

# Taking effective screen captures

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MICHAEL A. STOWE

ENG 773: WRITING FOR THE COMPUTER INDUSTRY

## Determine the reason for the capture

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Use captures purposefully, not for decoration or to “break up text” arbitrarily.

The following tend to be good reasons for including captures:

- To show users an overview of a program window, dialog box, panel, or feature so they can work with it effectively (in conceptual overview topics and in tutorial documentation).
- To point out icon-based buttons from the interface (in all documentation types).
- To help users locate information in a complex screen or dialog box, especially to help avoid using word-based locators.
- To confirm that users have completed a task correctly, especially if achieving the result involves complex or complicated steps.

## Consider document constraints

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Users do not usually maximize Help windows.

- Help systems typically run windowed, side-by-side with the software users are working with.
- Users retain (and should retain) control over the sizing and presentation of windows.

Help windows offer a relatively small space for presenting images.

Users can access any number of computing devices to view the Help system.

There's no hard rule, but you can reasonably count on a maximum screen space of  $\approx 800$  pixels.

Images larger than 600–800 pixels may introduce horizontal scrolling.

## Optimize large captures

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1. Resize the interface elements.

- Avoid taking full-screen and window captures unless absolutely necessary.
- Size windows and dialog boxes down as much as possible before taking captures.

2. Consider whether you should show only part of the window or dialog box.

- Can you capture just a region of the screen without losing clarity?
- Can you crop out any part of the capture in an image editor without losing clarity?

3. Consider resizing the window or dialog box capture if you can still convey the idea clearly.

- Perform resize operations using an image editor instead of within RoboHelp.
- Consider sharpening the image after resizing.

4. Use thumbnail images (linked with a popup) if you *must* show a large image.

## Think about file size

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Every image increases the file size of the Help documentation.

If the Help system is a local installation, file size affects the amount of memory and hard disk space used for documentation.

If the Help system is accessed from a server, file size affects bandwidth and data caps.

## Provide a uniform experience

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Make sure the interface matches the user's system as much as possible and minimize distraction.

If taking full-screen captures:

- Consider using the default operating system wallpaper.
- Clear the desktop of any clutter, keeping the number of icons to a minimum.
- Unpin programs from the taskbar (Windows) or the dock (Mac).

If taking program window captures, return the interface to program defaults, unless you're showing something about changes being made.

If taking captures that will include the titlebar, turn off window transparency

## Save screen captures in the correct file format

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Save the capture in PNG (Portable Network Graphics) format.

- Use PNG-8 for images with few colors
- Use PNG-24 or PNG-32 for images that include transparencies or gradients.)

Avoid using JPEG and GIF formats.

- JPEG is meant for photos, and the resulting captures will contain artifacts that result in a smeary, unprofessional appearance.
- GIF can store a color palette of only 256 of the most common colors (aka 8-bit) in the image, not enough for today's modern operating systems.

Saving in the correct PNG format will result in an attractive capture AND will save file size, even over GIF and JPEG alternatives.

While working with images, especially those with artwork or callouts, consider saving the capture in the capture program's native format. (In Snagit, the native format is .snag.)

## Use an effective naming and organization strategy

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Avoid giving the capture a name such as image1.png or 001.png.

Use a naming system that helps you identify the content of the capture:

- Include the name of the button, dialog box, etc.
- Mention what the interface element is.
- Include additional descriptors if they help distinguish similar captures.
- Use underscores instead of spaces in the file names to keep them web-safe.

Consider organizing all images into a separate folder within the project to keep them together.

## Use the right tool for the job

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Snagit is an excellent choice for taking screen captures because of the features it offers.

- Object captures
- An editor that provides edge effects, highlighting options, and an assortment of crop tools

Help-authoring programs often come with screen capture tools, but they're usually not as easy to use or as full featured as more dedicated tools.

In a pinch, you can use the capture tools built into the operating system (e.g., Snipping Tool in Windows or Grab in macOS), but you'll still need access to an image editor.

Snagit is a \$30 purchase with an academic discount: <http://goo.gl/b6l3Tq>.