Instructional Design Plan

Creating a Screencast with OBS Studio

Jade Guinoiseau & Alex Cuvelier
TWR 2004

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Creating a Screencast in OBS Studio

This document is the instructional design plan for the Creating a Screencast in OBS Studio teach-a-class for the TWR2201 - Instructional Design and the Tech Communicator Course at Algonquin College.

Part 1: Analyzing and Defining Project Requirements

This section will analyze the tasks and topics of this teach-a-class, examine the learner profiles of the students who will be the participants, identify the learning outcomes, and determine how the learning outcomes will be evaluated.

Task/Topic Analysis

The teach-a-class will cover the topics and the associated tasks outlined in Table 1 below.

Table 1: Topics and Tasks

Topic	Tasks
Using window capture as a source	- Adding a new scene - Adding a new window capture source - Selecting a window to capture
Configuring display regions	- Adjusting the window capture display region - Testing the recording output
Adding on-screen text	- Adding a text source - Configuring the text source
Adding on-screen images	- Adding an image source - Configuring the image source
Recording picture-in-picture	- Adding a new scene - Adding a window capture source - Selecting a window to capture - Adjusting the window capture display region - Adding a video capture device source - Adjusting the video capture display region

The tasks performed by the participants during this teach-a-class will provide them with the basic knowledge and skills needed to record a professional-looking screencast with OBS Studio. The selected tasks will also lay the foundation for learners to explore more advanced options in OBS Studio that will build on these basic functions.

Learner Profiles

This section will cover the learning context in which this teach-a-class will take place, the learning profiles of the participants, and a look at the challenges presented by these factors.

Learning Context

The teach-a-class will be held in an Algonquin College classroom and be restricted to a 45-minute presentation. All participants will be students in the Technical Writer program at Algonquin College. All participants will have access to a laptop on which OBS Studio should be installed before the presentation. There will be an image file that participants will need to download from Brightspace as well. The facilitators will have access to a projector and whiteboard as the only resources available in the classroom to deliver the teach-a-class.

A poll taken in preparation for the teach-a-class showed that out of 14 respondents, the majority had never used OBS Studio. The full breakdown of the poll's results is shown in Table 2 below.

Table 2: Poll responses from the teach-a-class participants

How experienced are you with Open Broadcaster Software (OBS)?		
Response	**Number of participants**	**Percentage of total responses**
Never Used	9	64%
Beginner	3	21%
Intermediate	2	14%
Advanced	0	0%

Participant Learning Styles

The Technical Writer students were surveyed to determine their self-reported Kolb's learning styles to inform the facilitators' decisions about how to implement the teach-a-class. The results of the survey are as follows:

- 7 Divergers (Feel and watch)
- 4 Convergers (Think and Do)
- 3 Assimilators (Think and Watch)
- 2 Accommodators (Feel and Do)

With the majority of participants falling into the category of divergers, this allows facilitators to focus a large portion of the teaching on demonstrations. Divergers and Assimilators both succeed with watching as a learning method, which serves the purposes of this teach-a-class well. Convergers and

Accommodators who prefer to learn by doing over watching will be able to follow along with the demonstration for a more hands-on experience.

Challenges

This teach-a-class faces a number of potential challenges. As 85% of respondents to the pre-teach-a-class poll said they had never used OBS Studio, or considered themselves beginners, the facilitators must be prepared to spend a significant amount of time helping participants with basic functions of the program. The remaining 15% of the respondents self-identified as intermediate users of OBS Studio. The teach-a-class faces the challenge of ensuring that the lessons presented are still engaging for these participants.

There is also the ever-present challenge of unforeseen technical issues. Participants may have issues installing or operating OBS Studios on their laptops or accessing supplemental material on Brightspace. It is possible that there could be issues with the classroom projector. In that case, the presentation will have to be delivered completely orally without the aid of slides.

Learning Objectives

The learning objectives of this teach-a-class are divided into application-level learning objectives and comprehension-level learning objectives. This section will detail the two levels of learning objectives and the conditions, tasks, and standards associated with each learning objective.

Application-Level Objectives

Table 3 outlines the application-level learning objectives that will be taught through the participants using the basic functions of OBS Studio as they relate to screencasting.

Table 3: Application-level learning objectives

Learning Objective	Condition	Task	Standard
Use window capture to record a specific display window.	Using the Scenes and Sources panels in OBS Studio.	Add a new scene and window capture source, and configure on-screen display.	Within 5 minutes.
Add on-screen text and images to a screencast.	Using the Sources panel and Program Screen.	Add new text and image source and configure on-screen display.	Within 5 minutes.
Record picture-in-picture by capturing a display window and webcam feed.	Using the Sources panel and Program screen.	Add new video capture device source, and configure on-screen display.	Within 5 minutes.

Comprehension-Level Objectives

Table 4 outlines the comprehension-level learning objective that will be taught through the presentation delivered by the facilitators.

Table 4: Comprehension-level learning objectives

Learning Objective	Condition	Task	Standard
Understand the value of screencasting for the technical communicator to communicate task-oriented information in a video format.	Using OBS Studio.	Understand the basics of screencasting with OBS.	Retaining the information.
Understand the value of on-screen text and images for the technical communicator to display branding or call out information in a video format.	Using OBS Studio.	Understand how to add on-screen text and images.	Retaining the information.
Understand the value of picture-in-picture for the technical communicator to show themselves on screen and improve connection with their audience.	Using OBS Studio.	Understand how to record picture-in-picture video.	Retaining the information.

Evaluating Learning Objectives

This section will explain how the learning objective of this teach-a-class will be evaluated at the application and comprehension levels.

Evaluating Application-Level Objectives

The application-level learning objectives of this teach-a-class will be evaluated through the in-class exercises to be completed by the participants. Each of these in-class activities will correspond to one of the application-based learning objectives. Through successful completion of the in-class activities, the participants will demonstrate satisfactory understanding of the related application-level learning objectives.

Evaluating Comprehension-Level Objectives

The comprehension-level learning objectives of this teach-a-class will be evaluated through the post-teach-a-class survey. As part of this survey, participants will be asked to anonymously evaluate if the teach-a-class demonstrated the topics' value to the technical communicator. They will also be asked to evaluate how confident they felt completing the in-class exercises. These learning objectives could be evaluated through a quiz or the like, but it is the opinion of the facilitators that an honest self-assessment of the participants' feelings about the value of the topics and their level of confidence in performing those tasks is the best reflection on how well the participants have internalized the lessons.

Part 2: Workshop Design

The following section provides a detailed lesson plan and storyboard for our teach-a-class on creating a screencast in OBS Studio.

Detailed Lesson Plan

Table 5: Lesson Schedule

Time	Activity Type	Description	Teaching Notes	Material/Handouts
Pre-class	Orientation	Instruct learners to download OBS Studio and provide reference materials.	We will send information to Jim to post on Brightspace and will post on class Discord.	Includes: - download instructions - job-aid - sample image (Algonquin logo)
2 mins	Introduction	Welcome the class, introduce the topic, state our learning objective, provide relevance/scenario, and provide an outline of the TAC.	Instructor: Jade	PowerPoint Slide
2 mins	Setting Up	Prepare the class to set	Instructor: Alex	PowerPoint Slide

		up their laptop for OBS Studio.		
1 mins	OBS Studio Interface	Walk-through of the UI and focus on key panels for the simulation.	Instructor: Alex	PowerPoint Slide
2 mins	Topic 1 Intro	Introduce "using window capture" and explain its value as a technical communicator.	Instructor: Jade	PowerPoint Slide
3 mins	Topic 1 Demo	Instruct learners to open OBS Studio on their laptop and follow along.	Instructor: Jade Alex will help students who have questions or need help.	Computer
5 mins	Topic 1 Exercise	Introduce the individual exercise for the class to perform and monitor the class as they perform the exercise. Reveal the correct output once finished.	Jade will introduce the exercise and reveal the outcome at the end. Jade and Alex will help students who have questions or need help.	Computer
2 mins	Topic 2 Intro	Introduce "adding on-screen text or images" and explain its value as a technical communicator.	Instructor: Alex	PowerPoint Slide
4 mins	Topic 2 Demo	Instruct learners to open OBS Studio on their laptop and follow along.	Instructor: Alex Jade will help students who have questions or need help.	Computer
5 mins	Topic 2 Exercise	Introduce the individual exercise for the class to perform and monitor the class as they perform the exercise. Reveal the correct output once	Alex will introduce the exercise and reveal the outcome at the end. Jade and Alex will help students who have questions or need	Computer

		finished.	help.	
2 mins	Topic 3 Intro	Introduce "recording picture-in-picture" and explain its value as a technical communicator.	Instructor: Jade	PowerPoint Slide
4 mins	Topic 3 Demo	Instruct learners to open OBS Studio on their laptop and follow along.	Instructor: Jade Alex will help students who have questions or need help.	Computer
7 mins	Topic 3 Exercise	Introduce the individual exercise for the class to perform and monitor the class as they perform the exercise. Reveal the correct output once finished.	Jade will introduce the exercise and reveal the outcome at the end. Jade and Alex will help students who have questions or need help.	Computer
4 mins	Lesson Summary	Review the learning objectives, reiterate the value of screencasting, provide additional resources, and answer questions.	Instructor: Alex	PowerPoint Slide
2 mins	Feedback Survey	Provide a link to the survey on the slideshow and allow the class to complete it.	Instructor: Alex	Survey Link via PowerPoint Slide

Storyboard

Creating a Screencast in OBS Studio

Jade Guinoiseau and Alex Cuvelier

Instructor: Alex/Jade
Timeframe: 10s
Notes: Welcome class and introduce topic

Learning Objective

•**Purpose:** You will gain a basic understanding of screencasting using OBS Studio

•**Relevance:** Screencasts offer a way to teach an audience how to perform a task through a video and audio format, enabling technical communicators a way to better connect and engage with their audience

•By the end of this teach-a-class (TAC), you will be able to:
- Add window capture as a source
- Configure your capture area
- Add on-screen text and images
- Record picture-in-picture

Instructor: Jade
Timeframe: 1 min
Notes: Introduce purpose, relevance, and learning goals

Outline

•Set-up and walkthrough of OBS Studio
•Topic 1: Using window capture as a source
•Topic 2: Adding on-screen text and images
•Topic 3: Recording picture-in-picture
•Skills summary
•Feedback

Instructor: Jade
Timeframe: 45s
Notes: Discuss the schedule of the TAC

Setting Up OBS Studio

Let's get ready for today's TAC

Instructor: Alex
Timeframe: 5s
Notes: Introduce the set-up

Setting Up

• Open OBS Studio on your computer
• Have quick access to our job-aid and supplemental materials
• Download the sample image and save it to your computer

Instructor: Alex
Timeframe: 1.5 min
Notes: Give students the time to access the supplemental materials and open OBS on their laptop

Navigating OBS Studio
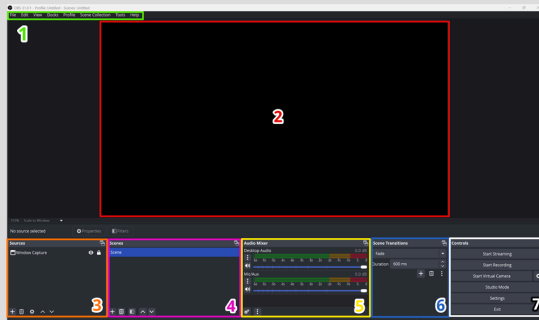
1) Menu bar
2) Program screen
3) Sources panel
4) Scenes panel
5) Audio Mixer panel
6) Scene Transitions panel
7) Controls panel

Instructor: Alex
Timeframe: 30s
Notes: Introduce basic navigation and focus on key panels

Topic 1: Using window capture as a source

Value: Focus on relevant content with fewer distractions

Topic 1: To add new scenes

1. In the **Scenes** panel, select**+** to add a new scene.
2. In the **Add Scene** dialog box, enter "window capture demo" as the name.
3. Select **OK**.

Add a new scene

Name the new scene
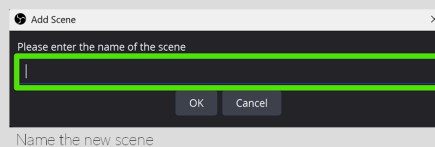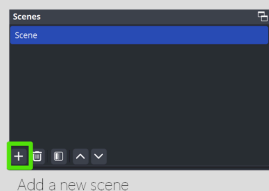
Topic 1: To add new sources

1. In the **Sources** panel, select**+** to add a new source.
2. Select **Window Capture** from the list.
3. In the **Create/Select Source** dialog box, enter "window capture" as the name.
4. Select **OK**.

Add a new source

Select Window Capture

Name the source
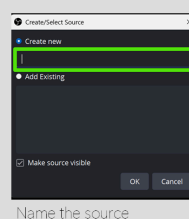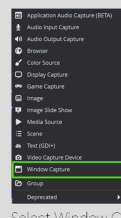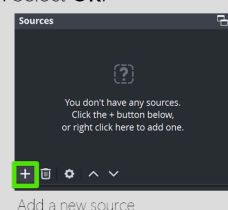
Topic 1: To select specific windows

1. In the **Properties** dialog box, select the application window you want to capture in the **Window** dropdown menu.

2. Select **OK**.
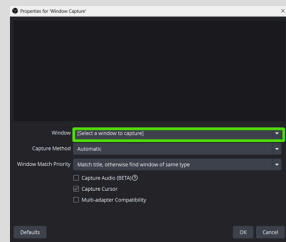
Select the application window

Topic 1: To adjust capture areas

1. Resize the capture area by clicking and dragging the handles around the red border.

2. Crop the capture area by holding **Alt** (or **Option** in Mac) and dragging the edges.
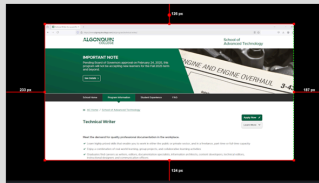
Click and drag the handles to resize
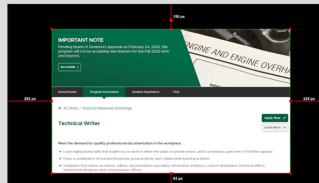
Hold Alt or Option while dragging the edges to crop

Topic 1: Demo

Let's take a look!

Topic 1: Exercise

1. Go to https://www.algonquincollege.com/future-students/programs/
2. Use window capture to capture the webpage
3. Name the capture "window capture"
4. Adjust the capture area to only include webpage and remove unnecessary UI elements

Instructor: Jade
Timeframe: 5 min
Notes: Jade will introduce the exercise. Alex/Jade will help students

Topic 1: Correct Result
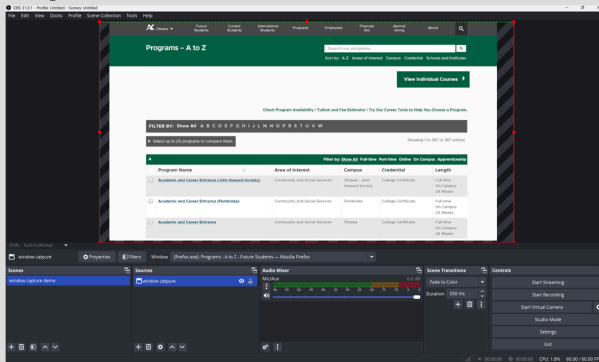
Instructor: Jade
Timeframe: 10s
Notes: Show correct result of exercise

Topic 2: Adding on-screen text and images

Value: Reinforce key points, guide the audience, and maintain consistent branding

Instructor: Alex
Timeframe: 30s
Notes: Introduce topic and explain value/relevance

Topic 2a: To create text overlays

1. In the **Sources** panel, select **+** to add a new source.

2. Select **Text (GDI+)** from the list.

3. In the **Create/Select Source** dialog box, enter "sample text" as the name.

4. Select **OK**.
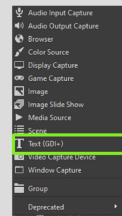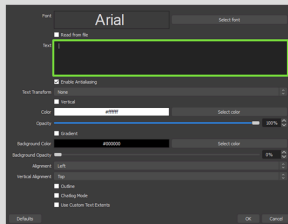

Select Text (GDI+)   Name the source
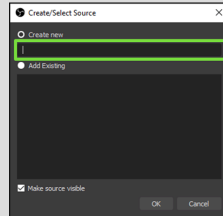
Topic 2a: To create text overlays

5. In the **Properties** dialog box, enter "sample text" in the text box.
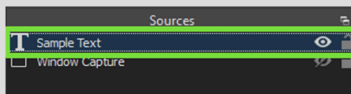
6. Select **OK**.
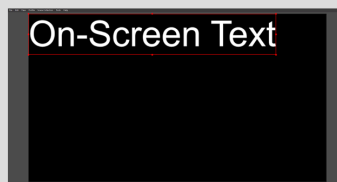

Enter your text in the text box

Topic 2a: To position or resize the text

1. In the **Sources** panel, select "sample text."

2. Drag the text to the program screen to where you want it positioned.

3. Resize the text by clicking and dragging the handles around the red border.

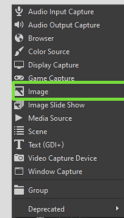Select the text source   Click and drag the handles to resize the text
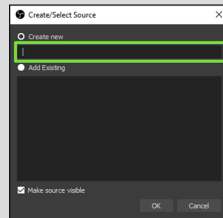
Topic 2b: To create image overlays

1. In the **Sources** panel, select **+** to add a new source.

2. Select **Image** from the list.

3. In the **Create/Select Source** dialog box, enter "sample image" as the name.

4. Select **OK**.
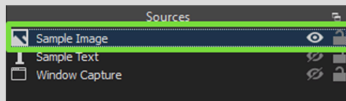

Select Image   Name the source
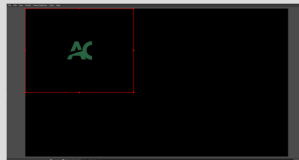
Topic 2b: To configure images

1. In the **Sources** panel, select "sample image."

2. Drag the image to the program screen to where you want it positioned.

3. Resize the image by clicking and dragging the handles around the red border.

Select the image source   Click and drag the handles to resize the image

Topic 2: Demo

Let's take a look!
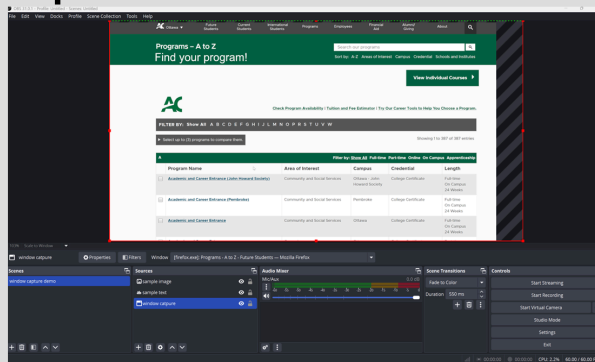
Topic 2: Exercise

1. Using the window capture source from Exercise 1, add the following text:
   "Find your program!"
2. Position and resize the text to fit under "Programs – A to Z"
3. Add the AC logo as an image
4. Position and resize the image in the white space above the filter bar

Instructor: Alex
Timeframe: 5 min
Notes: Alex will introduce the exercise. Alex/Jade will help students

Topic 2: Correct Result

Instructor: Alex
Timeframe: 10s
Notes: Show correct result of exercise

Topic 3: Recording picture-in-picture (PiP)

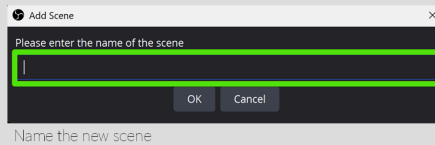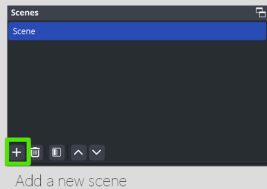**Value:** Improve audience engagement and add a sense of personalized instruction

Instructor: Jade
Timeframe: 30s
Notes: Introduce topic and explain value/relevance

Topic 3: To create new scenes

1. In the **Scenes** panel, select**+** to add a new scene.

2. In the **Add Scene** dialog box, enter "PiP demo" as the name.

3. Select **OK**.

Add a new scene   Name the new scene

Topic 3: To add main video sources

1. In the **Sources** panel, add the main source (background) by creating a new source or copying a previous source.

2. Adjust and resize the source to fit the program screen.

Topic 3: To add secondary video sources

1. In the **Sources** panel, select **+** to add a new source.

2. Select **Video Capture Device** to add your webcam.

3. In the **Create/Select Source** dialog box, enter "webcam" as the name.
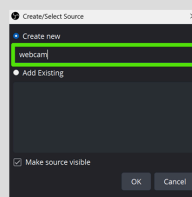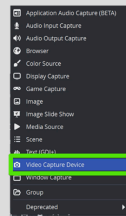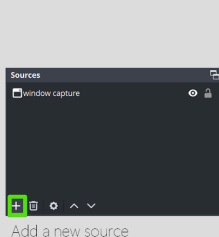
Add a new source   Select Video Capture Device   Name the source

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Topic 3: To add secondary video sources

4. In the **Properties** dialog box, select your camera from the **Device** dropdown menu.

5. Select **OK**.
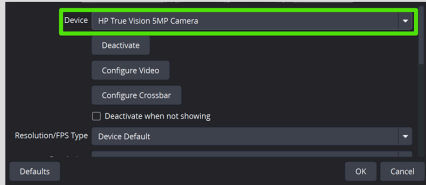
Select your camera

Topic 3: To configure PiP layouts

1. Resize the webcam source by clicking and dragging the handles around the red border in the program screen.

2. Drag the webcam source to where you want it positioned.

♀ **Tip!** Make sure you select the source you want to manipulate on the program screen. It will be outlined in red to show your selection.

Topic 3: Demo

Let's take a look!

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Topic 3: Exercise

1. Create a new scene called "PiP demo"
2. Copy (Ctrl+C) the sources from the previous scene and paste (Ctrl-V) them in the **Sources** panel for PiP demo. The main source will be the window capture.
3. Add your webcam as a secondary video source
4. Reposition the webcam source to the bottom left
5. Resize the webcam source to fit within the white space on the left margin

Instructor: Jade
Timeframe: 7 min
Notes: Jade will introduce the exercise. Alex/Jade will help students

Topic 3: Correct Result
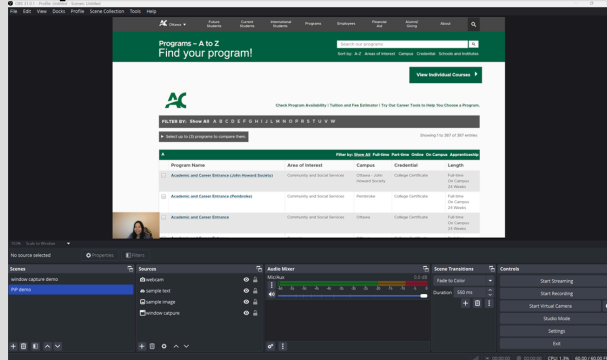
Instructor: Jade
Timeframe: 10s
Notes: Show correct result of exercise

Conclusion

Skills Summary and Feedback

Instructor: Alex
Timeframe: 5s
Notes: Introduce the conclusion

Skills Summary

•In today's TAC, you have learned:

Topic	Skills	Value
Topic 1: Using window capture as a source	• Adding new scenes • Adding new sources • Selecting specific windows • Adjusting capture areas	• Focus on relevant content with fewer distractions
Topic 2: Adding on-screen text and images	• Creating text overlays • Positioning or resizing the text • Creating image overlays • Configuring images	• Reinforce key points • Guide the audience • Maintain consistent branding
Topic 3: Recording picture-in-picture	• Adding main video sources (background) • Adding secondary video sources (overlay) • Configuring picture-in-picture layouts	• Improve audience engagement • Add a sense of personalized instruction

Instructor: Alex
Timeframe: 4 min
Notes: Discuss skills learned through this TAC and answer questions

Feedback

Please scan the QR code to access our survey.

Thank you for joining us on our TAC!

Instructor: Alex
Timeframe: 2 min
Notes: Provide students the time to complete survey

Part 3: Develop and Implement Your Design

Table 6 outlines how the teach-a-class will be implemented.

Table 6: Teach-a-class implementation

Element	Description
Teach-a-Class Team	Jade Guinoiseau & Alex Cuvelier
Topic Description	Participants will learn to create screencasts in OBS Studio, a free recording and live streaming software. This teach-a-class will cover basic elements of OBS Studio and explain why these elements are useful to technical communicators as they present information in a video format.
Learning Objectives	Application-level learning objectives:

	● Use window capture to record a specific display window. ● Add on-screen text and images to a screencast. ● Record picture-in-picture by capturing a display window and webcam feed. Comprehension-level learning objectives: ● Understand the value of screencasting for the technical communicator to communicate task-oriented information in a video format. ● Understand the value of on-screen text and images for the technical communicator to display branding or call out information in a video format. ● Understand the value of picture-in-picture for the technical communicator to show themselves on screen and improve connection with their audience.
Time/duration of event:	45 minutes
Notes on Participants	The participants will all be students in the Technical Writer program at Algonquin College. All of Kolb's learning styles are represented in the class with a bias towards Divergers. The exact breakdown is as follows: ● 7 Divergers (Feel and watch) ● 4 Convergers (Think and Do) ● 3 Assimilators (Think and Watch) ● 2 Accommodators (Feel and Do)
Logistics	The facilitators will require an HDMI connection to the classroom projector to display the presentation and live demonstrations.
Facilitation Assignments	The facilitators will alternate delivering the presentation and assisting participants between topics. The full lesson schedule and assigned roles can be found in Part 2: Workshop Design.
Facilitation Methods	The facilitators will introduce the teach-a-class to the participants and explain the learning objectives, provide an outline of the presentation, and how to set up OBS Studio. Then each topic will be presented following the pattern below: ● Facilitators explain the topic ● Facilitators demonstrate the process ● Participants complete the process themselves ● Facilitators confirm the correct results ● Facilitators introduce the next topic At the end of the teach-a-class, there will be a short evaluation survey to be completed by the participants.

Process	Facilitator-led presentations and demonstrations followed by individual participant exercises.
Techniques	- Presentations to introduce new concepts and explain their relevance to technical communicators - Demonstrations of new concepts - Exercises to reinforce concepts taught through presentations and demonstrations
Tools and Materials	- OBS Studio - PowerPoint slides - Projector - Image file on BrightSpace - Job aid handout
Activities	A demonstration and individual exercise for each of the three topics.
Challenges	- Participants may have issues installing OBS Studio - Participants may have issues accessing supplemental material on Brightspace - Possible technical issues with the classroom projector In the case of any of the above issues, the teach-a-class can be adapted to an oral presentation with participants following along under the facilitators' guidance.

Part 4: Design Evaluation

At the end of the teach-a-class, the participants will be asked to fill out a short anonymous survey delivered through Google Forms. The survey will ask the participants to evaluate how the material was presented in the teach-a-class and assess their understanding of the material as compared to before attending the presentation. The survey can be viewed below.

OBS Studio

"Creating a Screencast in OBS Studio" Feedback Form

This form will be submitted anonymously, so please answer all questions honestly as your feedback is invaluable to the factitators of this teach-a-class.

Please indicate how much you agree with the following statements.

I found the teach-a-class to be tailored to my level of familiarity with OBS Studio.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly agree

I found the pacing of the teach-a-class fit my needs.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly agree

I never felt lost or confused about the material during the teach-a-class.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly agree

I feel that my knowledge of OBS Studio has increased.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly agree

I feel confident in using OBS Studio for screencasting.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly Agree

I can see the value in screencasting for the technical communicator.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly Agree

I feel confident adding on-screen text and images in OBS Studio.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly Agree

I can see the value in adding on-screen text and images to screencasts for the technical communicator.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly agree

I feel confident using picture-in-picture in OBS Studio.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly Agree

I can see the value in using picture-in-picture during screencasting for the technical communicator.

○ Strongly disagree

○ Disagree

○ Agree

○ Strongly agree

Submit   Clear form