

Developing and Delivering Digital Guide

Last Updated: August 21, 2020

Author: Ben Walters

Contents

Overview	3
Equipment Considerations	3
Hardware setup	3
Machine Setup	4
Windows setup Steps	5
Clean up desktop	5
Remove Date and Time from System tray	5
Set resolution & zoom level	7
Install new Microsoft Edge Browser	10
Close Teams	10
Close Outlook	10
Set home tabs for Microsoft Edge	10
Clear your browser history	12
Set VSCode to Light mode	14
Pause Windows Updates	15
Mac setup steps	17
Clean up desktop	17
Remove Date and Time from System tray	17
Set display scaling	19
Install new Microsoft Edge Brower	21
Set home tabs for Microsoft Edge	21
Clear your browser history	22
Close Teams	24
Close Outlook	24
Set VSCode to Light mode	24
Presentation Best Practices	27
Background Setting	27
Personal Appearance	27

Camera Framing.....	27
Delivering a great demo	27
Set your Zoom level	28
Turn on Zoom option in Mac	28
Plan on how to talk to your demo	29
Don't direct with your mouse	30
Appendix & Resources	31
Resources.....	31

Overview

As we make the shift from in person to digital delivery, there is a need to address how presenters can be enabled for success in the digital delivery of their content. There are several things to consider not only when presenting your session but also when building the content that can help to ensure the best delivery and engagement from attendees.

This document details recommendations from physical equipment to software, through to best practices for machine setup, presentation skills, as well as session design tips.

Equipment Considerations

When it comes to presenting your session either via recording or in a live digital delivery, you should take a moment to consider some of the equipment you will use to ensure that you are setup for success. While it would be nice to have studios to deliver/record your session you will probably find that the equipment you have on hand can be used for delivering a decent quality session either live or in a pre-recorded delivery.

Hardware setup

As the adage goes “The best camera is the one you have with you” and you will find the same applies to the hardware you are using for your live delivery/recording.

At minimum you should aim to have the following devices ready for your session

- Web Cam
 - A web camera that delivers a minimum 720p (ideally 1080p) resolution, will allow you to best produce a high-quality presentation for streaming.
- External Microphone

You should plan to have a microphone that is external to your computer, internal microphones tend to pick up a lot of the inner workings of the machine (Fan noises etc....)

- **Headset microphones** provide a very easy solution when presenting however it is a good idea to take a moment to make sure you have the microphone positioned correctly to ensure that your voice is heard but breathing is not. Ideally your headset microphone should be positioned just below your bottom lip, with a distance of 2-3 cm from your face.



- **External dedicated microphone** if you have a dedicated external microphone like a Blue Yeti or podcast microphone then take some time to review the documentation that came with your microphone, this will detail the best approach and placement for your microphone to ensure the best quality audio.

Machine Setup

One of the first steps in preparing for your session is to make sure your machine is in a clean state and will not result in any unplanned moments during your presentation. There are also several steps you can take to ensure your machine setup is as free from distractions as possible.

Before you review your machine setup make sure you're physically setup correctly for best performance and to ensure you don't have any networking issues hardwire your machine do you router this will give you the best connection to the internet for streaming.

Also makes sure your machine is plugged into power, not only with this keep your machine from turning off during your presentation but most laptops will run at a higher performance when plugged directly into power.

Windows Cheat Sheet Links

	Item
	Cleanup Desktop
	Remove Date and Time from System Tray
	Set resolution and zoom level
	Install Microsoft Edge
	Set Home Tabs in Edge
	Clear Browser History
	Close Teams
	Close Outlook
	Set VSCode to Light Mode
	Disable Windows Updates

Mac Cheat Sheet Links

	Item
	Cleanup Desktop
	Remove Date and Time from System Tray
	Set display scaling
	Install Microsoft Edge
	Set Home Tabs in Edge
	Clear Browser History
	Close Teams
	Close Outlook
	Set VSCode to Light Mode

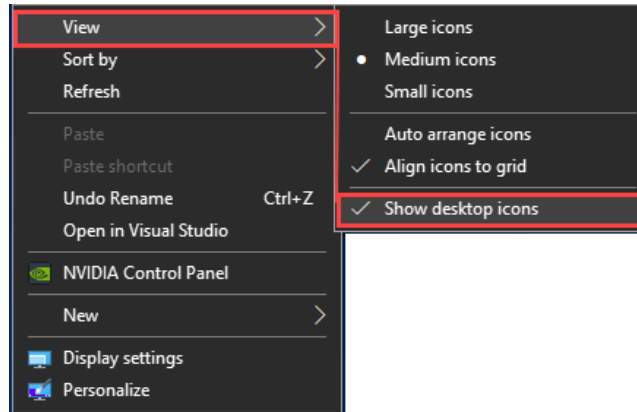
Windows setup Steps

Clean up desktop

A messy desktop can be very distracting to an attendee especially if you are switching between presentation and demo frequently, in addition this some file names, could release sensitive information about Microsoft. There are two approaches you can take to tidy up your desktop and make sure it is free from clutter.

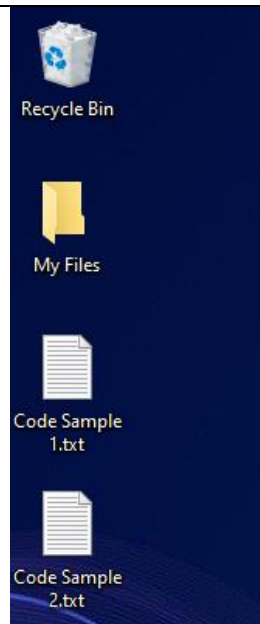
Hide Desktop Icons:

The quickest and probably easiest way to tidy the desktop is to simply hide everything. To do this, simply right click on your desktop and select **View>Show Desktop Icons**. This will hide everything (including the recycle bin) from view. Remember however if you will need to navigate to the desktop folder using windows explorer all your files will still be there so this should only be used if you know there is no need to navigate via window explorer.



Sweep it under the rug:

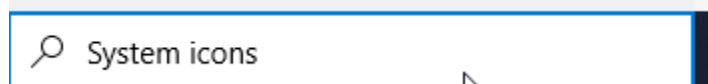
The second option is great if you need to have sample files in an easy to access location during your demo. For this simply create a new folder on your desktop called something innocuous "My Files" and drag everything that's on your desktop into this directory then place any specific items you need outside this.

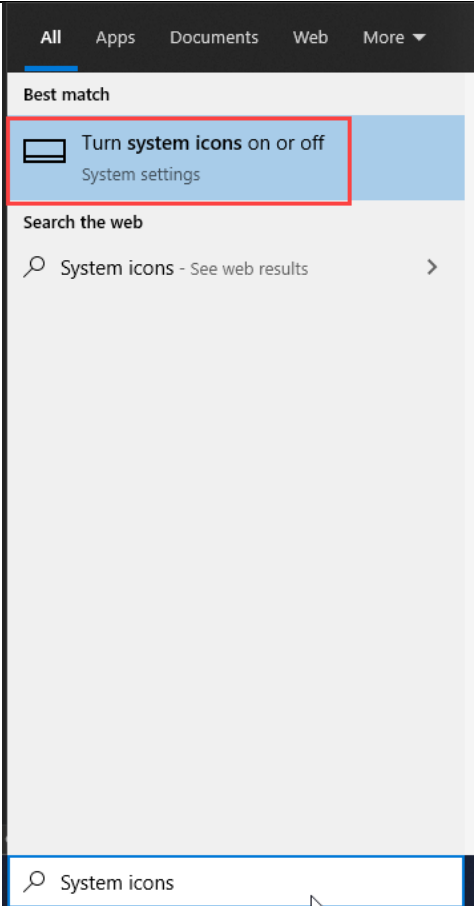


Remove Date and Time from System tray

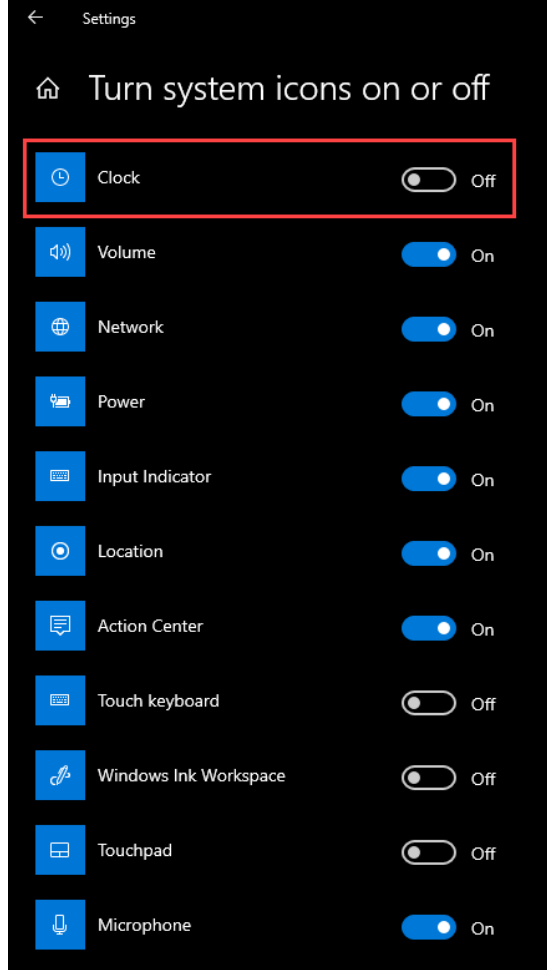
The date and time in the system tray are a clear give away of when a video was recorded. However, it's very easy to remove this information from the System tray.

- Click on the search box on the start menu
- Enter "System icons" into the search box



<ul style="list-style-type: none">○ click on “Turn system icons on or off” in the returned results	 <p>The screenshot shows the Windows search interface. At the top, there is a navigation bar with tabs: 'All' (selected), 'Apps', 'Documents', 'Web', and 'More'. Below this, the search results are displayed. The first section is 'Best match', which contains a single result: 'Turn system icons on or off' from 'System settings'. This result is highlighted with a blue background and a red rectangular border. Below the 'Best match' section is the 'Search the web' section, which shows a search bar with the text 'System icons - See web results' and a magnifying glass icon. At the bottom of the search interface, there is a search bar with the text 'System icons' and a magnifying glass icon.</p>

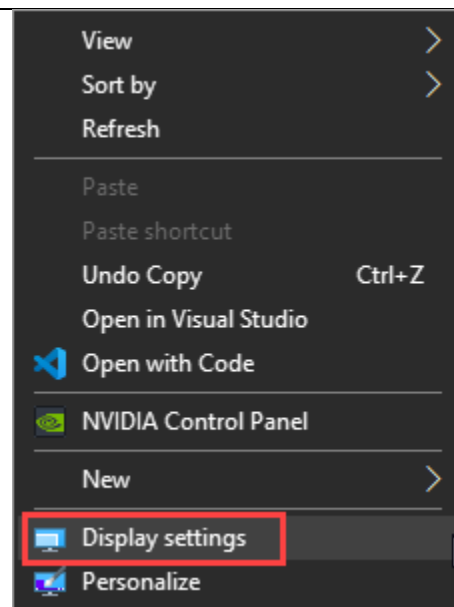
o Click to Turn off the Clock



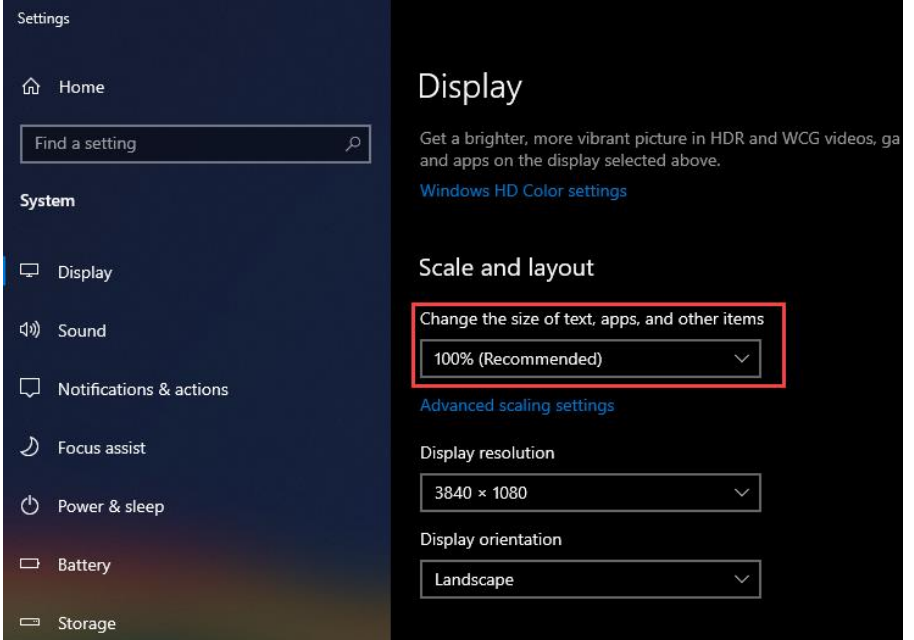
Set resolution & zoom level

All recordings will be captured in 1920x1080 so before you start make sure you have your resolution set correctly.

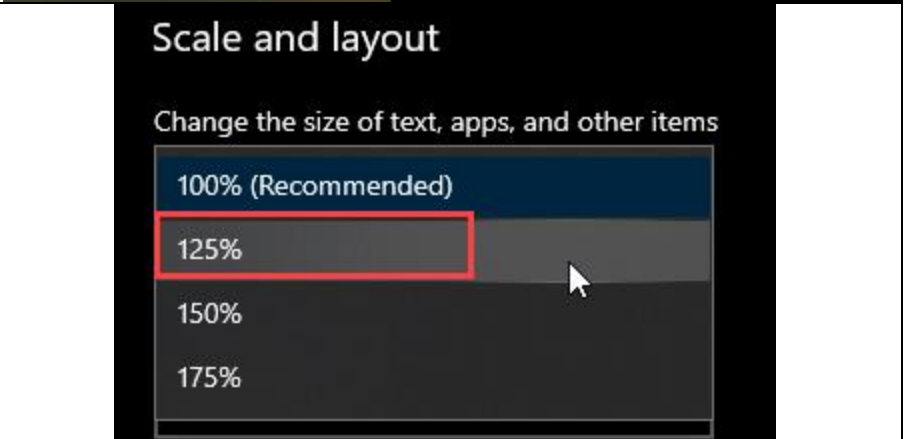
o Right click your desktop and select "Display Settings"



- Scroll down until you get to the display section



- Under 'Scale and layout' select 125%
NOTE: Normally this would be higher for a live presentation but since this is a recording 125% will be perfect



- Under “Display resolution” select “1920x1080”

Display resolution

3840 × 1080

1920 × 1080 (Recommended)

1680 × 1050

1600 × 1024

1600 × 900

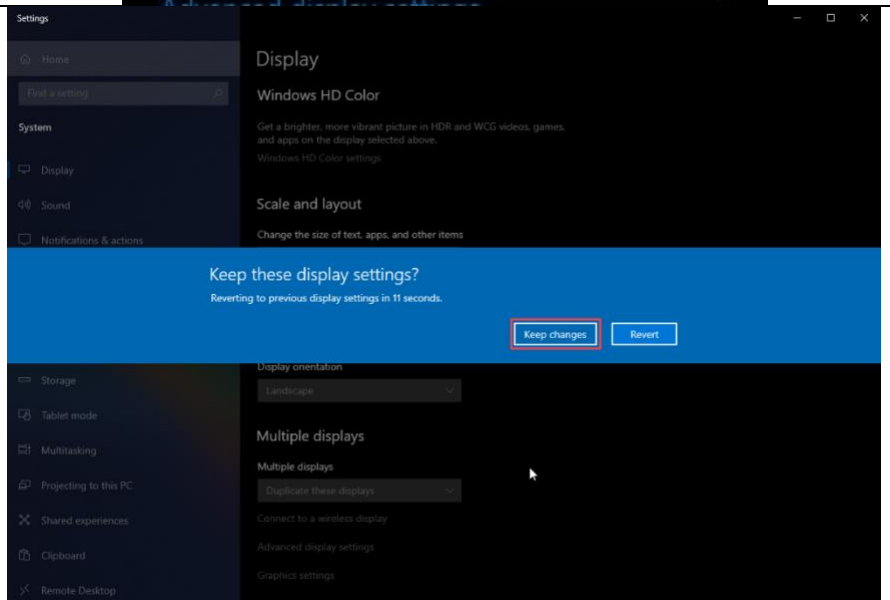
1440 × 900

1400 × 1050

1366 × 768

1360 × 768

- Click “Keep changes” to save and update



Install new Microsoft Edge Browser

It is company policy that any presentation or demo that requires a browser be done with our new Microsoft Edge browser. To install this got to www.microsoft.com/edge

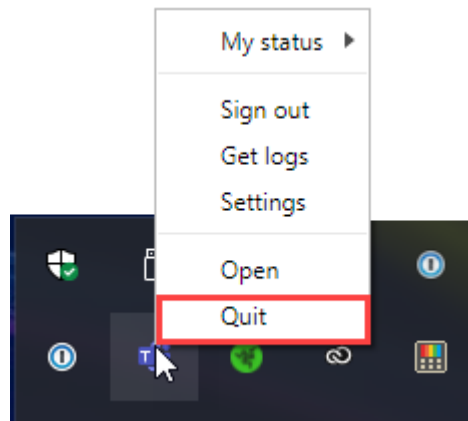
Please zoom to 125% for your Edge browser, so anything in the Portal can be seen on small screens. Remember this will be post produced in several formats – including for playback on devices (some smaller than others).

If your demo is featuring the Azure portal then please avoid the preview portal, by opening <https://aka.ms/publicportal>

Close Teams

There is nothing worse than having unwanted notifications or messages pop up during your recording. So, make sure you have Teams closed while you do so (unless of course you are featuring teams as part of your demo).

- o Right click the teams icon in your system tray and select “Quit”



Close Outlook

Just like with teams you don't want Outlook interfering with your recording so make sure Outlook is closed.

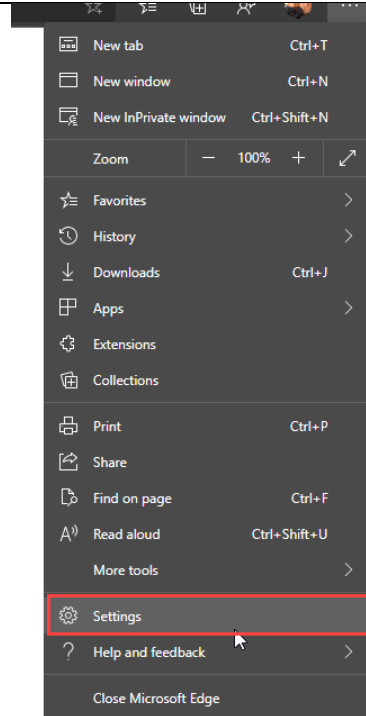
Set home tabs for Microsoft Edge

This is an optional step but one that really does make a world of difference when demoing. Setting your home page tabs on Edge is great especially if you accidentally close Edge during your demo you can open it up and be right back where you need to be.

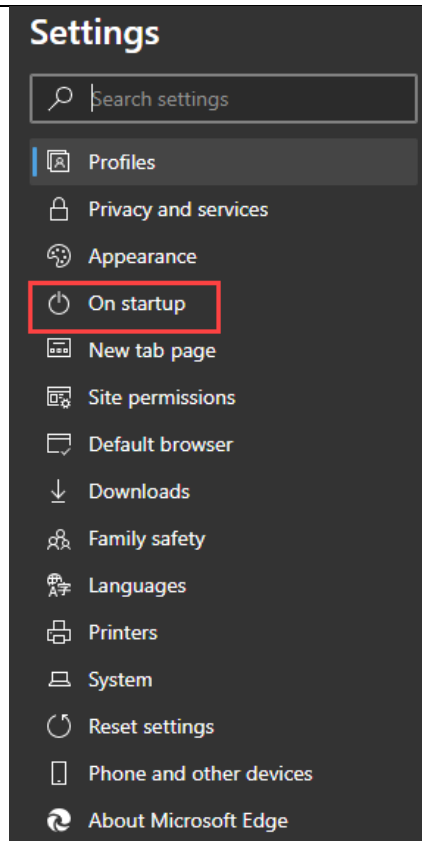
- o Open Microsoft Edge

- o Open all the tabs you need for your demo

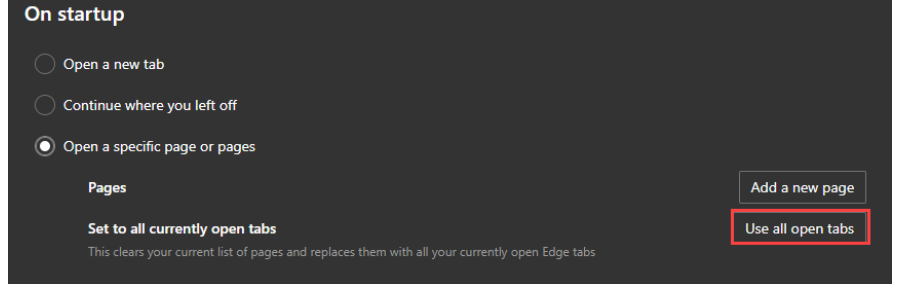
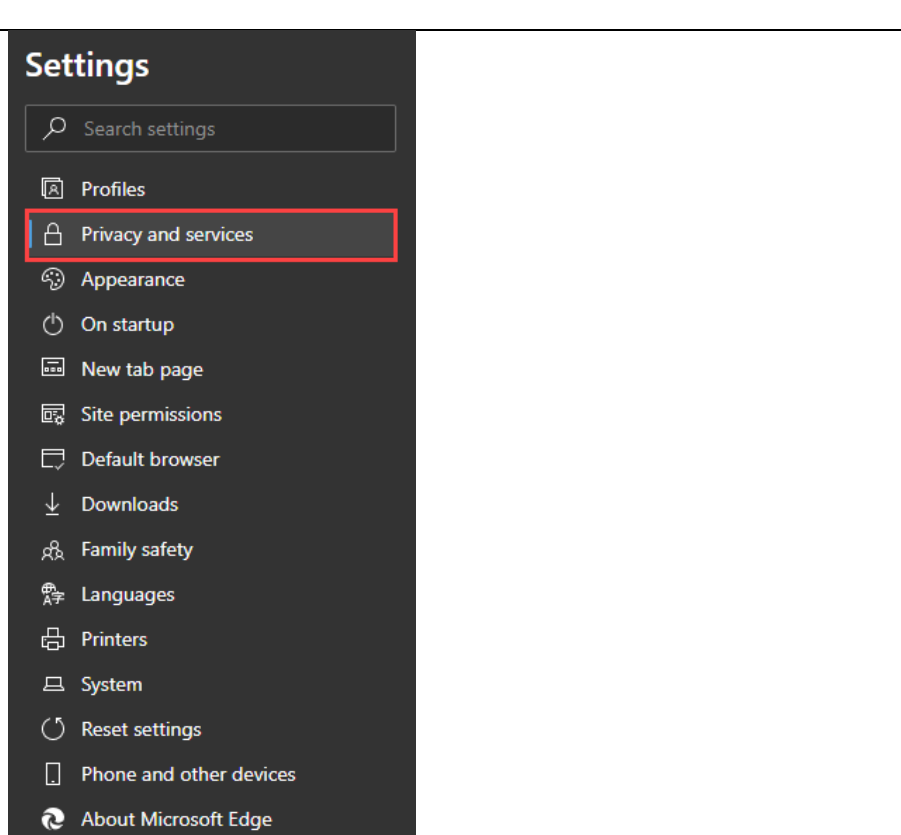
○ Click the ellipse “...” in the top right-hand corner and select settings



○ In the left-hand navigation select “On Startup”



○ Click the “Open a specific page or pages” option

<ul style="list-style-type: none"> ○ Click the “Use all open tabs” button 	 <p>On startup</p> <ul style="list-style-type: none"> <input type="radio"/> Open a new tab <input type="radio"/> Continue where you left off <input checked="" type="radio"/> Open a specific page or pages <p>Pages</p> <p>Set to all currently open tabs This clears your current list of pages and replaces them with all your currently open Edge tabs</p> <p>Add a new page</p> <p>Use all open tabs</p>
<p>Clear your browser history</p>	
<ul style="list-style-type: none"> ○ Open the settings tab in edge ○ Click on “Privacy and services” in the left-hand nav 	 <p>Settings</p> <p>Search settings</p> <ul style="list-style-type: none"> Profiles Privacy and services Appearance On startup New tab page Site permissions Default browser Downloads Family safety Languages Printers System Reset settings Phone and other devices About Microsoft Edge

○ Click the “Choose what to clear” button

Tracking prevention

Websites use trackers to collect info about your browsing. Websites may use this info to improve sites and show you content like personalized ads. Some trackers collect and send your info to sites you haven't visited. [Learn more](#)

Tracking prevention



Basic

- Allows most trackers across all sites
- Content and ads will likely be personalized
- Sites will work as expected
- Blocks known harmful trackers



Balanced

(Recommended)

- Blocks trackers from sites you haven't visited
- Content and ads will likely be less personalized
- Sites will work as expected
- Blocks known harmful trackers



Strict

- Blocks a majority of trackers from all sites
- Content and ads will likely have minimal personalization
- Parts of sites might not work
- Blocks known harmful trackers

Blocked trackers

View the sites that we've blocked from tracking you

Exceptions

Allow all trackers on sites you choose

Always use “Strict” tracking prevention when browsing InPrivate

Clear browsing data

This includes history, passwords, cookies, and more. Only data from this profile will be deleted. [Manage your data](#)

Clear browsing data now

Choose what to clear

Choose what to clear every time you close the browser

○ Click clear now

Clear browsing data

Time range

Last hour



Browsing history

None



Download history

None



Cookies and other site data

From 7 sites. Signs you out of most sites.



Cached images and files

Frees up less than 320 MB. Some sites may load more slowly on your next visit.

This will clear your data across all your synced devices signed in to bewalter@microsoft.com. To clear browsing data from this device only, [turn off sync](#).

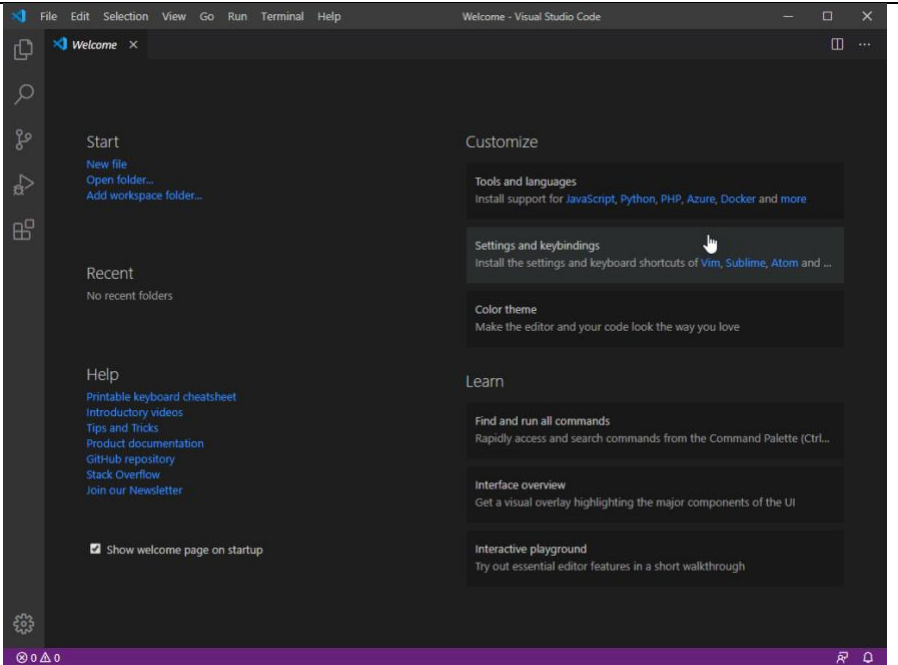
Clear now

Cancel

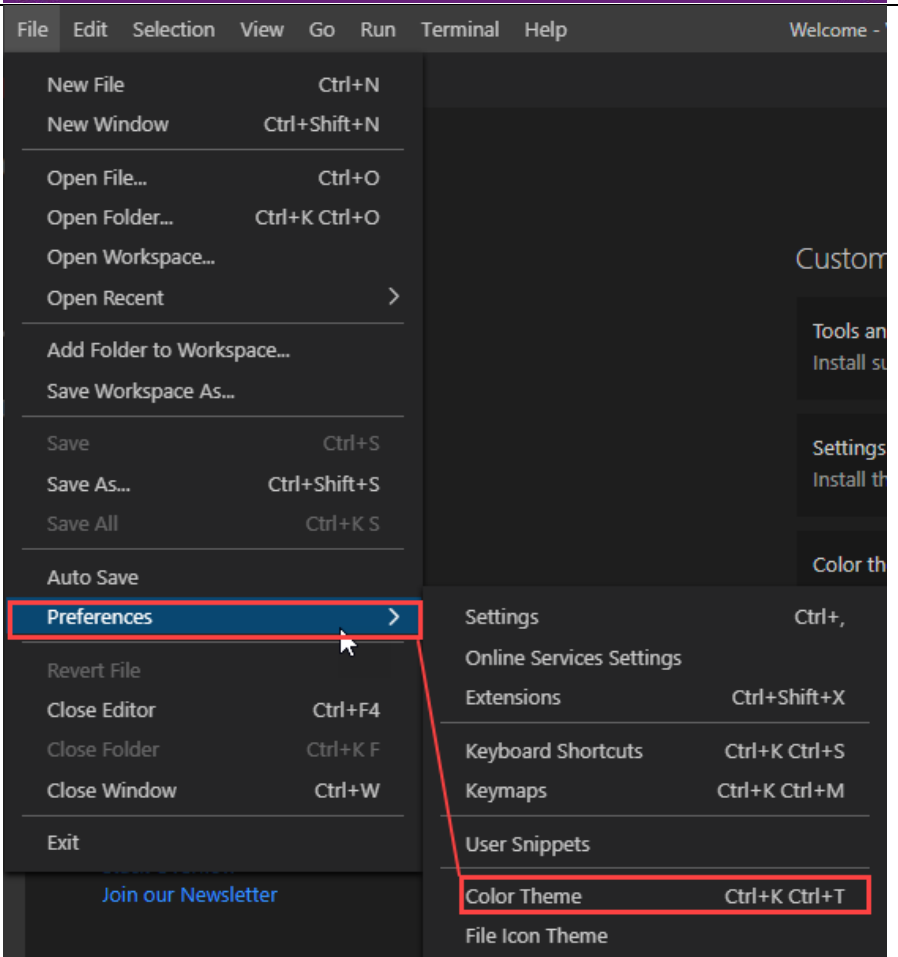
Set VSCode to Light mode

If you are showing code samples and VSCode in any part of your demos set the IDE to light mode.

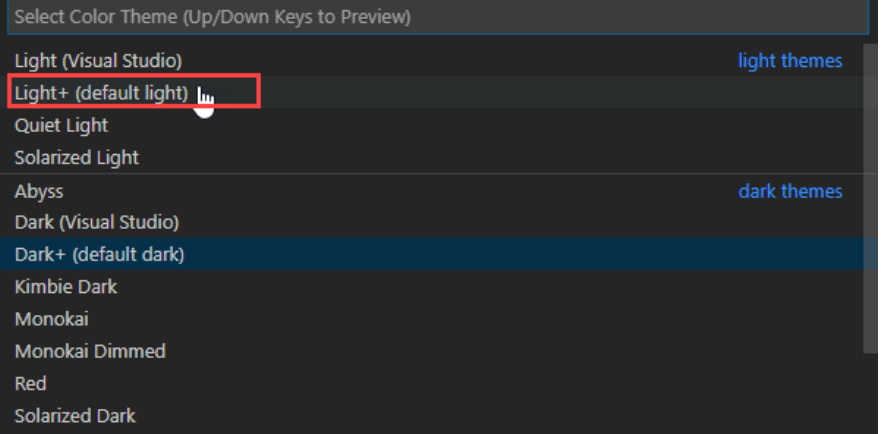
○ Open Visual Studio Code



○ Click File>Preferences>Color Theme



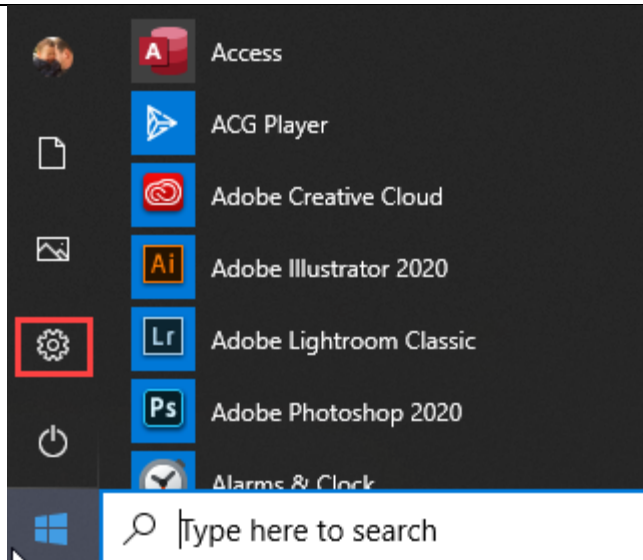
○ Select Light+ (default light)



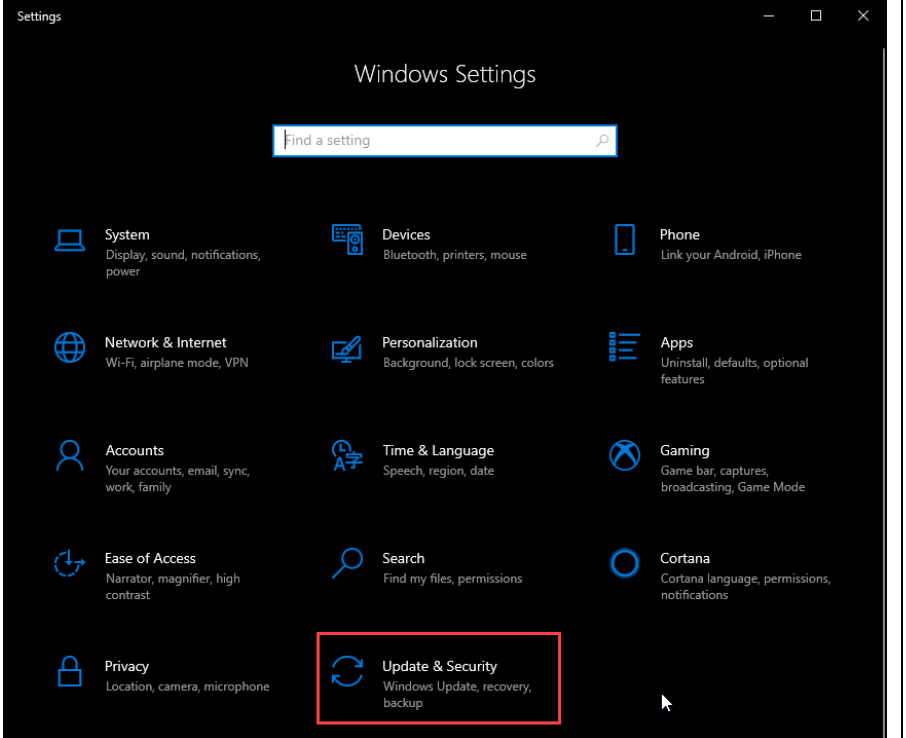
Pause Windows Updates

Having your machine reboot midway through your session can be the worst thing especially when presenting a digital session. Make sure you have paused your Windows updates prior to starting your session

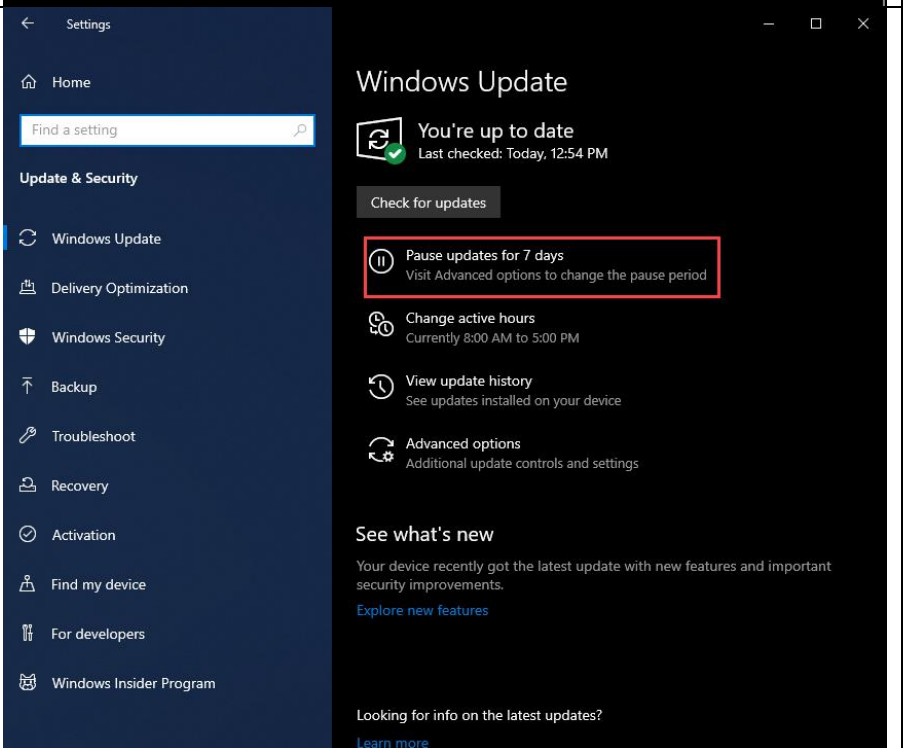
○ Open the start menu and select settings



○ Click on “Update and security “



○ Click on “Pause updates for 7 days”



Mac setup steps

Clean up desktop

A messy desktop can be very distracting to an attendee especially if you're switching between presentation and demo frequently, in addition this some files names, the quickest way to clean up your Mac desktop is to place your files in a folder on the desktop and move them back once you're done recording

Sweep it under the rug:

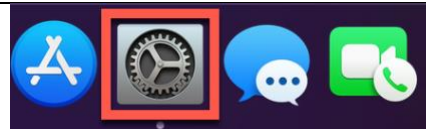
For this simply create a new folder on your desktop called something inconspicuous like "My Files" and drag everything that's on your desktop into this directory then place any specific items you need outside this folder.



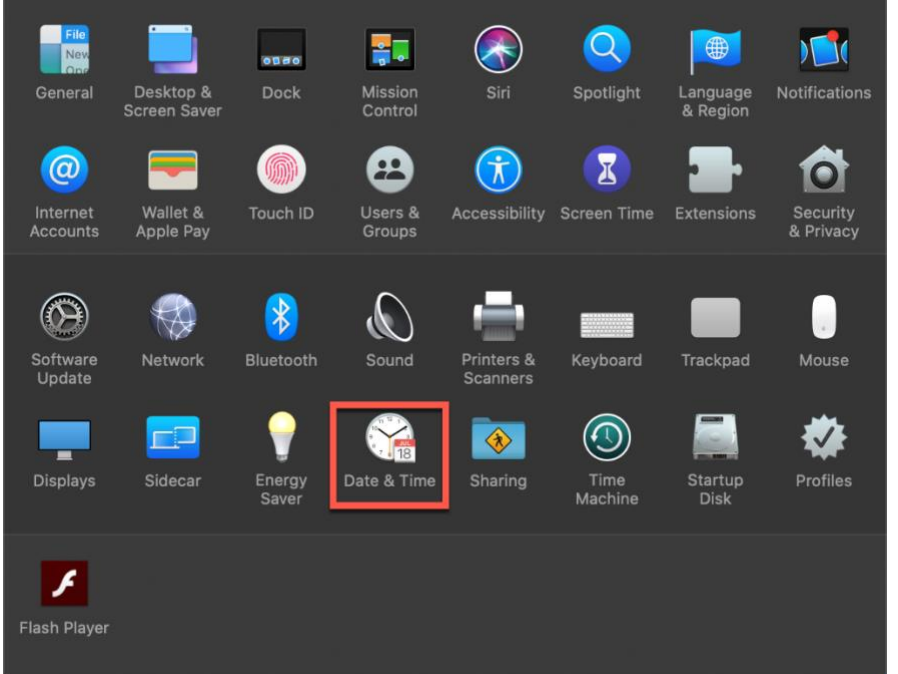
Remove Date and Time from System tray

The date and time in the system tray are a clear give away of when a video was recorded. However, it's very easy to remove this information from the System tray.

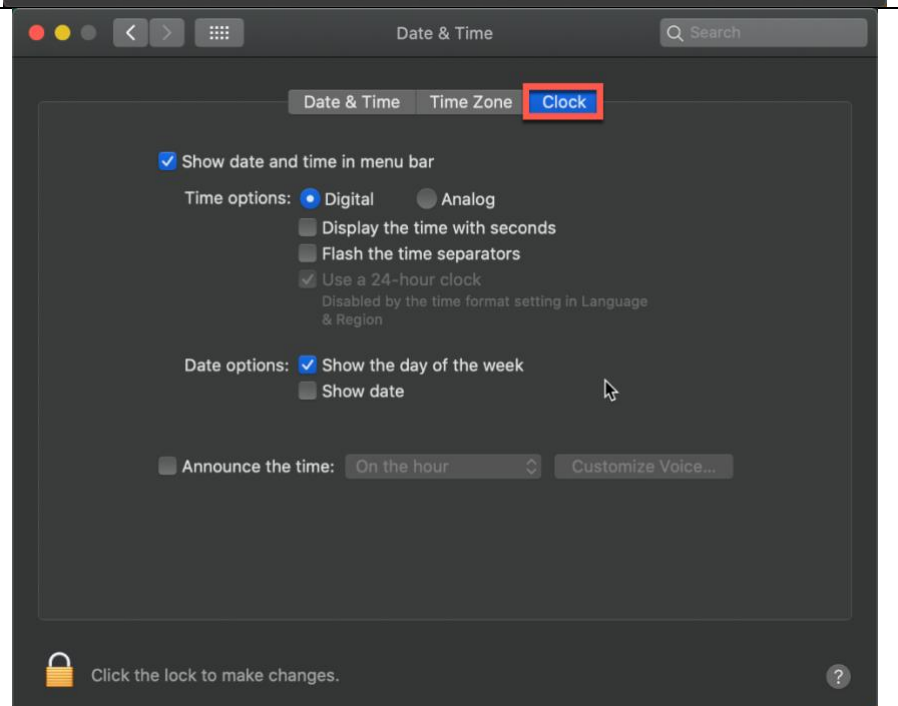
- Open system settings



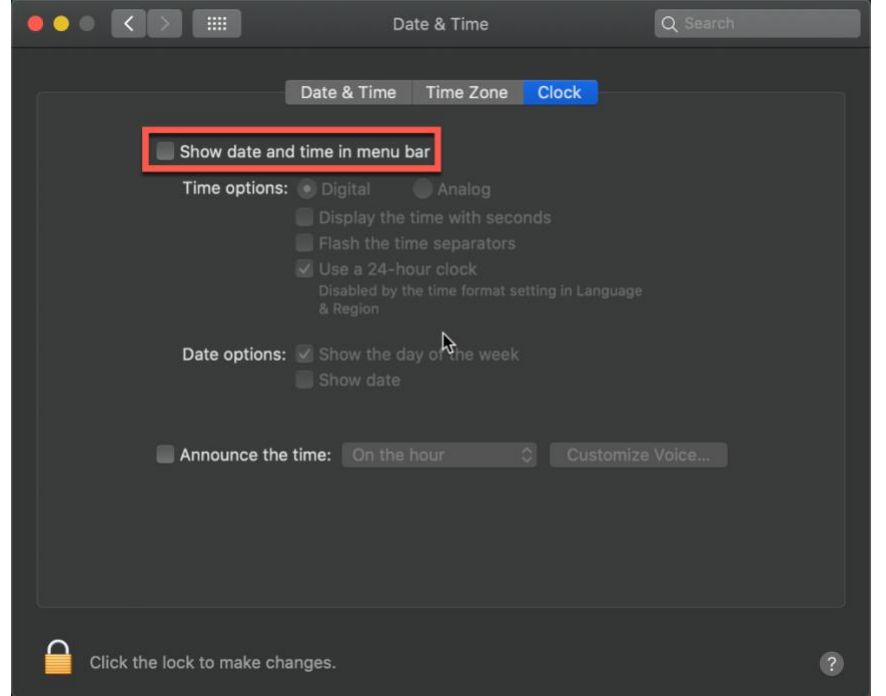
o Click on Date and time



o Click on the clock tab



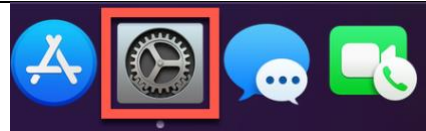
- Clear the checkbox that says “Show date and time in menu bar”



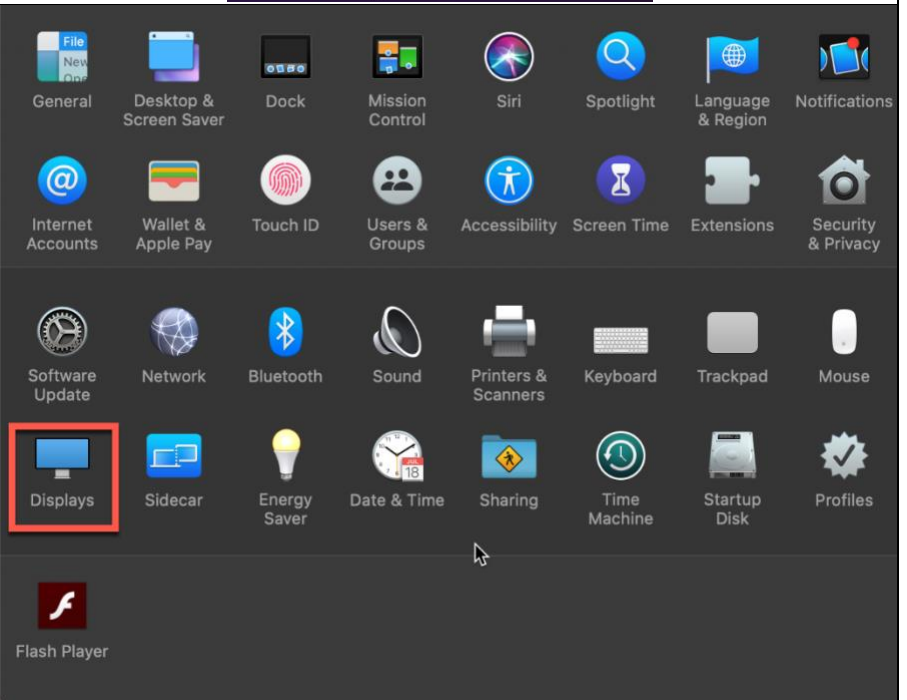
Set display scaling

While there are no specific resolution settings for a Mac you can set the scaling of items on the screen to make them easier to read when recorded.

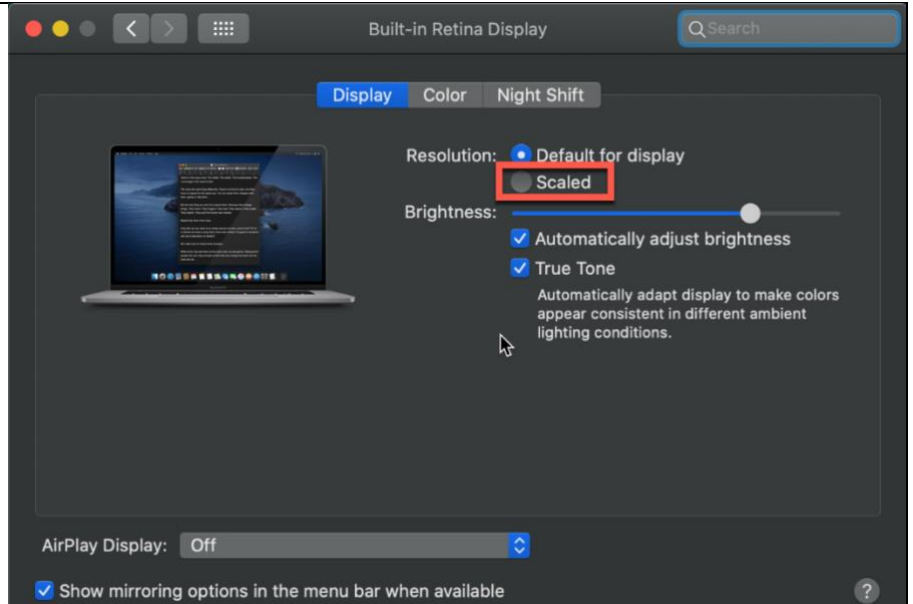
- Open system settings



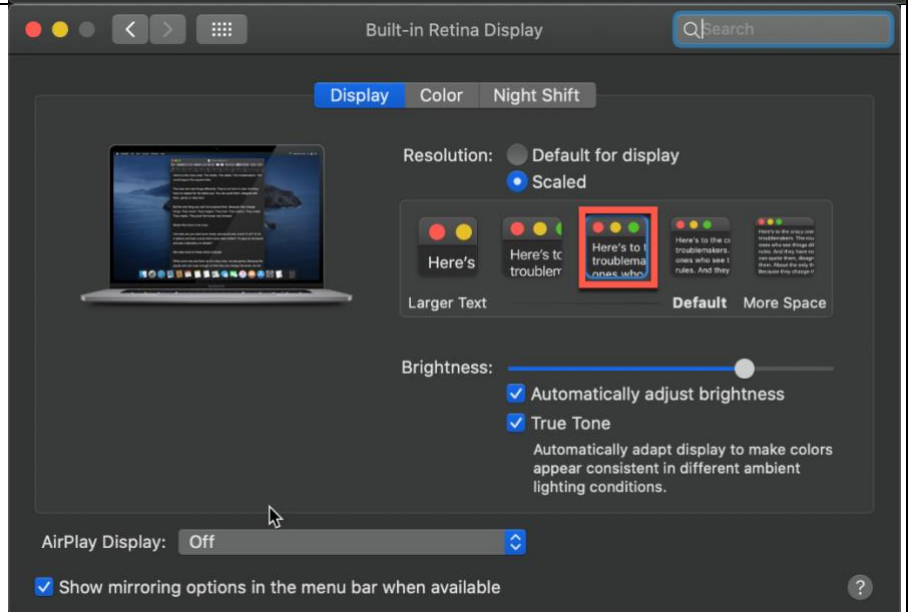
- Select Displays



○ Click the “Scaled” radio button



○ Select the third option from the left to scale your display



Install new Microsoft Edge Brower

It is company policy that any presentation or demo that requires a browser be done with our new Microsoft Edge browser. To install this got to www.microsoft.com/edge

Please zoom to 125% for your Edge browser, so anything in the Portal can be seen on small screens. Remember this will be post produced in several formats – including for playback on devices (some smaller than others).

If your demo is featuring the Azure portal then please avoid the preview portal, by opening <https://aka.ms/publicportal>

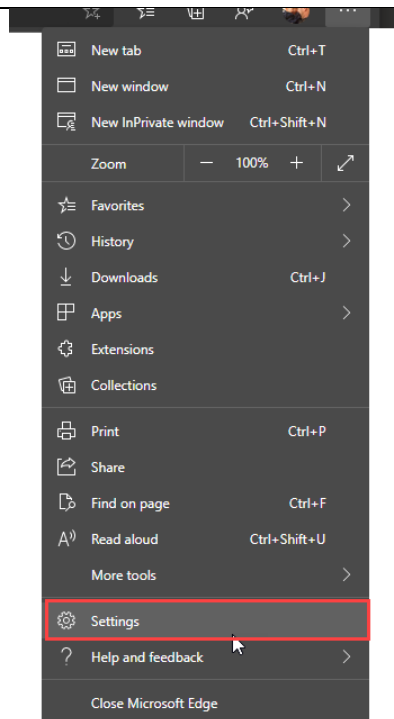
Set home tabs for Microsoft Edge

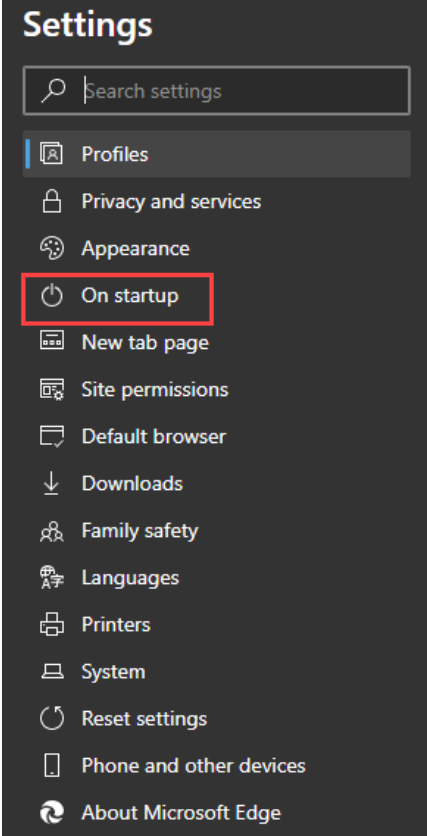
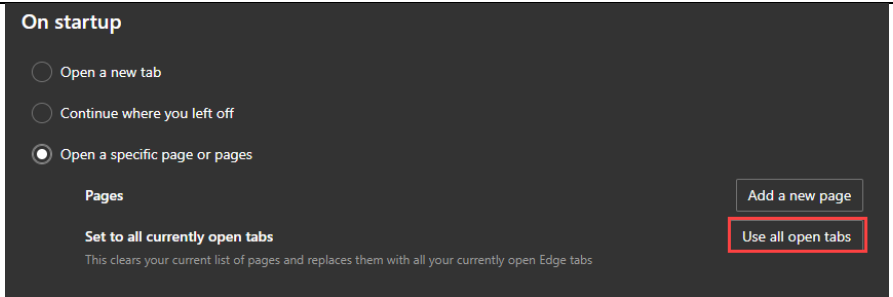
This is an optional step but one that really does make a world of difference when demoing. Setting your home page tabs on Edge is great especially if you accidentally close Edge during your demo you can open it up and be right back where you need to be.

o Open Microsoft Edge

o Open all the tabs you need for your demo


o Click the ellipse “...” in the top right-hand corner and select settings


















<ul style="list-style-type: none"> ○ In the left-hand navigation select “On Startup” 	 <p>The screenshot shows the Windows Settings application with the 'On startup' option highlighted in a red box. The settings list includes Profiles, Privacy and services, Appearance, On startup, New tab page, Site permissions, Default browser, Downloads, Family safety, Languages, Printers, System, Reset settings, Phone and other devices, and About Microsoft Edge.</p>
<ul style="list-style-type: none"> ○ Click the “Open a specific page or pages” option 	
<ul style="list-style-type: none"> ○ Click the “Use all open tabs” button 	 <p>The screenshot shows the 'On startup' settings page. Under the 'Pages' section, the 'Open a specific page or pages' option is selected. At the bottom, the 'Use all open tabs' button is highlighted with a red rectangle. The text 'Set to all currently open tabs' and a descriptive note are also visible.</p>
<p>Clear your browser history</p>	
<ul style="list-style-type: none"> ○ Open the settings tab in edge 	

- Click on “Privacy and services” in the left-hand nav

Settings

 Search settings


-  Profiles
-  Privacy and services
-  Appearance
-  On startup
-  New tab page
-  Site permissions
-  Default browser
-  Downloads
-  Family safety
-  Languages
-  Printers
-  System
-  Reset settings
-  Phone and other devices
-  About Microsoft Edge

- Click the “Choose what to clear” button


Tracking prevention

Websites use trackers to collect info about your browsing. Websites may use this info to improve sites and show you content like personalized ads. Some trackers collect and send your info to sites you haven't visited. [Learn more](#)


Tracking prevention

 **Basic**

- Allows most trackers across all sites
- Content and ads will likely be personalized
- Sites will work as expected
- Blocks known harmful trackers

 **Balanced**
(Recommended)

- Blocks trackers from sites you haven't visited
- Content and ads will likely be less personalized
- Sites will work as expected
- Blocks known harmful trackers

 **Strict**

- Blocks a majority of trackers from all sites
- Content and ads will likely have minimal personalization
- Parts of sites might not work
- Blocks known harmful trackers

Blocked trackers

View the sites that we've blocked from tracking you >

Exceptions

Allow all trackers on sites you choose >

Always use "Strict" tracking prevention when browsing InPrivate



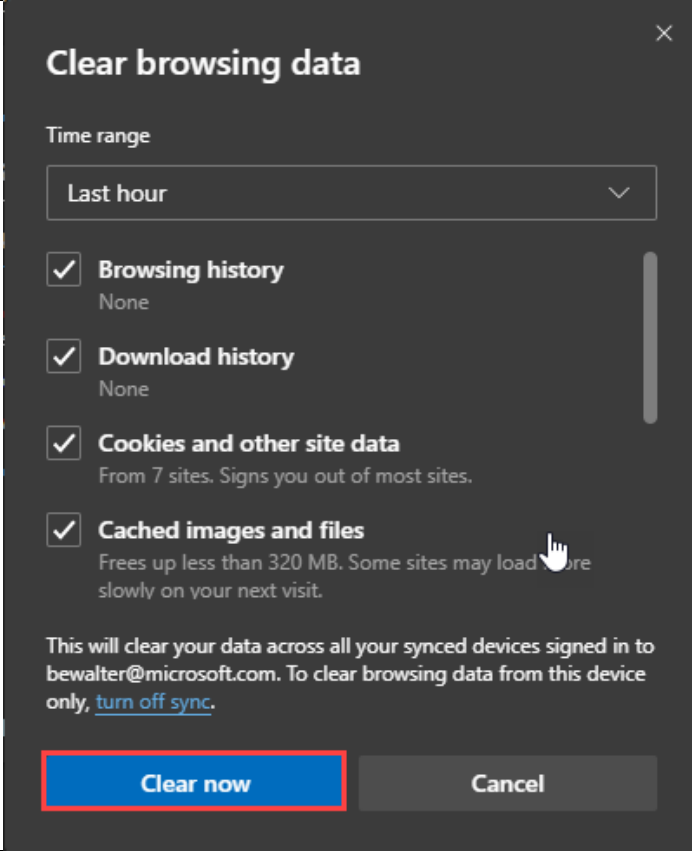
Clear browsing data

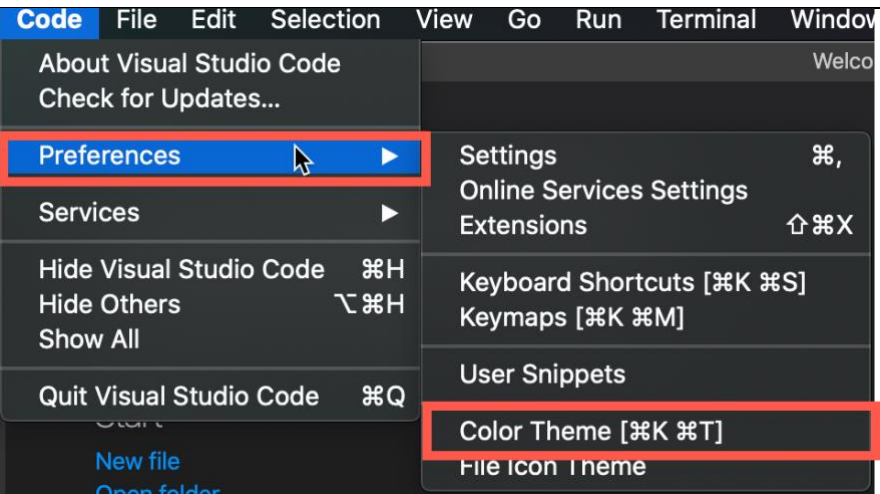
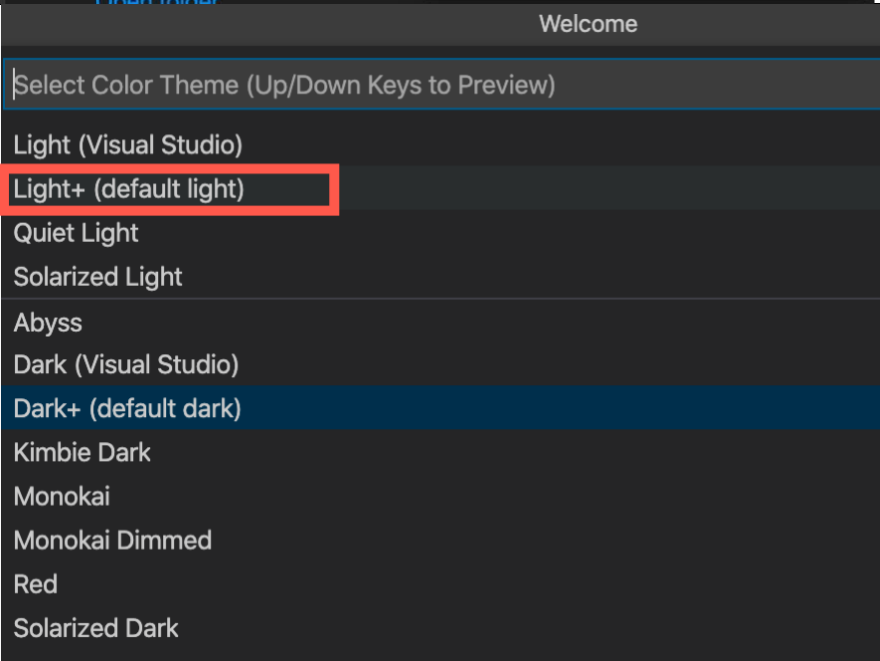
This includes history, passwords, cookies, and more. Only data from this profile will be deleted. [Manage your data](#)

Clear browsing data now

Choose what to clear

Choose what to clear every time you close the browser >

<ul style="list-style-type: none"> ○ Click clear now 	 <p>The screenshot shows a 'Clear browsing data' dialog box. At the top, it says 'Clear browsing data' with a close button (X). Below that is a 'Time range' dropdown menu set to 'Last hour'. There are four checked items: 'Browsing history' (None), 'Download history' (None), 'Cookies and other site data' (From 7 sites. Signs you out of most sites.), and 'Cached images and files' (Frees up less than 320 MB. Some sites may load more slowly on your next visit.). At the bottom, there is a blue 'Clear now' button with a red border and a grey 'Cancel' button. A warning message states: 'This will clear your data across all your synced devices signed in to bewalter@microsoft.com. To clear browsing data from this device only, turn off sync.'</p>
<p>Close Teams</p> <p>There is nothing worse than having unwanted notifications or messages pop up during your recording. So, make sure you have Teams closed while you do so (unless of course you are featuring teams as part of your demo). Press Command+Q to close Teams.</p>	
<p>Close Outlook</p> <p>Just like with Teams you don't want Outlook interfering with your recording so make sure Outlook is closed. The best way to do this is to press Command+Q to make sure Outlook closes fully</p>	
<p>Set VSCode to Light mode</p> <p>If you are showing code samples and VSCode in any part of your demos set the IDE to light mode.</p>	
<ul style="list-style-type: none"> ○ Open Visual Studio Code 	

<p>○ From the Code menu select Preferences>Color Theme</p>	 <p>The screenshot shows the 'Code' menu in Visual Studio Code. The 'Preferences' option is highlighted with a red rectangle. A submenu is open, showing 'Settings', 'Online Services Settings', 'Extensions', 'Keyboard Shortcuts', 'Keymaps', 'User Snippets', 'Color Theme', and 'File Icon Theme'. The 'Color Theme' option is also highlighted with a red rectangle. The background shows the 'Welcome' screen with options like 'New file' and 'Open folder'.</p>
<p>○ Select "Light+ (default light)"</p>	 <p>The screenshot shows the 'Select Color Theme' dialog box. The title bar says 'Select Color Theme (Up/Down Keys to Preview)'. The list of themes includes 'Light (Visual Studio)', 'Light+ (default light)', 'Quiet Light', 'Solarized Light', 'Abyss', 'Dark (Visual Studio)', 'Dark+ (default dark)', 'Kimbie Dark', 'Monokai', 'Monokai Dimmed', 'Red', and 'Solarized Dark'. The 'Light+ (default light)' theme is highlighted with a red rectangle. The background shows the 'Welcome' screen.</p>

Presentation Best Practices

Background Setting

Make sure there is nothing distracting behind you when recording. Remove all personal items, trademarks, copyrighted images, company logos, etc. Put some distance between you and the wall behind you.

Personal Appearance

Choose clothing that is business casual as you would when presenting onsite. Small stripes and plaid can create an effect called “Moray” that can be distracting in a video feed. We want you to feel comfortable but professional in your appearance. Microsoft-branded polos, t-shirts and hoodies are acceptable.



Moray Effect

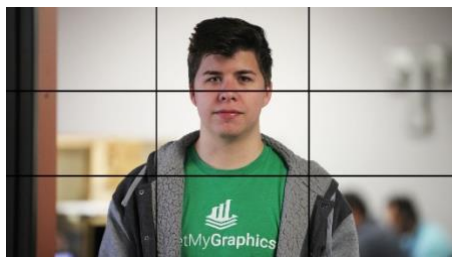
Camera Framing

A digital delivery is much more intimate than presenting on stage. Consider that you are much closer to attendees when presenting. Given this proximity taking time to look directly at the camera when presenting is important as it will help build a connection with your audience.

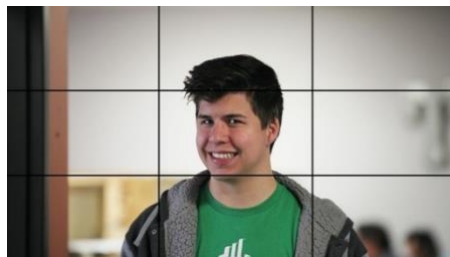
Set up your shot so that you are adhering to the rule of thirds. You do not want to be too close or too far from the camera, and you want your eyes in the upper third of the shot. Not only does this provide good framing, but it allows for spacing below to insert any lower thirds or graphics that might need to be added.

To learn more about the “rule of thirds” watch this [short video](#).

Good framing:



Bad Framing:



Here is an [article](#) that explains why proper framing is important.

Delivering a great demo

When it comes to delivering a great demo either on stage or digitally there are some steps you can take to ensure your demo is received as best as possible

Set your Zoom level

We noted earlier on Windows and Mac how you can set your zoom level on your device to make sure your demo is more easily read. You can also take advantage of tools like “ZoomIt” on windows that allow you to zoom the portion of your screen where your mouse is currently located.

If you don’t have it already you can download Zoomit for Windows from <https://aka.ms/zoomit>

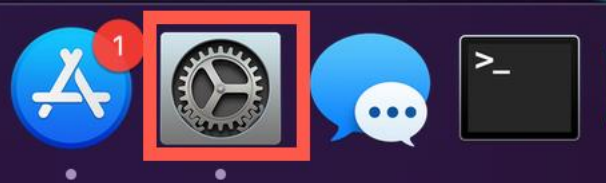
There is also a great [video](#) created by our very own Donovan Brown on how to setup and use this little app to its fullest potential

If you’re using a Mac to present your demo there is unfortunately not a “Zoomit” equivalent app, but you can utilize the accessibility within the OS to allow you to zoom the window while presenting

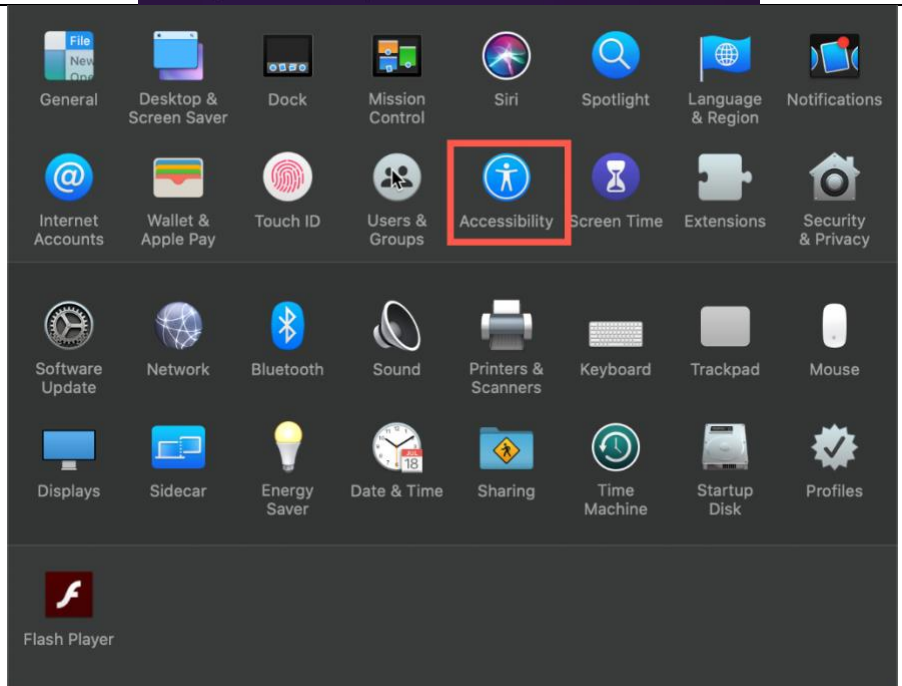
Turn on Zoom option in Mac

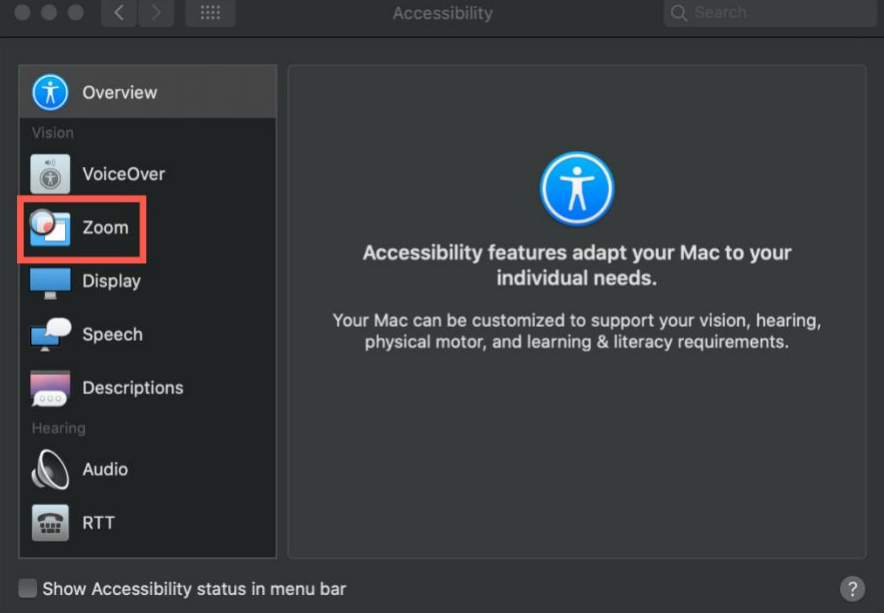
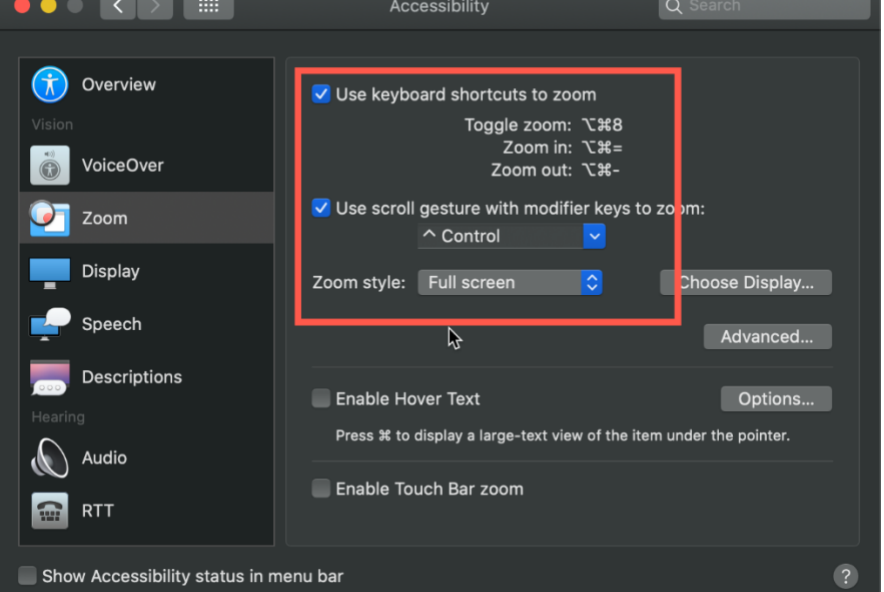
To use the OS Zoom feature on Mac take the following steps

- Open System Preferences



- Click on Accessibility



<ul style="list-style-type: none"> ○ Click on Zoom 	 <p>The screenshot shows the macOS Accessibility window. The left sidebar contains a list of categories: Overview, Vision, VoiceOver, Zoom, Display, Speech, Descriptions, Hearing, Audio, and RTT. The 'Zoom' category is highlighted with a red rectangular box.</p>
<ul style="list-style-type: none"> ○ Select to use either Keyboard Short cut or Gesture Zoom Option 	 <p>The screenshot shows the macOS Accessibility window with the 'Zoom' settings. A red rectangular box highlights the following options: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Use keyboard shortcuts to zoom <ul style="list-style-type: none"> Toggle zoom: ⌘⌘8 Zoom in: ⌘⌘= Zoom out: ⌘⌘- <input checked="" type="checkbox"/> Use scroll gesture with modifier keys to zoom: <ul style="list-style-type: none"> Control (dropdown menu) Zoom style: Full screen (dropdown menu) There are also buttons for 'Choose Display...', 'Advanced...', and 'Options...'.</p>

Lastly with your zoom settings ready to go, take some time and practice your demo, including when and where you will zoom into your screen. Remember if you're constantly zooming in and out for the entire demo it's going to make things harder to follow. Use sparingly and to highlight key portions of your demo rather than zooming on every aspect of your demo.

Plan on how to talk to your demo

One thing that can make a demo insanely difficult to follow is when a presenter is unable to reference the interface or what's happening on screen effectively. When you're delivering a demo avoid terms like "over here you can see" or "this bit when I click it"

Take some time to plan your demo and refer to controls or areas of your screen by name e.g.

" If you look at the left rail in teams, I can navigate to Activity, Chat, Teams, Calendar, Calls and Files. If I click the ellipses "... " in the left rail, I can also access other apps available to me"

You'll notice in the example above each part of the interface is referenced clearly. If a control doesn't have a name, then start with the location and use the general name for the control for example

"If you look in the top right corner you can see I have a button that has a little camera icon on it I can use this to make a video call"

Don't direct with your mouse

This is something that even the most seasoned presenters still get caught out by, when demoing an erratic mouse movement can be super distracting to what's happening. If you are using your mouse to point to something on screen move your mouse to the location, then remove your hand from the mouse while you talk.

Don't use your mouse in a circle motion to indicate an area on screen as this often detracts from what you're trying to draw focus to.

Appendix & Resources

Resources

Scott Hanselman has some great resources on his blog on how to set yourself up for success when presenting online.

[The 2020 Guide to creating quality technical screencast presentations](#)

[Take remote worker educator webcam video calls to the next level](#)