Getting Started With Articulate Storyline

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Welcome to Articulate Storyline! This guide will get you up to speed on using Storyline to create great e-learning, quickly and easily. If you have more questions, tap into the superpowers of the Articulate community by starting a discussion on E-Learning Heroes or reviewing our in-depth product tutorials. We're here to help!

In this guide, you'll learn how to:

- Create your first project
- Enhance your slides with multimedia and narration
- Add interactivity with buttons, states, triggers, and layers
- Record a software simulation
- Add a quiz
- Publish your course

Articulate Storyline is a powerful e-learning authoring tool that's easy enough for beginners. It's a slide-based application with an intuitive interface that looks and feels familiar. Let's jump in and see how you can quickly and easily create your first project with Storyline.

Creating Your First Project

Launch the Software

To get started, you'll need to launch Storyline by double-clicking the icon on your desktop.

Getting Oriented

When you launch Storyline there are several options available to you. Click the **New Project** link to launch a new .story project in what's called **Story View.** In Story View you can see all the slides in your course, organized into what are called Scenes.
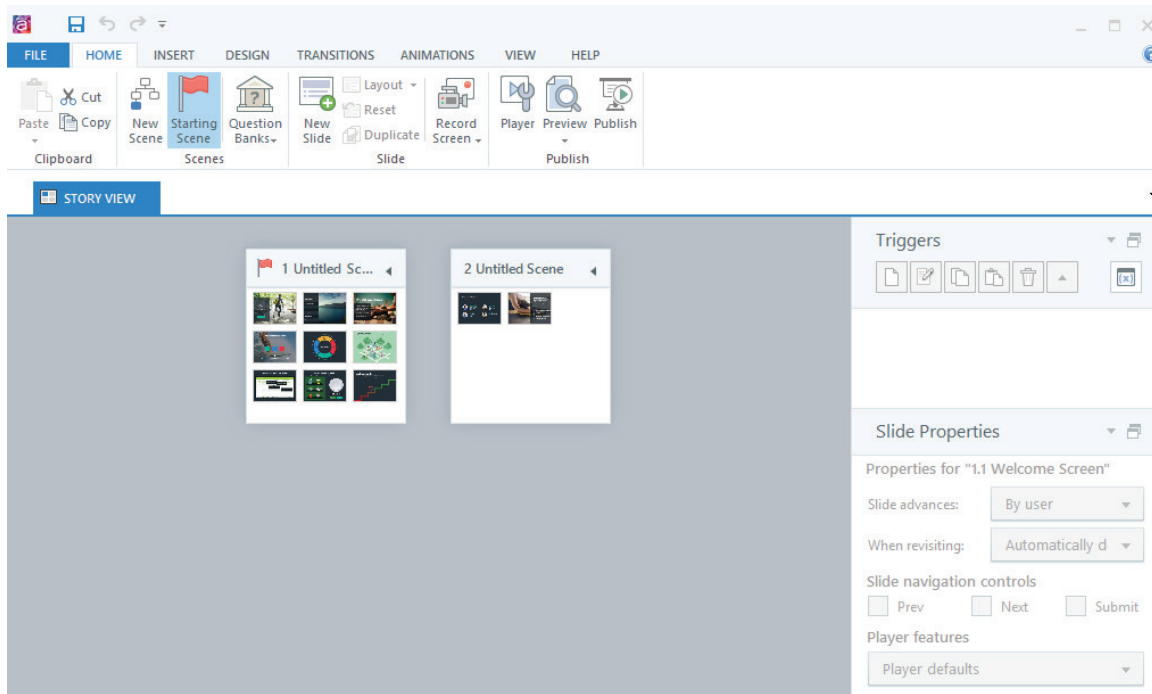
Story View displays your slides, organized into scenes.

Double-click on a slide to open it up in Slide View, which is where you'll be doing most of your work in Storyline.

Once in Slide View, you'll see a familiar ribbon across the top of the application, as well as several panels along the right side and bottom of the application. The panels are dockable, which means you can customize the workspace by moving the panels anywhere you want, even to a second monitor. This frees up more room to view your slides and work with your content.
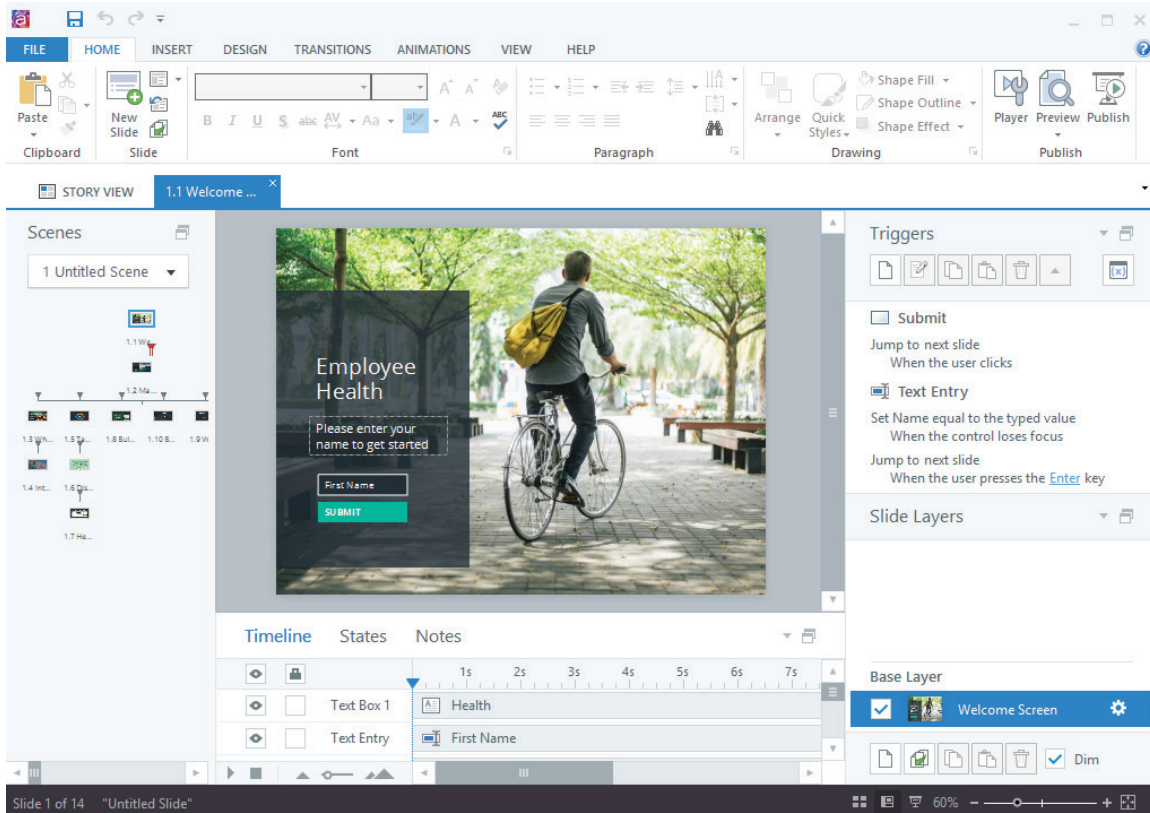
Slide View is where you'll be doing most of your work.

Create a Project

The first step in creating a Storyline project is to build out your slides using the basic options available on the **Insert** tab of the ribbon, such as text boxes, pictures, and shapes. You can get a jump start on creating a compelling visual look by applying a theme or downloading free templates from E-Learning Heroes.
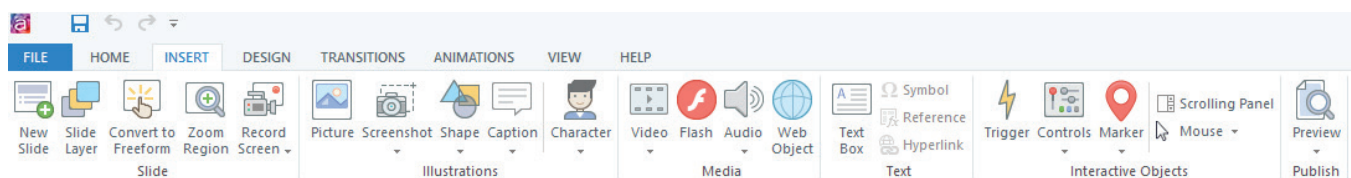
Use the Insert tab to add pictures, shapes, captions and more.

Take note that every object you add to your slide appears as an object on the Timeline panel at the bottom of the application. The Timeline is an important feature: it's used to adjust the timing of objects on the screen, and it also controls the order of your objects.

Objects appear in the Timeline in the same order in which they're layered on your slide. Topmost items are closest to the front, or top, layer of the slide. To change the layering order, select an item on the timeline and drag it up or down in the list.
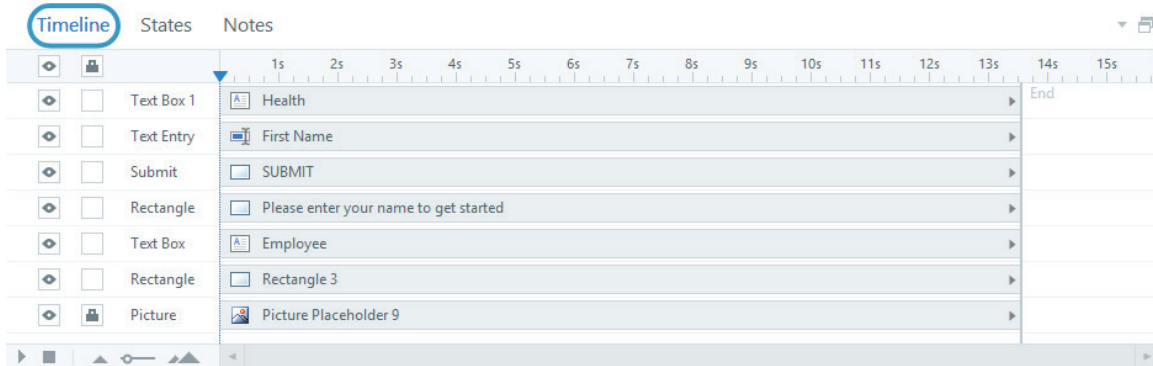
The Timeline controls the timing and order of objects on a slide.

As you build your slides, make sure to save your work to your local hard drive. Working on a network drive or external drive (like a USB) can cause erratic project behavior.

Enhancing Your Slides

Once you have basic content on your slides, you can start adding rich e-learning elements. Let's find out how you can easily enhance your slides with video, narration, characters, and interactivity.

Insert a Video

Videos are a great way to show learners how to do something—whether it's using new software or selecting the right workplace safety gear. They're also useful for adding personality to your course. Watching someone you can relate to is usually more interesting than reading a list of bullets.

You can add an existing video to your Storyline project from a video file or a website. To add a video file in virtually any format, click the **Video** button on the **Insert** tab of the ribbon, select **Video from File**, browse to the video you want to use, and click **Open**. The video will be inserted on your slide.
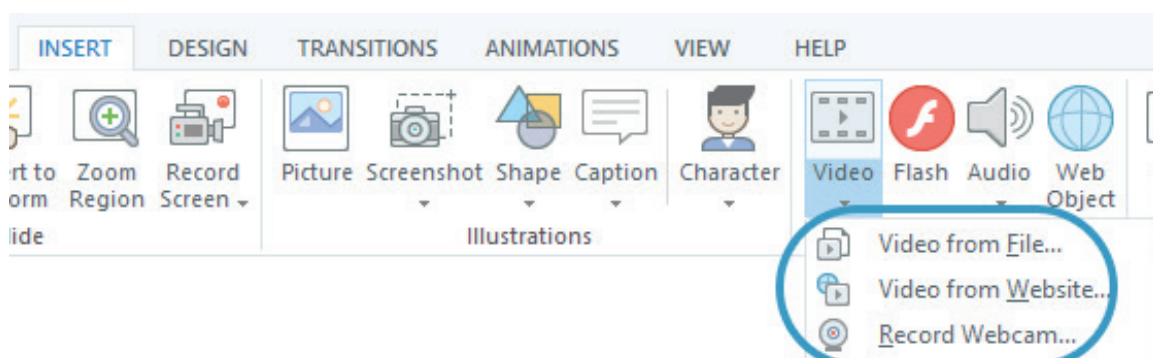
It's just as easy to add a video from a website such as Screenr or Vimeo. First, you'll need the embed code. Don't worry, it's easy to find. Here's how:

* **Screenr:** Look for "share this screencast" to the right of your video. Click inside the **Embed** box, then copy the code provided in the pop-up window.
* **Vimeo:** Click the **Share** button that appears when you hover your mouse over the video player, then copy the code in the pop-up window.

With the embed code in hand, click the **Video** button on the **Insert** ribbon again, but this time choose **Video from Website.** Then paste the embed code into the **Insert Video from Website** box and click **Insert.**
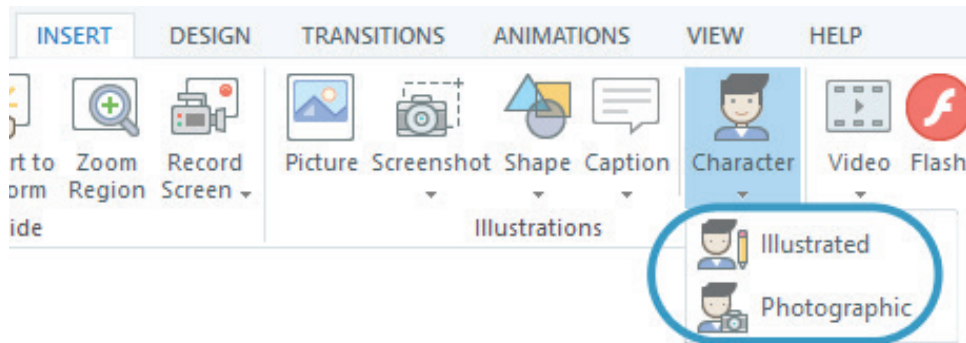
Add a Character

Characters are a great way to help learners connect with course material; as social creatures, we tend to love people. Characters work particularly well for soft-skills- or scenario-based e-learning courses, and the good news is that you don't have to hunt online for characters. Storyline comes with more than 45,000 photographic and illustrated characters, expressions, and poses. You can insert them right from the **Insert** tab on the ribbon.

Click the **Character** button, then select **Illustrated** or **Photographic.**

Choose a character with the expression and pose you want, then click **Insert.**

Narrate Your Slides

Looking for a great way to enhance your visual content and engage your audience? You can easily record narration directly in Storyline. To record your own narration, click the **Audio** drop-down arrow on the **Insert** tab of the ribbon, and choose **Record Mic.** This will launch the microphone recorder.
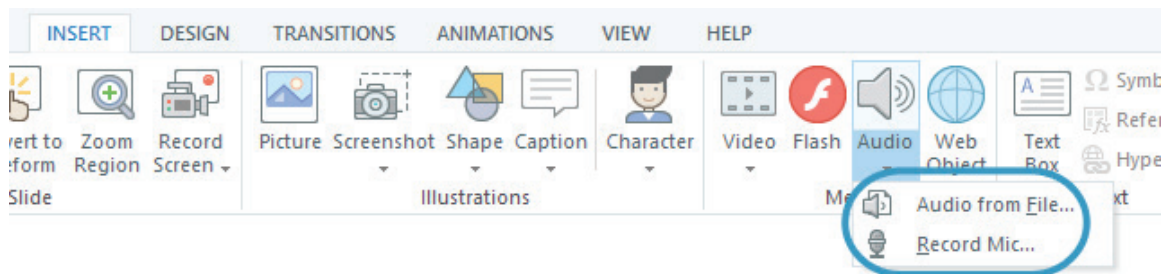
When you're ready, click the **Recording** icon and start talking! Storyline will record until you click the stop button. When you're all done, click **Save** and the audio will be added to the timeline.

Adding Interactivity

The best courses transform your learners from passive viewers to active participants. And there's no quicker way to do that than by building interactivity into your courses.

Storyline comes with lots of great features that make it easy to build interactivity. Let's take a peek at how you work with them.

Create a New State

You'll find the States tab located along the bottom of the screen, right next to the Timeline tab. States are a very powerful feature of Storyline that can be added to a variety of objects, such as shapes, characters, and buttons. What they do is provide different views of the same object.


Select a shape to view its states.

To understand states let's consider Storyline buttons, which come with predefined states. One of these states is called the Hover state—it defines how the button looks when the mouse is hovered over it. Buttons also have a Visited state, which is how the button looks once it has been clicked.
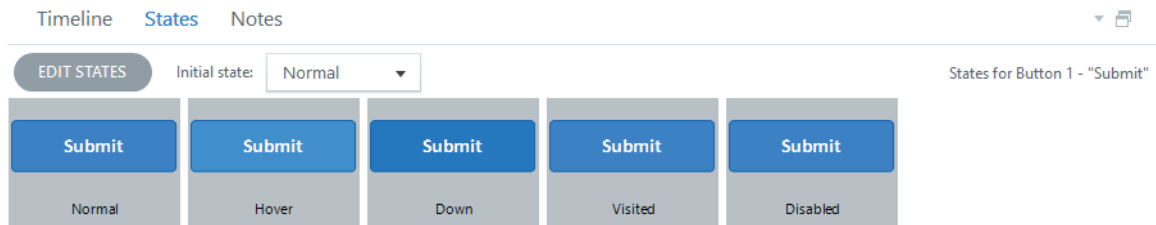
Buttons have five predefined states.

To add a state to an object without predefined states—for example, a photographic character—start by selecting the object. On the **States** tab, click **Edit States**, then click **New State.** You can select a predefined state from the drop-down; in this case, you'll create a custom state by naming your new state "Angry." Select an angry pose by double-clicking on your photographic character and selecting the **Pose** button on the ribbon. Finally, click the **Done Editing States** button. You've successfully added a new state to an object!
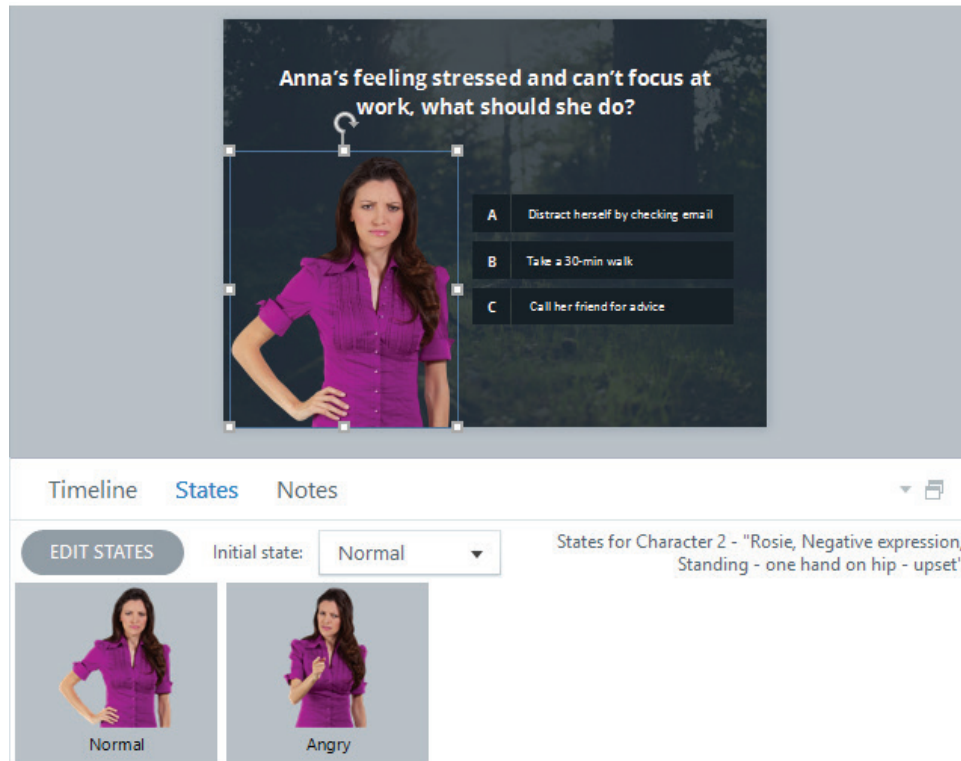
Use the States tab to create a custom state for a photographic character.

Create a New Layer

The Slide Layers panel is located on the bottom right side of the screen. Layers allow you to display additional content on a slide at certain points in your course or in response to the way your learners interact with your content; they're a great way to share a lot of information on one slide without overwhelming the learner, instead you can reveal information one layer at a time.
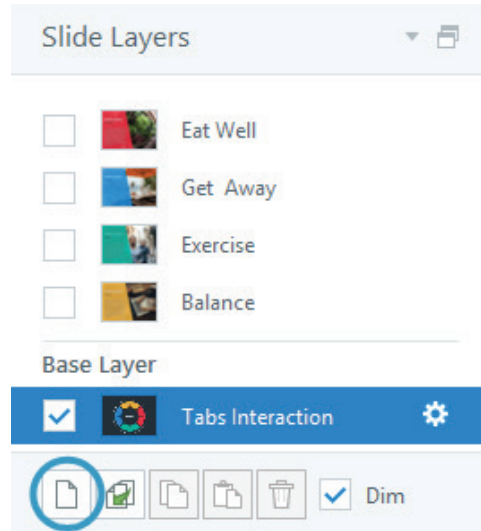
Click the New Layer button.

To add a layer, click the **New Layer** icon at the bottom of the **Slide Layers** panel. Once your new layer has been added, double-click on the title and start typing to rename it.

With the new layer selected, click the **Insert** tab on the ribbon to add a few simple objects to your layer such as an image, some shapes, and a paragraph of text. And, voila! You've created a new layer!

Add Interactive Objects

Looking for a quick and easy way to add interactivity? Using the Interactive Objects on the Insert tab allows you to quickly add markers, buttons, sliders, check-boxes, scrolling panels, and more. Let's add a few of these to see how easy they are to work with.
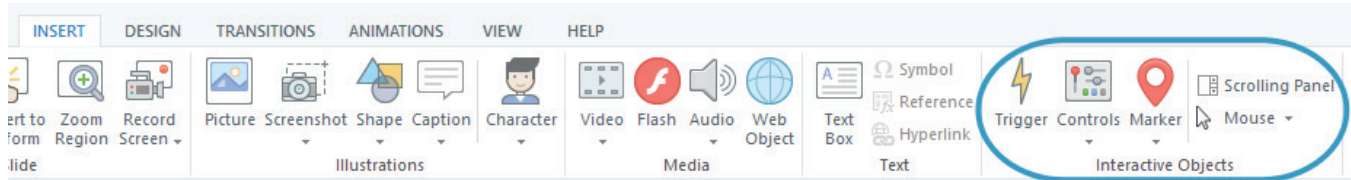
Add a marker by clicking the **Marker** drop-down arrow and selecting the icon you'd like to appear on your marker. Click to add the marker onto the slide and simply type directly in the caption box to add a title and some text. You can click and drag the caption box to adjust where it appears, and format the color and fonts of your marker animation. Adding interactivity is that easy!

Another important interactive feature is buttons. Click the **Controls** drop-down arrow and insert a button on your slide. Type directly on the button to add a label, and use the **Design** tab of the ribbon to format how the button looks.

When you add a button, you'll notice that it appears in the Triggers panel, located on the right-hand side of the screen. Buttons automatically have a trigger associated with them because it's assumed you want an action to occur when the button is clicked—after all, buttons are used to do something. Let's take a closer look at how you add a trigger to a button.
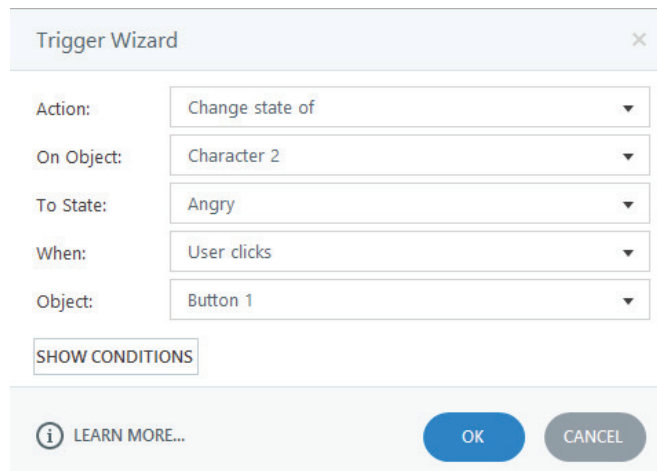
Add a Trigger

Triggers are what cause an action to occur. For example, if you want to display the Angry state you created for your character, or if you want to show the new layer you created, it has to be done with a trigger. Triggers can be added to buttons, shapes, characters, images...just about any object on your slide can have a trigger.

To add a trigger to the button you just created, select the button and click the **Add Trigger** hyperlink in the **Triggers** panel.
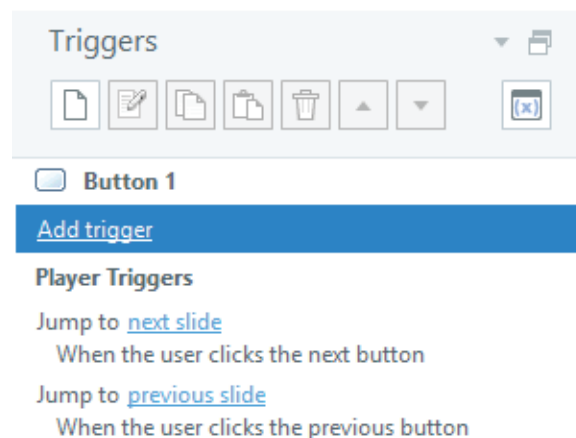
Click Add Trigger to add a trigger to an existing button.

This will launch the Trigger Wizard, which will guide you through the process of setting up your trigger. Use the wizard to decide what action will occur, and when it will occur. For example, to add a trigger that displays the Angry state on the character that you created earlier we would set up our trigger as follows:

Select what happens and when it happens.

Put simply, this trigger is saying "Show the character's Angry state when this button is clicked." That's how simple it is to work with Storyline triggers to build simple interactivity into your course.

Recording a Software Simulation

You'll be amazed by how easy it is to create an interactive software simulation using Storyline.

Prepare to Record

A little preparation can go a long way toward creating a professional-looking software simulation. Here are a few tips:

*   Create an outline or script for your topic to avoid making mistakes while recording.
*   Find a quiet, distraction-free location.
*   Close any unnecessary programs such as email, instant messaging apps, or anything that could pop up onto your screen while you're recording.
*   Open any applications you want to capture in your recording before you start recording.

Launch the Recording Tool

You start your recording by clicking the **Record Screen** button on the ribbon.
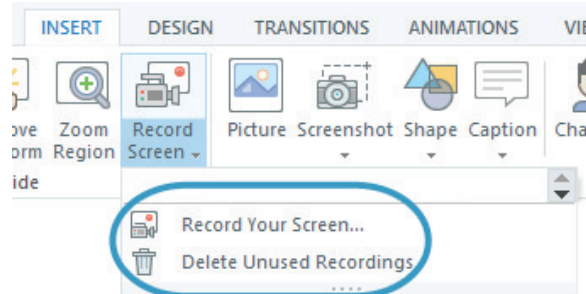
Set Recording Options

After the Recording window appears, select a microphone option, set the size of the recording area, and select a capture size for your webcam if you're using it.

Storyline makes it easy to choose a recording size by offering the two most popular recording sizes and a custom option. In most cases, the default sizes will work great in your projects.

When you need to record an area of the screen that's larger than the default dimensions, you can easily resize the recording box. Just click and drag the resize handle in any corner of the recording area.

Record a Video

When your options are set and you're ready to begin, click the red **Record** button. When you're finished recording, click **Done.**

The great thing about the Storyline recorder is that you record first, *then* choose how you want to use your recording. This means you can re-use the same recording in multiple ways; no need to re-record!
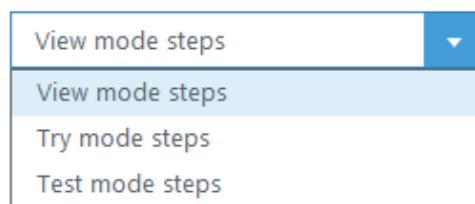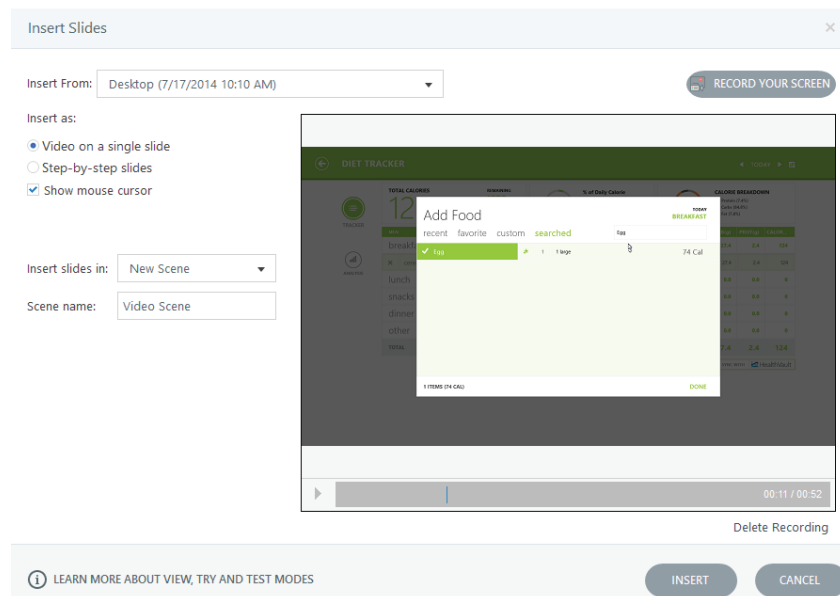

Your recording will be displayed in this window.

When you're done, the recording will appear in a new window where you can choose to insert your recording as a single video on one slide, or have Storyline automatically break down the video into a step-by-step simulation.

If you choose to insert your recording as step-by-step slides, Storyline will automatically add the captions, hotspots, and interactive elements that go with the mode you've selected: View mode, Try mode, or Test mode.

- **View mode:** Use this mode to insert your screen recording as a non-interactive demonstration for your users. It simply allows your users to see a process in action.
- **Try mode:** This mode allows you to insert your screen recording as an ungraded assessment, which is an opportunity for users to test their knowledge.
- **Test mode:** Allows you to insert your screen recording as a graded exam.

Insert as:

○ Video on a single slide

● Step-by-step slides

View mode steps ▼

View mode steps

Try mode steps

Test mode steps

But what if you've inserted a recording as step-by-step slides, then notice that an e-mail notification popped up during the recording. Do you delete and re-record your process? No way! This is when the handy Action Fine Tuning feature comes into play.

Right-click anywhere on the slide that you want to modify and select **Action Fine Tuning** from the menu. From here you can adjust the start and end frames for the part of the video clip displayed on this slide.

Drag the starting and ending markers along the timeline until you have selected the clip you want to keep, then click the **Play** button to preview your changes. When you're done, click **OK.** That's how easy it is to edit recordings with Storyline.

Inserting a Quiz

When you want to know whether learners are mastering your material, a knowledge check is the perfect tool for the job. Storyline comes with 25 types of quizzing slides, in addition to the question bank feature, which makes it easy to build the assessment you want.

Create a New Quiz

To insert a quiz slide, click the **New Slide** button from the **Insert** tab on the ribbon. Click the **Quizzing** tab, where you will find Graded, Survey, and Freeform quizzing slides available.
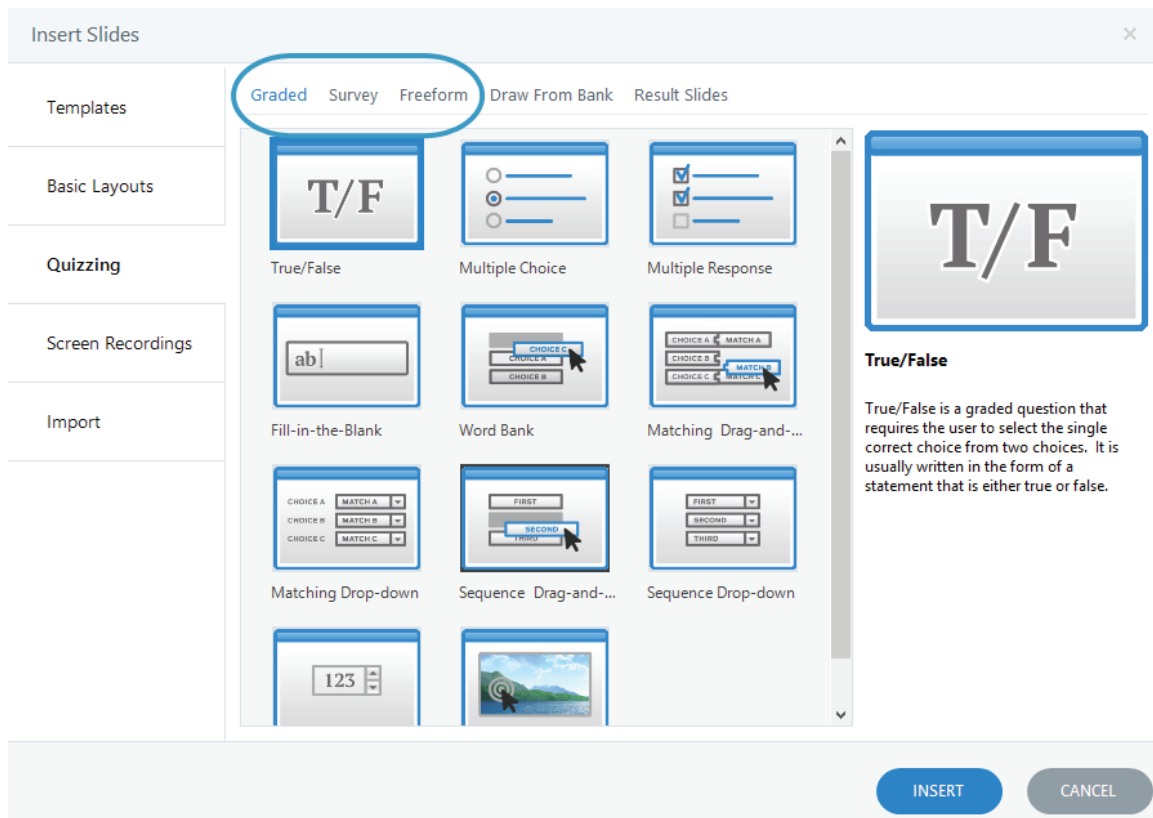
Insert a Multiple-Choice Question

Let's take a look at how you can build one of the most common assessments, a multiple-choice question.

To add a new multiple-choice question to your project, click the **Graded** tab, select the **Multiple-Choice** question type and then click the **Insert** button.

When Form View opens, type your question into the space provided and enter your answer choices below it. At the bottom of the screen, next to the feedback text, assign points for your question. You can even use negative scoring and subtract points for negative answers to discourage guessing and get a clearer picture of learner performance.

Form View guides you through the process of setting up your quiz.

Be sure to select the radio button indicating which answer choice is correct, and click **Save and Close** when you're done.

Insert a Freeform Pick-One Question

Freeform questions are a great way to transform ordinary slide content into interactive questions. We'll show you a pick-one question here, but you'll also want to explore the other types of freeform questions, including drag-and-drop, pick many, text-entry, and hotspot.

A freeform pick-one question is like a multiple-choice question, but instead of using text as answer choices, you can use objects such as pictures, characters, shapes, and captions.

To add a freeform pick-one question to your quiz, click the **Freeform** tab, select the **Pick One** question type, and then click the **Insert** button.
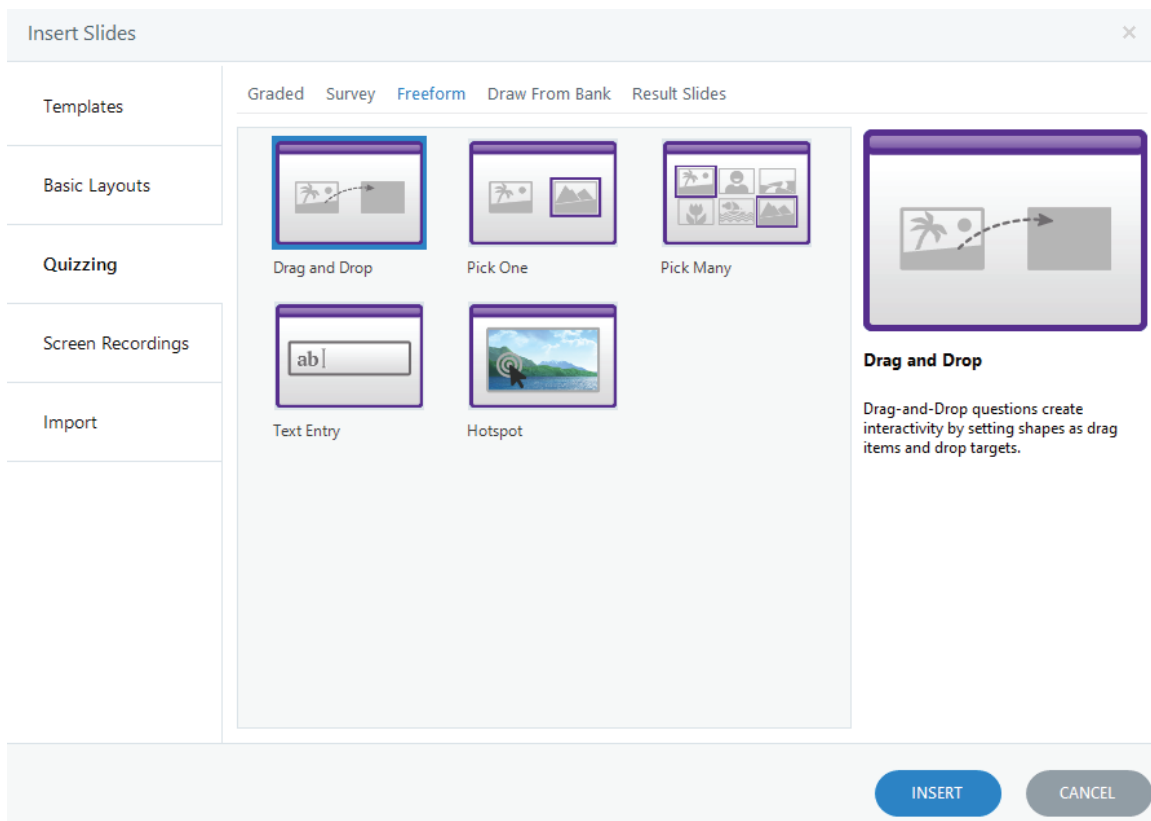
When Slide View opens, add at least two objects (pictures, characters, shapes, etc.) to the slide that can be used as answer choices.

Next, switch to Form View to identify the objects you want to use as answer choices by clicking the drop-downs in the **Choice** column. And don't forget to use the radio buttons to mark the correct answer, and click **Save and Close** when you're done.

Use Form View to identify the answer choices.

Import Questions from Excel

When it comes to quizzing you can save a lot of time by importing questions into Storyline from a Microsoft Excel workbook and a text file.

To import questions from an Excel workbook, start by downloading this template and populating it with your questions and answers (you can follow the instructions in this tutorial). Import the workbook into Storyline by choosing the **File** tab on the ribbon, scrolling to **Import**, and choosing **Questions from File.** Browse to the Excel workbook (XLS or XLSX) and click **Open.** Storyline displays a list of questions from the workbook you selected, and you simply mark the ones you want to import.

Set the Passing Score

To set the passing score for your quiz, you'll need to add a result slide. Insert a **New Slide**, and from the **Quizzing** tab select the **Result Slide** tab. Click **Graded Results**, then click **Insert.**

In the **Result Slides Properties** window, select which question slides to include in the results and set the percentage learners must score to pass your quiz. Click **OK** to insert the slide in your project.

It's important to note that you can have more than one quiz, and more than one result slide, in your Storyline project. This gives you the flexibility to assess your learners before, during, and after the e-learning course, if you so choose.
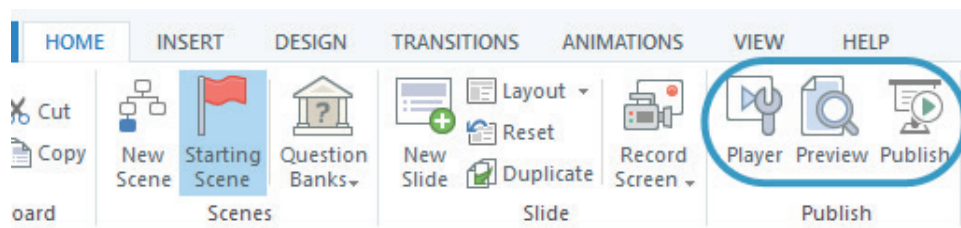
Select the questions to include and the passing score.

Publishing Your Course

When you're ready, the final step is to configure the course player and publish your slides for delivery to your learners.
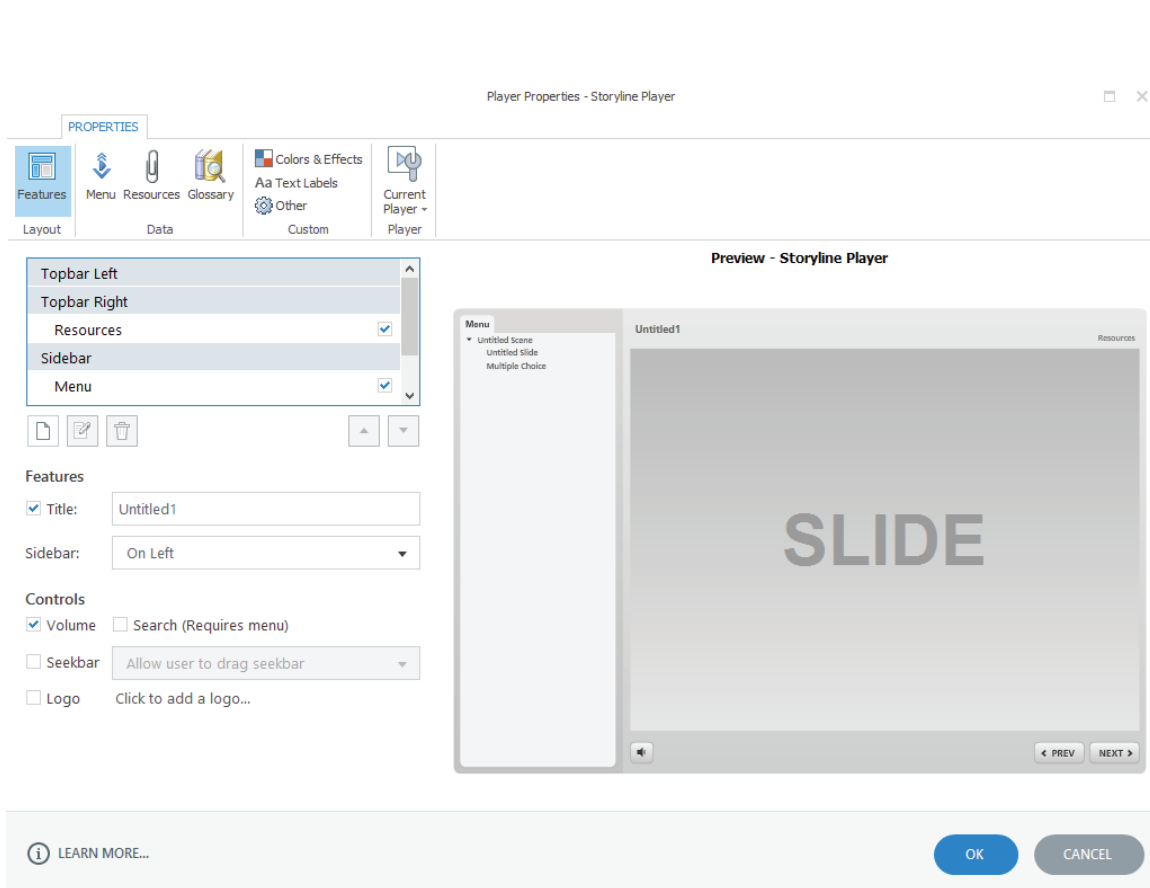

Customize the Player

Storyline wraps your content in a course player. While the default player configuration works great for many projects, you can easily customize the player interface surrounding your slides to create the perfect frame for your content.

Storyline allows you control over many aspects of the player, including the color scheme, navigation settings, display and location of the player elements, and more. Just go to the **Home** tab on the ribbon and click **Player.**

When the **Player Properties** window appears you can customize just about any part of the player, and even save all your changes to share with others or reuse in another project.

Use the Player Properties to customize just about any part of the player.

Preview Your Course

You can easily preview your slides any time you want to take a quick look at the changes you've made to your content—without publishing. While most content will display the same when previewed as it does when it's published, there are a few items that are unavailable when previewing, such as web objects, videos inserted from websites, and hyperlinks.

To preview your course, go to the **Home** tab and click the drop-down arrow below the **Preview** button. Then select your preferred preview option.

Publish for the Web

If you don't need to track learner completion, you can give learners access to your course by publishing it for the web.

If your organization has a learning management system (LMS), be sure to get instructions from your LMS administrator for publishing your course.

More Great Features to Learn About

Variables

Variables are a way to remember information—such as a learner's name or numeric input—and then present dynamic content based on that information. They're also a great way to add conditional interactivity to your course. Storyline offers three types of variables: Text, Number, and True/False.

Variables can be used for many purposes. For example, variables can store text information, calculate a score, or track if a slide has been visited or not. For more help on using variables, check out this [Working with Variables](#) tutorial.

Sliders

Sliders give your learners a new type of control over interactions. Sliders can let learners explore cause-and-effect relationships, manipulate data, and more. To use sliders, you'll need to use variables and triggers. For more help on using sliders, view this [Adding Sliders](#) tutorial.

Entrance and Exit Animations

Animations are a great way to add life and meaning to your course content. When you use them thoughtfully and strategically, animations can help make your content easier to understand, more engaging, and

more professional-looking. Take a look at the [Applying Entrance and Exit Animations](#) tutorial for more help on using these features.

Transitions

Storyline's slide transitions are a nice way to stylize your e-learning content. Transitions can be applied to both slides and layers, and they add a nice animation effect when you go from one slide, or from one layer, to the next. Learn how to give your course a polished look by viewing the [Adding Transitions to Slides and Slide Layers](#) tutorial.

Motion Paths

Motion paths are a great way to add movement and animation to your slide. You can use them to move objects from one part of the screen to another or to create fun games and activities. Motion paths allow your learners to control the motion of objects with their actions. Learn how you can use motion paths in this [Adding Animations](#) tutorial.

E-Learning Heroes Community

Now that you're up to speed on the basics, we encourage you to explore our E-Learning Heroes community often. It's the place to get fast answers to your e-learning questions, step-by-step tutorials for building better courses, advice and opinions from industry experts, and lots of free downloads for your projects.

If you enjoyed this guide, please feel free to link to it from your own site or share this link on social networks.

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