD ... that's one codec ... or online ... another codec ... or for editing ... yet another codec. You have probably already heard of two of these codecs, Quicktime and Flash video.

Quicktime (.mov files) is a codec that holds other codecs (as are a few others) so that you can still use it for editing (with one codec inside), then render it to another codec for purposes of placing on a DVD, and yet another codec for showing it online using Flash Video.

Flash video (.flv) is only good (and it's very good) for placing in a Flash file (.fla) that will be turned into a .swf file that can actually be shown on the Web.

If you think the whole thing is confusing, you're right! It is very confusing if you haven't worked with it before. And even if you have, it's still confusing some-

Codecs are marvelously portable and changeable. They're what make YouTube possible, and make your online e-Learning possible as well. Codecs can take a very large video file that can't be downloaded and make it into a file that can be "streamed" online.


times. There's more to codecs than Quicktime and Flash video, though.

Codecs are marvelously portable and changeable. They're what make YouTube possible, and make your online e-Learning possible as well. Codecs can take a very large video file that can't be downloaded and make it into a file that can be "streamed" online. We've mentioned two common codecs above, but here's a very short list of the most important ones for e-Learning:

- .flv – This is Flash video. You can't just put video coded as .flv in a Web page. It must be incorporated into a Flash file that is then made into a .swf file that you can place in your e-Learning project.
- .mov – This is a Quicktime file that's actually a container for other codecs such as the ones that follow in this list.
- h.264 – This is a highly compressed (read small file size) format that's especially good for HD video as it keeps the file size manageable. Remember, though, that it's hard to see a difference online between SD and HD.
- .avi – In a way, this is the granddaddy of all video codecs. The name is an abbreviation for "audio/video interleaved." It was invented as a way to keep lips from saying the same thing as the audio. It can be inside almost any codec and can be turned into almost any codec.

If this is all really confusing to you, don't worry. If you use the defaults set up in your software, you'll probably get along just fine. It might not look like Hollywood, but then your camera probably didn't cost over \$125,000 either!

Conclusion

We hope this article has given you some useful information about the technology and equipment needed to make an instructional how-to video. Anyone could be forgiven for being a tad confused or even intimidated. This would only be natural, but don't give up! Gather whatever equipment you can get your hands on and make a video. Use what you have, and embrace guerilla filmmaking for e-Learning production. 

Author Contact



Tim Martin is an ethnographic filmmaker who formerly produced instructional videos for continuing legal education and judicial training. Currently he is the Director of Business Development for The eLearning Guild.



Stephen Haskin started in video production and computing in the 1970's. He has worked with digital video and e-Learning since the late 1980's and he has been at the forefront of streaming media. Previously, Steve was a

producer and director of film and video, and won many awards for his work. Steve worked for the University of Michigan for several years, but has now returned to the private sector, where he currently directs and consults for distance learning projects and video. He frequently speaks at conferences and seminars and is the author of several books.

Discuss these articles in the "Talk Back to the Authors" Forum of Community Connections (http://www.elearningguild.com/community_connections/forum/categories.cfm?catid=17&entercat=y). You can address your comments to the author(s) of each week's article, or you can make a general comment to other readers.

Additional information on the topics covered in these articles is also listed in the Guild Resource Directory.

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In the Archives

This is the second article by Tim Martin, and the fourth by Steve Haskin, for The eLearning Guild. The eLearning Guild has previously published articles whose topics relate to this week's. These are available to Guild members in the Learning Solutions Archive online. Members must log in to download them. Here are the authors, the article topics, and the publication dates. (Not a Guild Member? Join today for immediate access to all 289 articles!)

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- "Visual Design for e-Learning Video Production: An Introduction" (May 12, 2008) (Tim Martin)
- "Extra Insights Column: Making a Cut in Video" (July 19, 2004) (Steve Haskin)
- "Repurposing Taped Video for e-Learning Part I: From Tape to Hard Drive" (March 3, 2003) (Steve Haskin)
- "Repurposing Taped Video for e-Learning Part II: From Hard Drive to Optimized Video File" (March 10, 2003) (Steve Haskin)

Articles on related topics

- "Video, Pinnacle, and Articulate Team Up for Dealership Training" by Marisa Dodson (June 16, 2008)
- "Teacher Presence: Using Introductory Videos in Online and Hybrid Courses" by Paula Jones, Kim Naugle, and MaryAnn Kolloff (March 31, 2008)
- "Make Sure Your Media Makes Sense and Cents" by Patti Shank (February 11, 2008)
- "Nine Trends That Will Shape e-Learning in 2008" by Bill Brandon (January 28, 2008)
- "A Guide to Captioning Windows Media and QuickTime Using Subtitle Workshop" by Ellen Meiselman (April 18, 2005)
- "Fast-track Your e-Learning Video Development: Targeting Production Needs Analysis" by Laura Levy (January 31, 2005)

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- "Elearning Blueprint": <http://clive-shepherd.blogspot.com/2009/03/elearning-blueprint.html> (March 25, 2009)
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