

# Welcome to Socialive!

## Producer's Guide to Setting up Self-Guided Recordings

As a producer, you may find yourself in situations where guests with busy schedules are asked to contribute content. In many cases, it's not just inefficient but impossible to get all guests together at the same time and place for the recording. Instead, you can ask each contributor to **record their content whenever and wherever is best for them** and automatically upload it to the Socialive Recordings Library. This guide introduces producers to self-guided recordings and how to use them to produce and distribute studio-quality video at scale.

By reviewing this guide, producers will be able to:

- Define and explain the benefits of a self-guided recording
- Explain the benefits of pre-recording content from an organizational perspective
- Use the self-guided recording workflow as part of a production
- Use best practices for guests creating different recording types

## Table of Contents

### [What is a self-guided recording?](#)

[Record Internally](#)

[Record in the Green Room](#)

[Upload from the iOS App](#)

### [What are the Benefits of Self-Guided Recordings?](#)

[Benefits to Guests](#)

[Benefits to Producers and the Organization](#)

[When to Use Self-Guided Recordings](#)

[When Not to Use Asynchronous Recording](#)

### [Setting Up the Self-Guided Recordings Workflow](#)

[Record Internally](#)

[Record in the Green Room](#)

[Producer Setup Steps](#)

[1. Create the Socialive Studio Session](#)

[2. Invite Guests Using Guest Links](#)

[Guests Contribution Steps](#)

[1. Guests Join the Green Room Session](#)

[2. Guests Upload Recordings to the Socialive Recordings Library](#)

[Upload from the iOS App](#)

[Best Practices for Guests](#)

[Best Practices for Mobile Recordings](#)

[Best Practices for Desktop Recordings](#)

### [Reviewing Guests' Content Contributions](#)

### [Producing a Recording](#)

[1. Create the Socialive Studio Session](#)

[2. Create the Run-of-Show](#)

[What is a Run-of-Show?](#)

[Adding Start and End Cards](#)

[Using Background Images and Videos and B-Roll](#)

[Using Audio, Video, and Graphic Overlays](#)

[Using Automated Name Tags](#)

[3. Reviewing and Distributing the Final Recording](#)

[Downloading the Recording](#)

[Sending Recordings to Integrated Applications](#)

[Setting Up the Integrations](#)

[Sending Recordings](#)

[Additional Resources](#)

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# What is a self-guided recording?

A self-guided recording is a recording created without a producer's involvement, where the output is only the guest's video recording. The types of self-guided recordings available to Socialive guests are:

- "Record Internally" on the Socialive mobile apps
- "Record" in the Socialive Green Room on desktop or mobile
- "Upload" via the Socialive iOS app

Let's go over the differences between these recording types.

## Record Internally

The "Record "Internally" functionality of the Socialive mobile app, available both on iOS and Android, allows guests to capture recordings directly from within the app, which are then automatically uploaded to the Socialive Recordings Library.

## Record in the Green Room

The "Record" functionality is available to guests who have joined the Green Room on a desktop or from Socialive mobile apps (both iOS and Android). In the Green Room, guests can click "Record" to start a high-definition recording of their audio and video feed.

Guests can create multiple recordings while in the Green Room and may stop recording at any time. Upon leaving the Green Room, all recordings will upload automatically to the Socialive Recordings Library.

## Upload from the iOS App

In situations where a guest has captured a video on their device that they wish to upload to Socialive, they can use the Socialive iOS app's feature to upload pre-recorded videos directly to the Socialive Recordings Library.

## What are the Benefits of Self-Guided Recordings?

### Benefits to Guests

1. Guests who do not have reliable cell signal or Wifi can record when convenient, then upload their recording when service is available.
2. Guests can record at their own pace, on their own devices, and on their own terms.
3. Guests do not need to be available at the time, date, and location of the live event.
4. Cuts down the number of live feeds, providing a better Green Room experience for guests who are live during the event.

### Benefits to Producers and the Organization

1. Producers do not need to be present while guests are recording, freeing their time.
2. The workflow encourages a wider range of participation by allowing organizations to hear from Subject Matter Experts (SMEs) in the field and others who may not normally get opportunities to participate.
3. Pre-recording content allows the producers or creative team to edit the footage to what is needed, giving them greater control over the timing and pace of the event.
4. All recorded content becomes an eternal library of content to be used as B-roll, reusable content, etc

## When to Use Self-Guided Recordings

Self-guided recordings are single-person recordings where the output is only one guest's audio and video feed. So this workflow is most appropriate for single speakers with direct messages, such as

- A CEO speaking about their vision for the future of the organization
- A financial advisor recording a quarterly update for their clients
- Employee and customer testimonials
- A remote-contributing guest with an unreliable signal or no access to Wifi

## When Not to Use Asynchronous Recording

While asynchronous recording can be a powerful workflow and saves time for many scenarios, there are some scenarios where it is not the right application, such as

- A guest requires direction or assistance
  - A guest is using slides
  - A guest is “reacting live” or addressing a video
  - Live panel discussions with multiple speakers or where audience feedback is encouraged or incorporated
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# Setting Up the Self-Guided Recordings Workflow

The output of a self-guided recording is a recording in the Socialive's Recordings Library. A guest's self-guided recording can be:

- Distributed on-demand or live streamed
- Clipped and repurposed in future videos
- Included as part of a larger recording together live guests

Let's examine at how producers can enable guests to provide their content using different self-guided recordings.

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## Record Internally

Using the mobile app to create self-guided recordings provides several advantages:

- Allows guests to use a device they already have from anywhere at any time
- Many mobile devices have cameras with higher resolution than most desktops and webcams
- Recordings are automatically uploaded upon completion
- No producer set up or involvement is required

Guests using the "Record internally" option in the Socialive mobile app can capture video in up to 1080p resolution. For instructions to capture an internal recording, provide guests with the following articles:

- [Capture Internal Recordings with the Socialive iOS App](#)
  - [Capture Internal Recordings with the Android App](#)
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## Record in the Green Room

The “Record” functionality is available to guests who have joined the Green Room on a desktop or from Socialive mobile apps (both iOS and Android).

The benefits of recording in the Green Room are:

- Guests can be invited using guest links; there is no need to log in using credentials or create guest accounts
- Besides the device recording, ISOs, or Isolated Feed Recordings, are automatically captured (in up to 1080p resolution), from the moment the guest enters the Green Room until they leave.

Because this method of recording uses the Socialive Green Room, producer setup is required. However, the producer does not need to be present when guests are recording in the Green Room.

## Producer Setup Steps

### 1. Create the Socialive Studio Session

Producers will need to set up a Socialive Studio session for guests to join the Green Room and record. The following support article will guide producers through this process:

- [Creating a New Broadcast](#)

### 2. Invite Guests Using Guest Links

Once producers create the Studio session, they'll need to invite guests to join the Green Room. Socialive recommends using Guest Links, which allow guests to bypass the login process and join the Green Room directly from their inbox.

The following support article will guide producers through the process:

- [Inviting Guests to a Broadcast](#)

We recommend that producers send guests each of their guest links along with the instructions on how to capture the self-guided recording and the best practices to follow.

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## Guests Contribution Steps

### 1. Guests Join the Green Room Session

Guests clicking the guest link will automatically log into Socialive and land in the Green Room lobby, where they can easily join the Green Room to record. There are a few differences in the resolution when joining on mobile vs. desktop:

- On iOS, guests in the Green Room can capture local recordings in up to 4K resolution ([supported devices only](#)).
- On Android, guests in the Green Room can capture local recordings in up to 1080p resolution.
- On desktop, guests in the Green Room can capture local recordings in up to 1080p resolution (depending on the webcam's resolution).

All platforms follow a similar process, but the step-by-step instructions can be found in the following support articles:

- [Capturing Local Recordings in the Desktop Green Room](#)
- [Capturing Local Recordings in the Mobile Green Room \(iOS\)](#)
- [Capturing Local Recordings in the Mobile Green Room \(Android\)](#)

We recommend that producers compile the instructions specific to the device the guest is going to use to capture the recording to send together with the guest link and the best practices to follow.

### 2. Guests Upload Recordings to the Socialive Recordings Library

On all platforms, guests must click or tap the “Leave” button to exit the Green Room to trigger the automatic uploads window. It is important that guests keep the browser window or mobile app open until the videos are completely uploaded. If guests close the Green Room by clicking the X, the recordings will stop automatically uploading. The recordings will stay in the Green Room session to upload when the browser window or app is opened again, unless:

- The guest clears their browser cache and data. The recordings will be deleted from their browser and will not be retrievable.

- The Studio session is closed by the producer.
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## Upload from the iOS App

The “Upload” functionality of the Socialive iOS app allows users to upload videos captured on their devices outside of Socialive and upload them to the Socialive Recordings Library. For example, an employee recorded a video of their team demonstrating a procedure in the field and wishes to upload it to the Socialive Recordings Library to be included as part of the training video. To achieve this, the employee can log into the Socialive app, select the video from their camera roll, add an identifiable name, and upload it to the Socialive Recordings Library.

For instructions on uploading pre-recorded content refer to the following support article:

- [Uploading Recordings From Your Camera Roll to the Recordings Library](#)

Socialive recommends complying with your organization's guidelines on data and device management when using this workflow.

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## Best Practices for Guests

Producers can prepare guests by providing them with a list of organizational requirements for their recorded content, in addition to the tips and tricks listed below.

## Best Practices for Mobile Recordings

Socialive recommends the following when creating a mobile recording:

- Ensure the device is fully charged before beginning.
- Ensure the device is in Do Not Disturb mode to avoid distractions and interruptions.
- Use a microphone or headphones for the best audio quality. *Currently, only the Socialive iOS app supports using microphones or headphones for recording ([see list of supported devices](#)).*
- Avoid covering the device camera lens with your finger when recording.
- Guests should project and enunciate clearly when speaking.

## Best Practices for Desktop Recordings

Socialive recommends the following when recording on a desktop:

- Close all resource-heavy applications and browser windows not currently in use.
  - Be off of the company VPN so the network is not restricted.
  - Place the device at eye level. Guests can place their laptops on top of a stack of books to raise the camera at eye level.
  - Guests should center themselves within the camera frame and ensure their head, shoulders, and the top of their torso are captured.
  - Guests should project and enunciate clearly when speaking.
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## Reviewing Guests' Content Contributions

Once guests have recorded their content and successfully uploaded it to the Socialive Recordings Library, it is time for producers to review the content and prepare it to use in the recording or live broadcast.

Producers need to clip a recording in order to send it to Socialive Studio for use in future recordings or live broadcasts. For instructions on how to clip and send content to Socialive Studio, refer to the support article below:

- [Clipping and Incorporating Recordings Into Future Broadcasts](#)

The clips you create and send to Socialive Studio will appear in the Media Sources panel, where you can drag and drop into scenes in your run of show.

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## Producing a Recording

This section outlines the process of producing a recording or live broadcast using the submitted self-guided recordings.

[1. Create the Socialive Studio Session](#)

[2. Create the Run-of-Show](#)

### [3. Recording](#)

## 1. Create the Socialive Studio Session

If you haven't created the Socialive Studio session, follow the steps in the support article below:

- [Creating a New Broadcast](#)
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## 2. Create the Run-of-Show

### What is a Run-of-Show?

A run-of-show is a scene-by-scene sequence of events created before a recording or live broadcast.

For step-by-step instructions to create the run-of-show in Socialive Studio, refer to the following support article:

- [Creating the Run-of-Show in Studio](#)

### Adding Start and End Cards

In Socialive, intros, and outros can be images or introduction videos played at the start and end of a recording or live broadcast. Intros and outros help establish a stronger brand identity with your audience, make videos look professional, maintain consistency with your videos, and serve as a starting and ending point for videos.

Socialive recommends the use of intros and outros in broadcasts to:

- Inform the audience about the broadcast's start and end time,, topic, or call to action
- Allow for a smooth transition into the content of the broadcast

For instructions on how to create and use start and end cards, refer to the following support article:

- [Use Start and End Cards](#)

## Using Background Images and Videos and B-Roll

You can use b-roll, background images or videos in your recordings or live broadcasts to diversify the flow and help keep viewers engaged until the end.

- To upload assets, refer to the support article [Uploading Media Assets to Studio](#).
- To use background images or videos, refer to the support article [Adding a Background Image or Video to a Scene](#).

## Using Audio, Video, and Graphic Overlays

In Socialive, you can add audio effects, images, or videos on top of live sources or pre-recorded content to make your recordings and live broadcasts more dynamic. You can add background music, sound effects, animated logos, countdowns, and more.

For instructions to upload and use overlays, refer to the following support article:

- [Using Audio, Video, and Graphic Overlays](#)

Keep in mind that video overlays with a transparent background need to be in the WebM format to use them in Socialive. For instructions to export or convert files to WebM, refer to the following support articles:

- [Overlays: Exporting/Converting Files to WebM](#)
- [Using Shutter Encoder to Convert Videos to WebM](#)

## Using Automated Name Tags

The name tags feature in Socialive Studio automatically generates a lower third displaying guests' names, titles, pronouns, locations, and any other information you want to show. You can apply name tags to live sources and pre-recorded content uploaded to the Media panel. For instructions on how to use name tags, follow the steps in the article below:

- [Displaying Guests' Names on Screen with Name Tags](#)

If your organization has specific guidelines on lower-thirds used in recordings or live broadcasts, you would need to create custom lower thirds. For this, you'll need the dimensions of the layout you'll use and where you'll need to display guests' names on the screen. You'll need to consider the [output resolution of your recording](#) as well. For example, if your output resolution is 1080p, you need to use the dimensions of the layout in 1080p.

You can find the dimensions of all layouts in the following support article:

- [Layout Template Dimensions](#)

With the layout dimensions, you can use the software of your choice to create the lower thirds according to your organization's guidelines. Once you have created the lower thirds, you can upload them to Socialive Studio as an overlay. For instructions to upload overlays, refer to the following support article:

- [Using Audio, Video, and Graphic Overlays](#)
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### 3. Reviewing and Distributing the Final Recording

Once you've finished recording or streaming live, the final broadcast recording will appear in the Socialive Recordings Library. If you recorded the video for on-demand distribution, you can use the following functionalities to distribute the videos:

- Download the video recording
- Send the video recording to integrated third-party applications (e.g., Google Drive, SharePoint, VBrick, etc.)

#### Downloading the Recording

For instructions to download the recording, refer to the following support article:

- [Viewing and Downloading Recordings of Previous Broadcasts](#)

#### Sending Recordings to Integrated Applications

Socialive integrates with popular enterprise tools such as storage applications, video platforms, marketing tools, and other video editing software platforms. Producers can send their recordings directly to these external applications with one click.

#### Setting Up the Integrations

Currently, we support the following applications:

- Google Drive
- Dropbox
- OneDrive
- SharePoint
- Brightcove

- Kaltura
- Wistia
- Frame.io
- Vbrick
- Sprinklr
- Sprout Social
- Vimeo
- Workplace by meta
- Slack
- SFTP
- AWS S3

Before you can start sending recordings to these applications, you need to connect them to Socialive. You can find instructions to connect to all the platforms we currently support in this support center articles folder:

- [Socialive Integrations](#)

## Sending Recordings

Once the integrations are created, you can send recordings from Socialive to those applications by following the steps in the following support article:

- [Sending Recordings to an Integrated Application](#)

## Additional Resources

For more information on how to use the platform, refer to our documentation in the [Socialive Support Center](#) and learning resources in the [Socialive Learning Hub](#).

If you encounter any issues, please contact **Socialive Support** for assistance via live chat, email at [support@socialive.us](mailto:support@socialive.us), or [submit a support ticket](#).