

Creating a Screencast with OBS Studio

Including Window Capture and Text and Image Overlays

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Introduction

Welcome! This tutorial will teach you how to screencast using OBS Studio.

Purpose

The purpose of this tutorial is to provide a basic introduction to screencasting in OBS Studio. This tutorial is designed for beginners who have little experience with screencasting and tools like OBS Studio.

Relevance

Technical communicators are responsible for developing user-friendly content. Screencasts offer a way to teach an audience how to perform a task through a video and audio format. Having basic knowledge of screencasting using a free and open-source tool like OBS Studio enables technical communicators to better connect and engage with their audience.

Prerequisites

In order to complete this tutorial, you will need:

- An internet connection
- OBS Studio installed
- A computer and depending on your operating system:
 - Windows
 - DirectX 10.1 compatible GPU
 - Windows 10, or Windows 11
 - macOS
 - Intel or Apple Silicon CPU
 - OpenGL 3.3-compatible GPU
 - macOS 11 ("Big Sur") or later
 - Linux/Unix
 - OpenGL 3.3-compatible GPU
 - X window system or Wayland

Organization

The tutorial begins with an introduction to OBS Studio and its interface. Once you are familiar with navigating OBS Studio, you will complete the following two lessons:

1. Using window capture
2. Adding on-screen text or images

It is recommended to start with Lesson 1 before moving on to Lesson 2. Each lesson contains a short activity to test your knowledge or apply your new skill.

The tutorial ends with a short summary of the skills you have learned, and an appendix provides an answer key and additional resources at the end.

Icon Legend

The following section defines key icons that will be displayed throughout the tutorial.



A **Note** provides additional information to improve your understanding.



A **Tip** shares recommended shortcuts that may help you.



A **Caution** alerts you to actions that may cause a loss of data or progress.



A **Ribbon** congratulates you of the successful completion of a lesson.

Overview of OBS Studio

This section provides a description of OBS Studio and an overview of the user interface.

What is OBS Studio?

Open Broadcaster Software (OBS) Studio is a free and open-source software designed for video recording and live streaming. It provides real-time source and device capture, scene composition, recording, and broadcasting. For the purpose of this tutorial, you will be using OBS Studio to create screencasts.

OBS Studio's User Interface

Figure 1 shows the user interface of OBS Studio and is made up of the following elements:

1. The **menu bar** is located at the top of the screen. There are eight menu options with different drop-down menus to access key functions. For example, **View** allows you to adjust the interface layout.
2. The **Program** screen is the area where the screencast you are recording will be displayed.
3. The **Sources** panel displays all input sources, such as display capture, window capture, video capture device, and media source.
4. The **Scenes** panel displays a list of all created scenes, which are collections of video, audio, and image sources.
5. The **Audio Mixer** panel manages all audio inputs and outputs, including volume sliders, mute buttons, and audio filters.
6. The **Scene Transitions** panel controls how the screen changes between scenes during a live stream or recording.
7. The **Controls** panel provides quick access to key functions, including start streaming, start recording, studio mode, and settings.

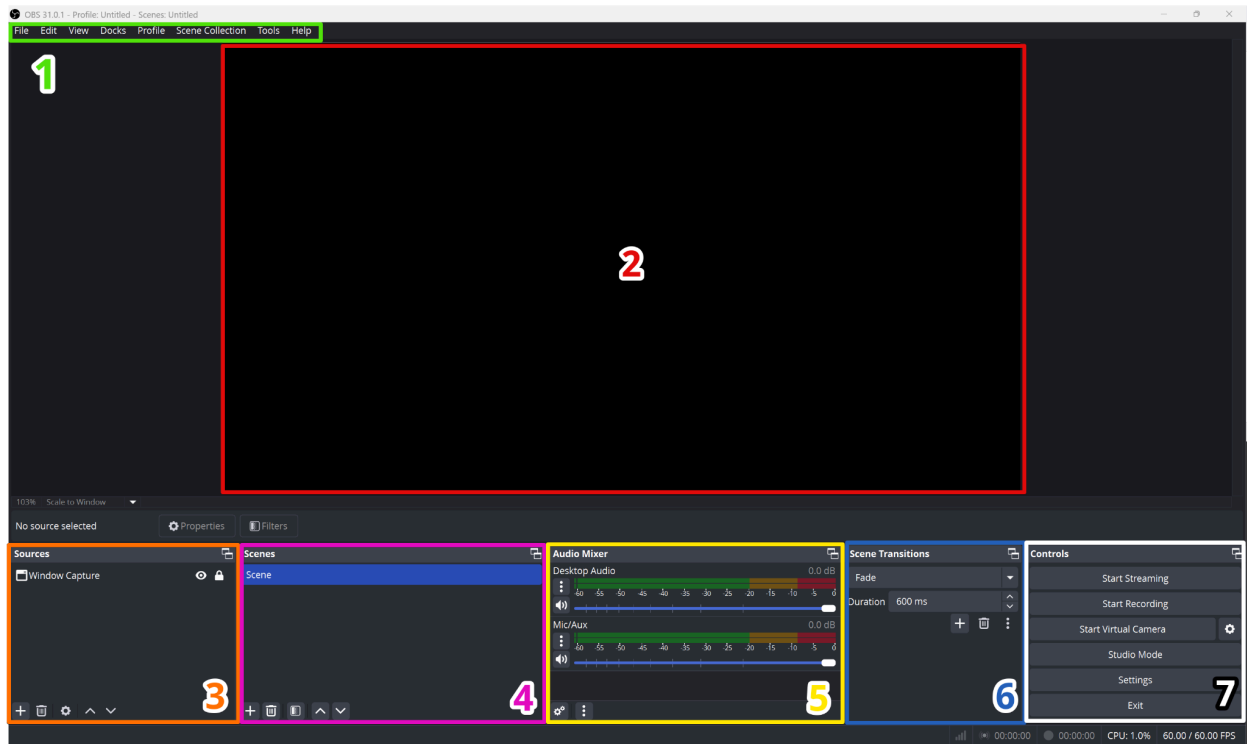


Figure 1. OBS Studio Interface

Lesson 1: Using Window Capture

In this lesson, you will learn how to add a new source input by selecting window capture sources and configuring the display regions. The value of using window capture allows the audience to focus on the relevant content with fewer distractions.

The goals of this lesson are to learn:

- How to add a new source
- How to select a specific window
- How to resize and crop the source
- How to test your scene

Creating a New Source for Window Capture

This topic will show you how to add a window capture as a new source in OBS Studio. A source is an element that provides visual or audio input in the scene. A common source is window capture, which allows you to capture the display of a specific window on your computer. This source type allows you to focus on a single program without showing the entire screen.

To Add a New Source

1. Open OBS Studio on your computer.
2. In the **Scenes** panel, select **+** to add a new scene.

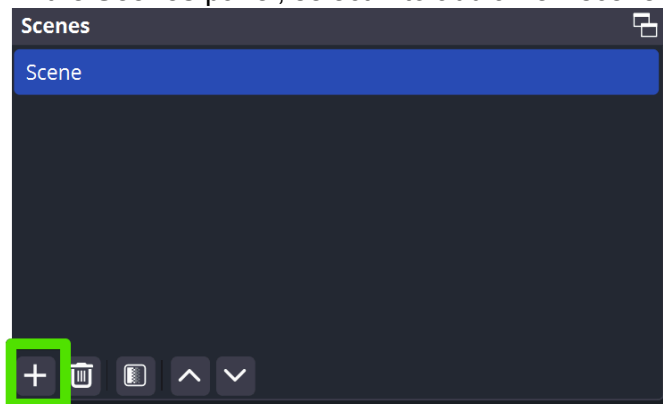


Figure 2: **Scenes** panel



If you do not create a new scene, the new source will overwrite the previous one.

3. In the **Add Scene** dialog box, enter *window capture* for the scene name.

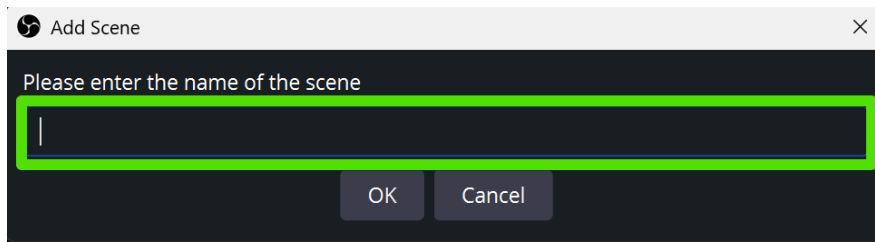


Figure 3: **Add Scene** dialog box

4. Select **OK** to save the scene name.
5. In the **Sources** panel, select **+** to add a new source.

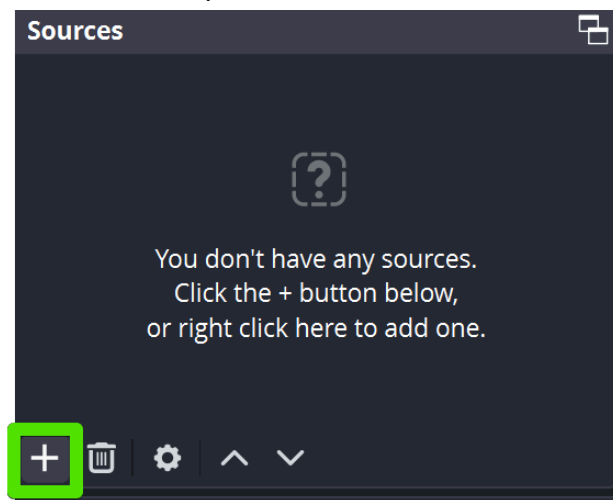


Figure 4: **Sources** panel

6. Select **Window Capture** from the sources list.

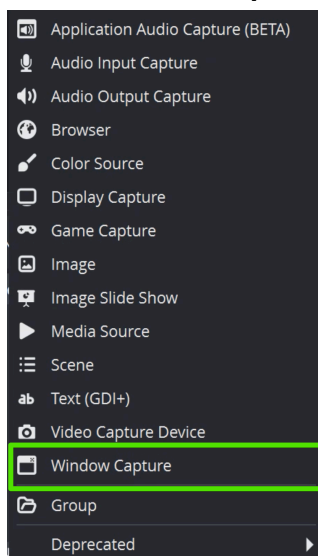


Figure 5: Sources list

7. In the **Create/Select Source** dialog box, enter *window capture* for the source name.

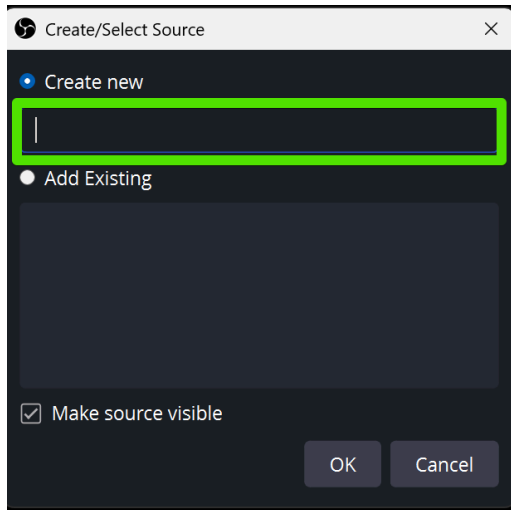


Figure 6: **Create/Select Source** dialog box

8. Select **OK** to save the source name.

To Select a Specific Window

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

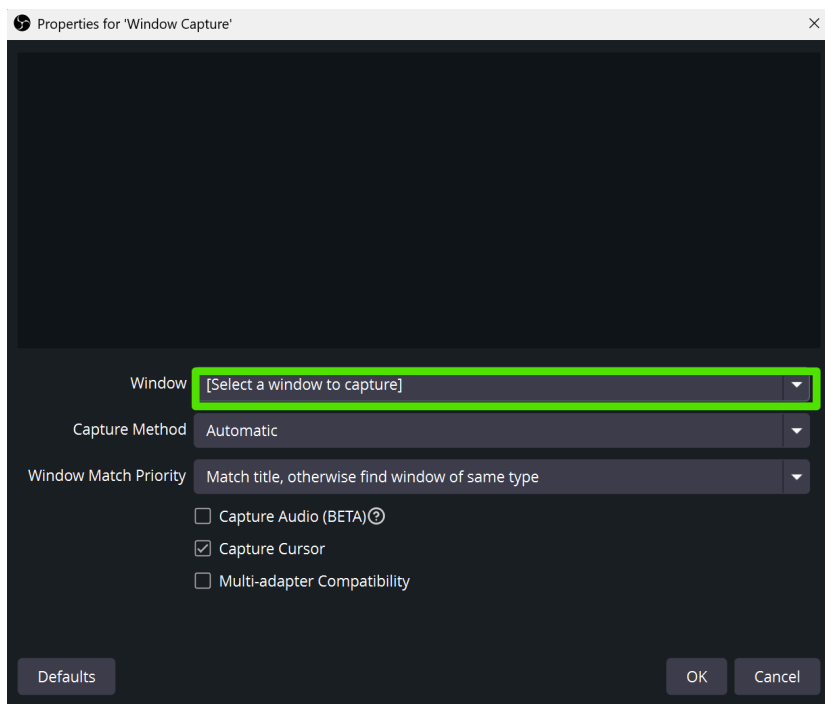


Figure 7: **Properties** dialog box



OBS only detects windows that are open. The window application must be running to select it.



Avoid using private windows because they may not displayed correctly due to security settings.

2. Select **OK** to confirm your choice.



You will see the selected window application displayed in the **Program** screen.

Configuring the Display Regions

This topic will show you how to resize, crop, and check your window capture. Resizing refers to the process of adjusting the dimensions of a source while maintaining its proportions. Resizing ensures the source fits within a scene layout. Cropping is the process of removing unwanted, outer areas of a source. It improves audience focus by highlighting key areas while removing unnecessary interface elements, like irrelevant toolbars or side menus.

To Adjust the Window Capture

1. Resize the window by clicking and dragging the red border around it.

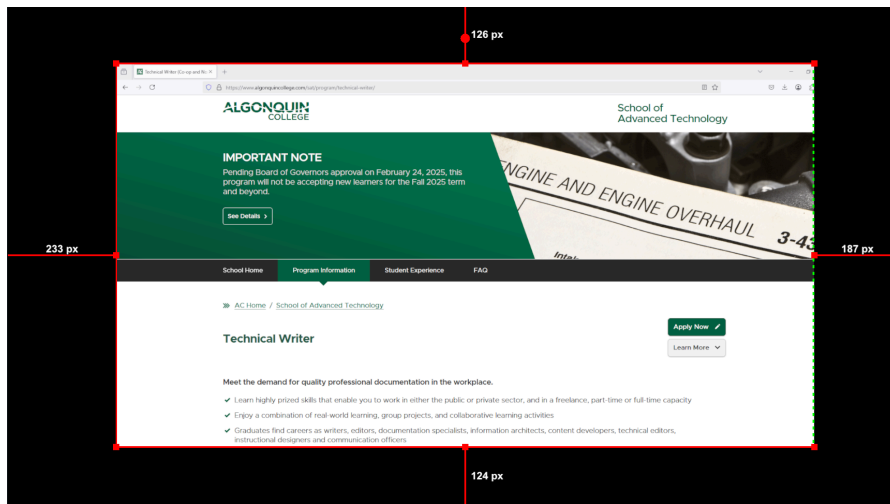


Figure 8: Red border around the window capture in the **Program** screen

2. While holding **Alt**, drag the edges to crop the window.

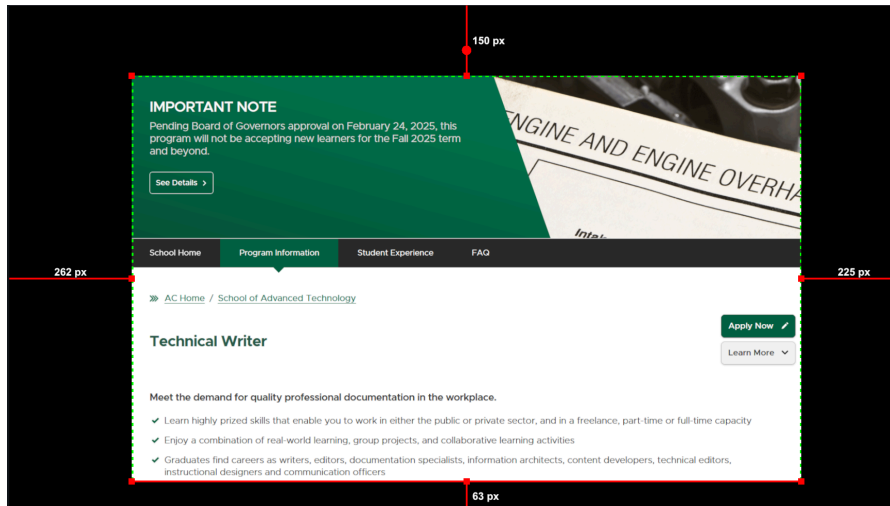


Figure 9: Cropped view of the window capture in the **Program** screen

To Test the Window Capture

1. In the **Controls** panel, select **Start Recording** to test the capture.

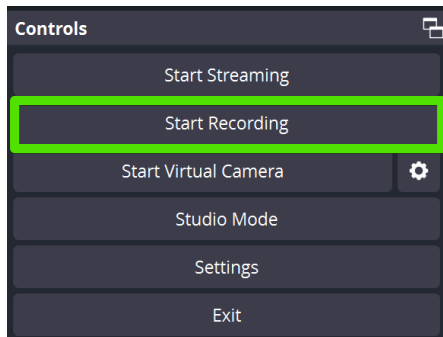


Figure 10: **Start Recording** button in the **Controls** panel

2. Verify the correct window is visible in the recording.
3. Select **Stop Recording** to end the test.

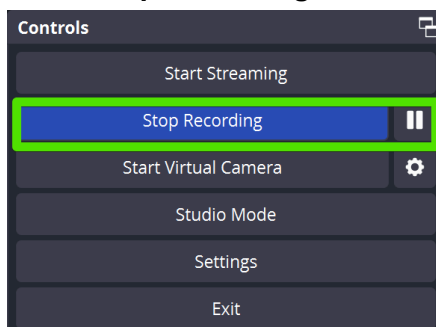


Figure 11: **Stop Recording** button in the **Controls** panel

Test Your Knowledge!

Here's a multiple-choice quiz to reinforce the learning objectives of this lesson on setting up window capture in OBS Studio. You can find answers in Part A in the Appendix.

Instruction: Choose the correct response to the following questions.

- 1) What is the primary purpose of the window capture source?
 - A) To capture the entire screen
 - B) To capture a specific application window
 - C) To capture audio from an application
 - D) To record from a webcam

- 2) How do you crop a window capture source?
 - A) By resizing with the Shift key
 - B) By right-clicking and selecting "Crop"
 - C) By holding down the Alt key and dragging the edges
 - D) By adjusting the window settings in the toolbar

- 3) What happens if you do not create a new scene before adding a new window capture?
 - A) OBS will crash
 - B) You will overwrite your previous source
 - C) A new scene will automatically be created
 - D) Nothing, it will work normally



Congratulations!

You have now completed Lesson 1!

Lesson 2: Adding On-Screen Text or Images

In this lesson, you will learn how to add text and image overlays to your screencasts by adding text sources and image sources through the **Sources** panel. The value of adding on-screen text and images include reinforcing key points, guiding the audience to the relevant content, and maintaining consistent branding.

The goals of this lesson are to learn:

- How to add on-screen text
- How to position and resize text
- How to add on-screen images
- How to position and resize images

Adding Text Sources

This topic will show you how to add text sources to your screencast. On-screen text can be used in your screencast to display information to the viewer or signal a transition to a new topic or family of information. This helps draw your viewer's attention to important information that they might miss otherwise on screen or to allow them to orient themselves during the course of a screencast.

To Create Text Overlays

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

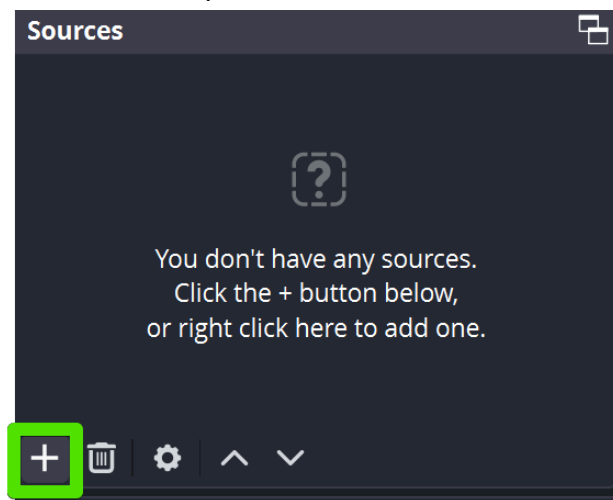


Figure 12: **Sources** panel

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

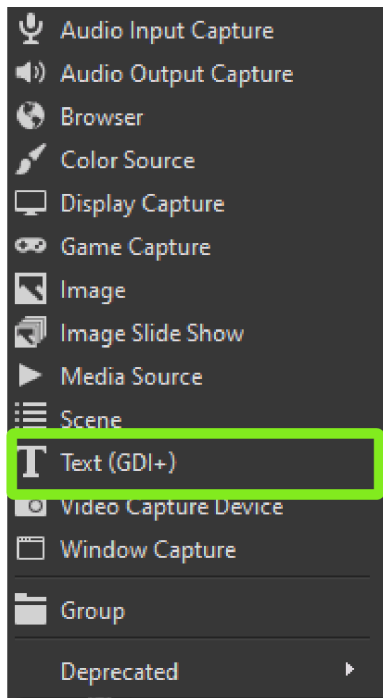


Figure 13: Sources list

3. In the **Create/Select Source** dialog box, enter *Sample Text* for the source name.

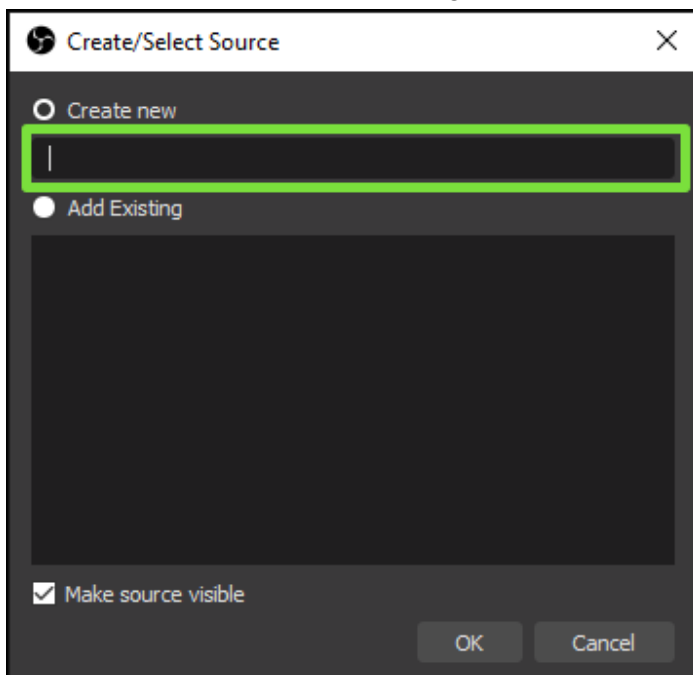


Figure 14: **Create/Select Source** dialog box

4. Select **OK** to save the source name.
5. In the text dialog box, enter *On-Screen Text*

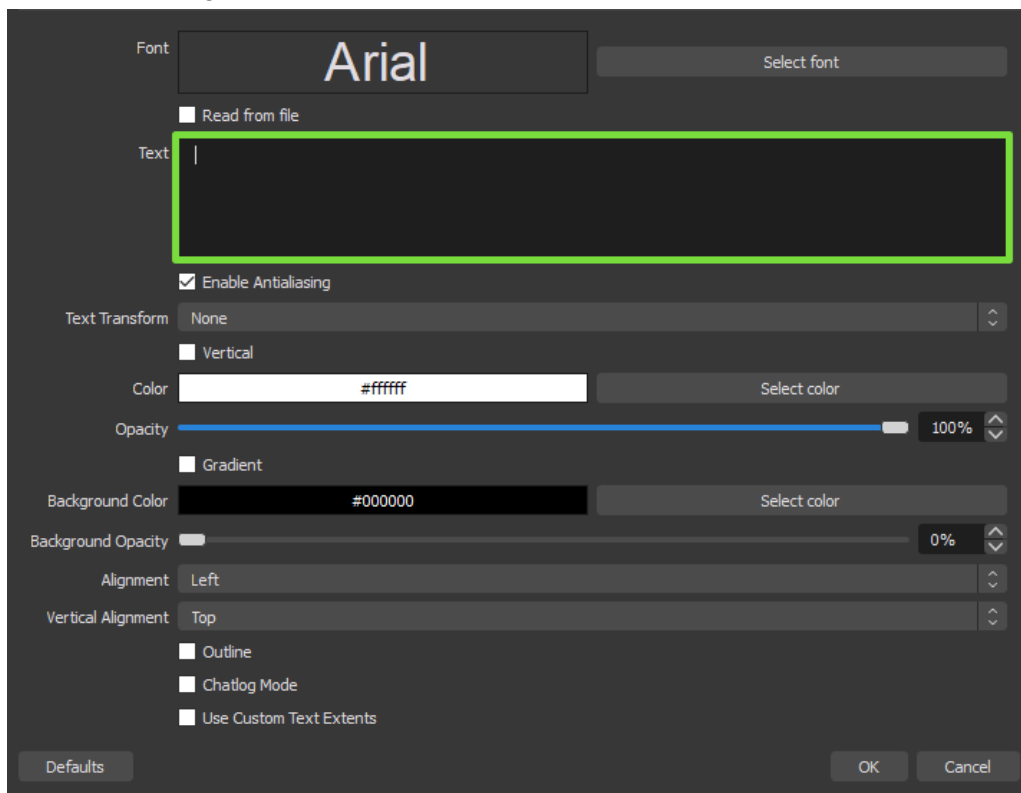




Figure 15: **Properties** dialog box of the Text (GDI+) source



You can adjust the font and colour of the text and add a background or outline to the text from this menu



You can return to edit the text source by selecting the text source in the sources panel and then selecting the properties button with the cog icon.

6. Select **OK** to create the text source.

To Position or Resize the Text

1. Select the text source in the **Sources** panel.

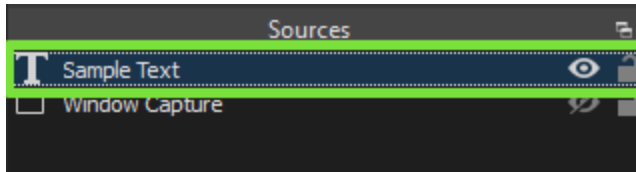
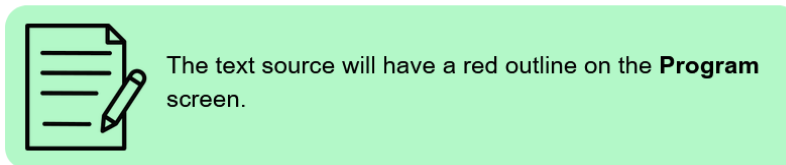


Figure 16: Text source in the **Sources** panel



2. Drag the text source in the **Program** panel to where you want it positioned on the screen.

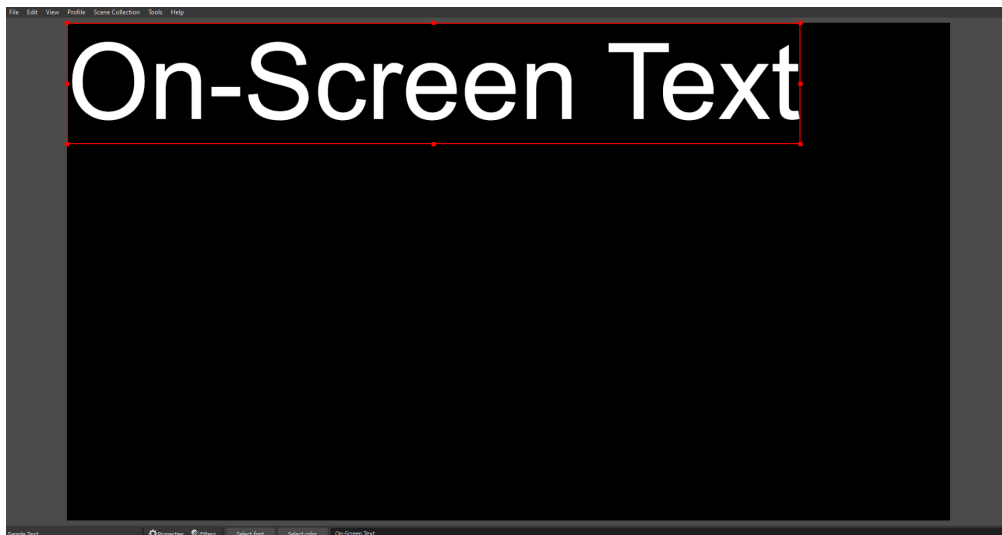
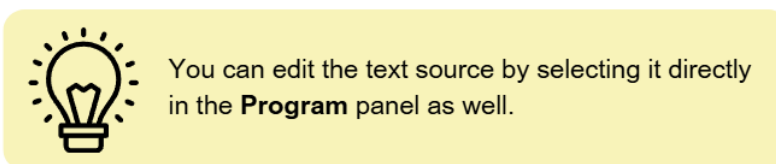


Figure 17: Red border around the Text source on the **Program** panel



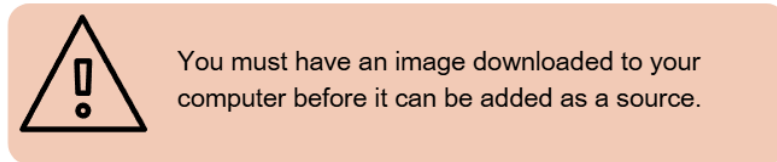
3. Resize the text by clicking and dragging the red border around it.

Adding Image Sources

This topic will show you how to add images to your screencast in OBS. Adding images to your screencast allows you to provide examples to your viewers without interrupting your

demonstration, such as a close-up of an icon for reference. You can also use images to brand your content by adding a logo to the corner of a screencast.

To Create an Image Overlay



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

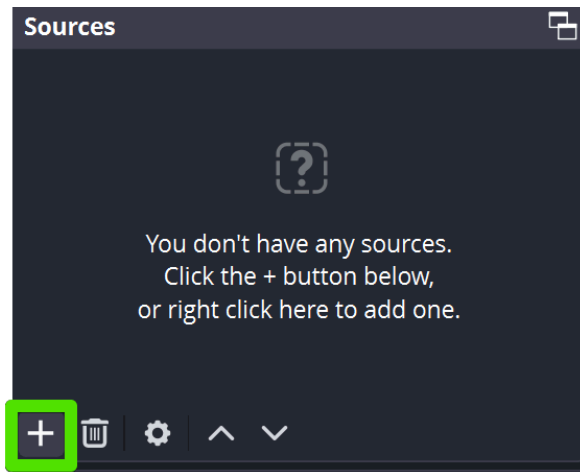


Figure 18: **Sources** panel

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

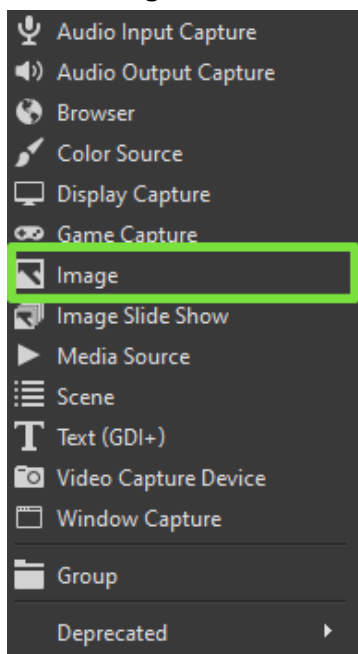


Figure 19: Sources list

3. In the **Create/Select Source** dialog box, enter *Sample Image* for the source name.

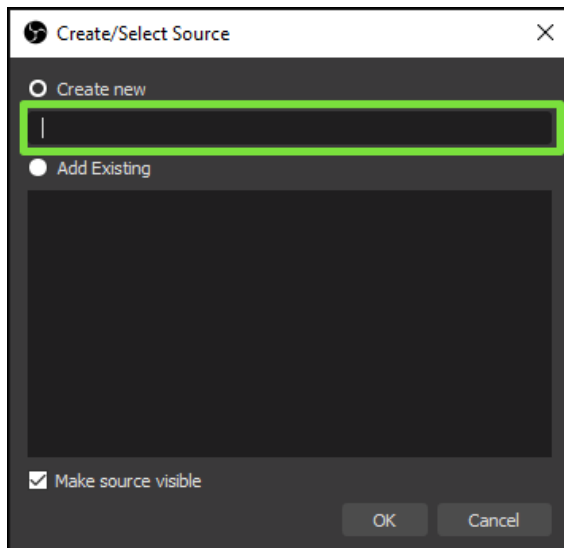


Figure 20: **Create/Select Source** dialog box

4. Select **OK** to save the source name.
5. Select **Browse** to open the file explorer.



Figure 21: **Properties** dialog box of the Image source

6. Navigate to the image file you want to upload and select the image.
7. Select **Open** to upload the image.

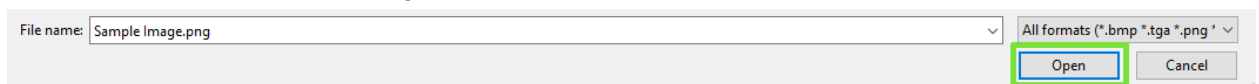


Figure 22: Image file upload dialog box

8. Select **OK** to create the image source.

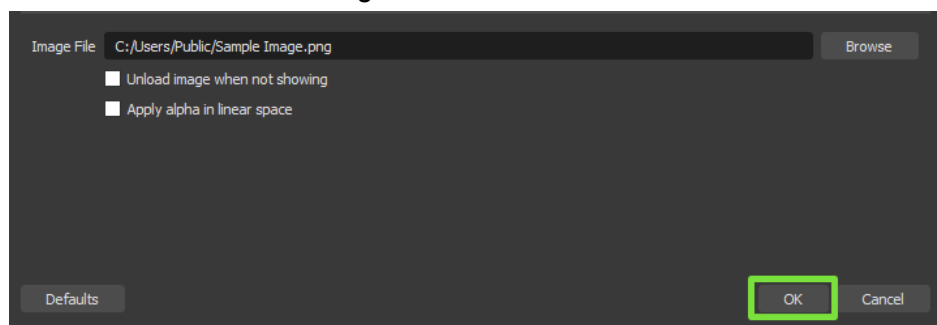


Figure 23: **Properties** dialog box of the Image source

To Position or Resize the Image

1. Select the image source in the **Sources** panel.

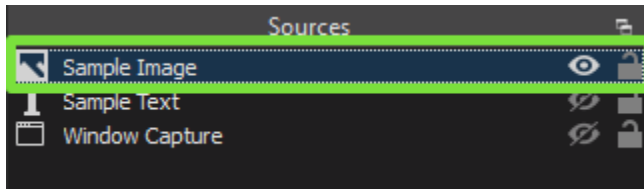


Figure 24: Sources list



The image source will have a red outline on the **Program** screen.

2. Drag the image source in the **Program** panel to where you want it positioned on the screen.

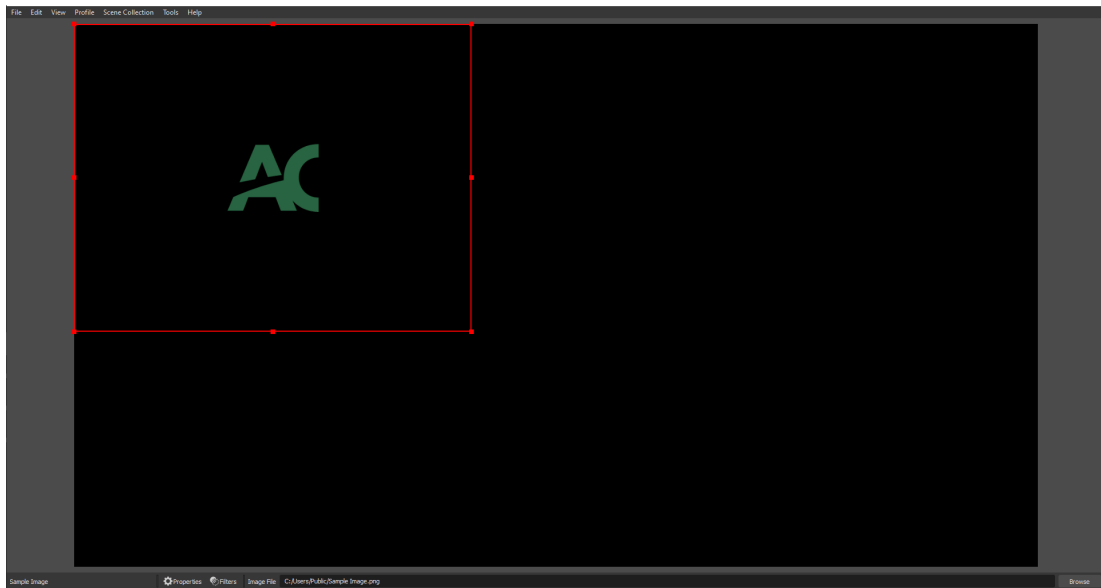


Figure 25: Red border around the Image source on the **Program** panel



You can edit the image source by selecting it directly in the **Program** panel as well.

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

Test Your Knowledge!

Here's a multiple-choice quiz to reinforce the learning objectives of this lesson on adding on-screen text and images in OBS Studio. You can find answers in Part B in the Appendix.

Instruction: Choose the correct response to the following questions.

- 1) What is the correct source to select when adding a text source?
 - A) Browser
 - B) Text (GDI+)
 - C) Text
 - D) Window Capture

- 2) What is the correct source to select when adding an image source?
 - A) Color Source
 - B) Display Capture
 - C) Browser
 - D) Image

- 3) Where must an image be located to upload it as an image source in OBS?
 - A) The internet
 - B) The OBS image library
 - C) Your computer
 - D) The clipboard



Congratulations!

You have successfully completed Lesson 2!

Summary

You have successfully completed the tutorial on how to use window capture and add on-screen text and images in OBS Studio.

You now know how to do the following in OBS:

- Capture a specific window for a screencast
- Configure the captured window
- Add and configure text overlays
- Add and configure image overlays

These skills will help you in your technical communications career to present technical information in a video format. The skills you have learned here are focused on prerecorded demonstrations, but they can be easily transferred to presenting live demonstrations remotely.

With the new knowledge and tools at your disposal, you are ready to start creating your own screencasts, which are wonderful portfolio pieces as employers look for the skills and abilities demonstrated in screencasting. Learners absorb information much more readily through video than text alone, so it is no wonder that these skills are in high demand.

Congratulations on completing the tutorial!

Appendix

The appendix contains answers to the Test Your Knowledge quizzes and additional resources.

Part A: Answer Key

Lesson 1:

1) What is the primary purpose of the window capture source?

B) To capture a specific application window

2) How do you crop a window capture source?

C) By holding down the Alt key and dragging the edges

3) What happens if you do not create a new scene before adding window capture?

B) You will overwrite your previous source

Part B: Answer Key

Lesson 2:

1) What is the correct source to select when adding a text source?

B) Text (GDI+)

2) What is the correct source to select when adding an image source?

D) Image

3) Where must an image be located to upload it as an image source in OBS?

C) Your computer

Part C: Additional Resources

For more information on how to use OBS Studio for screencasting and much more, visit the OBS Knowledge Base, which [can be found here](#), or at obsproject.com/kb/.