

You **Tube**™
CHANNEL
BASICS

12 Easy Steps from Setup to Upload
that Will Rock your Biz!



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Step 1: Open a YouTube Account



1. Go to <http://Youtube.com> and sign up for an account. It's easy. On the first page there will not be a "Create an Account" button. First, click on the "Sign In" button.
2. The next screen will allow you to click on "Create an Account" button.
3. **Tip:** If you already have a Google account, you can link your YouTube account to those; otherwise, complete the information YouTube is requesting (see image below).

A screenshot of the YouTube account creation form. The form is titled 'Name' and has two input fields. Below that is 'Choose a Google username' with an input field and '@gmail.com' to its right. Then 'Create a password' with an input field. 'Confirm your password' with an input field. 'Birthday' with a 'Month' dropdown and two input fields. 'Gender' with a dropdown menu showing 'I am...'. 'Mobile phone' with an input field. 'Your current email address' with an input field. At the bottom is 'Prove you're not a robot' with a checkbox and the text 'Skip this verification (phone verification may be required)'. A red arrow points from the 'Skip this verification' checkbox to the 'ruth@ruthsherman.com' email address in the next screenshot.

4. Once you're registered, at the upper right, you will see the email address for your account. Mine is `ruth@ruthsherman.com` as you can see in the image below.



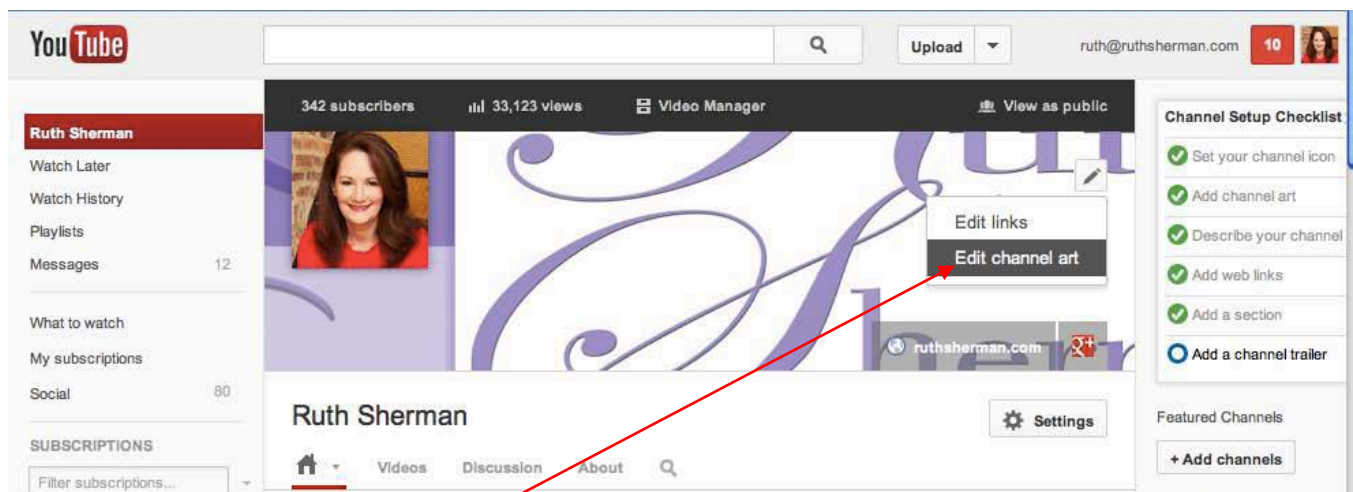
Step 2: Begin Setting Up Your Channel

1. If you explore this page, you will see that YouTube is showing me recently uploaded videos from channels I'm subscribed to and suggesting channels for me to subscribe to.
2. Click on the arrow next to your image which will activate the drop-down menu. You'll have 4 choices. Choose and click on **"My Channel."** See below:

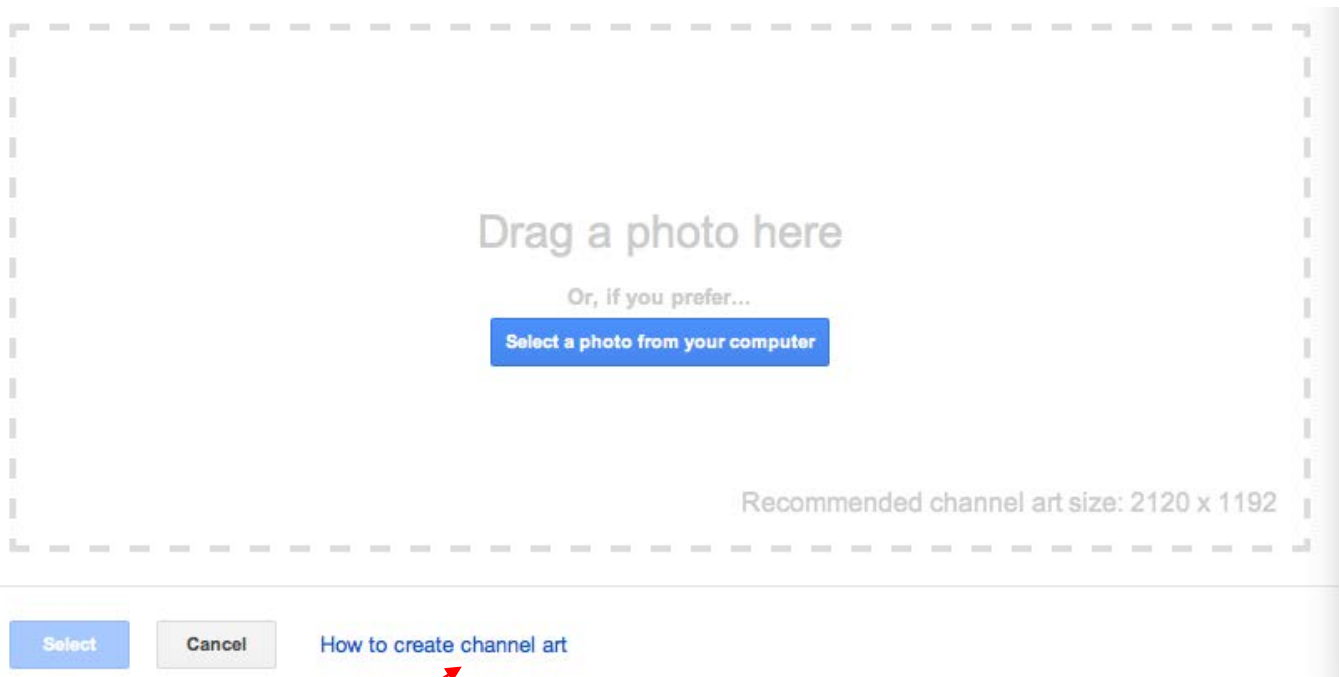
The screenshot shows the YouTube interface for user Ruth Sherman. At the top, there's a search bar, an 'Upload' button, and the user's profile information (ruth@ruthsherman.com, 10 notifications). Below this are navigation tabs for 'Favorites', 'Watch Later', and 'Likes'. The main navigation bar includes 'YouTube' (with a red arrow pointing to 'My channel'), 'Video Manager', 'Subscriptions', and 'YouTube settings'. To the right, under 'Google account', there are links for 'Profile', 'Google+', 'Privacy Settings', 'Sign out', and 'Switch account'. The left sidebar shows the user's name, 'Watch Later', 'Watch History', 'Playlists', and 'Messages'. The main content area features a 'Welcome to the YouTube homepage' message, a video upload notification from CSASmartGroup, and a recommended video 'Change Your Thoughts, Change Your Life, With Dr Wayne Dyer' by Paul Malachowski. The right sidebar shows 'Recommended Channels' including 'The You Generati...', 'TEDx Talks', 'Roomie Music', 'SPIRIT JUNKIE T...', 'MarieTV', and 'TheDazbar2'.

Step 2: Begin Setting Up Your Channel (continued)

3. Below is a picture of my channel. You'll see yours...



4. If you hover over the upper right corner of your banner area you will see an edit icon appear and a drop-down menu. Choose "Edit channel art." This will take you to the below page...



5. But don't just upload, and ignore the recommended channel art size of 2120 x 1192. That is just the size of the area that will appear best on a variety of devices (desktop, tablet, mobile). Instead click on this link for the specs.

Step 2: Begin Setting Up Your Channel (continued)

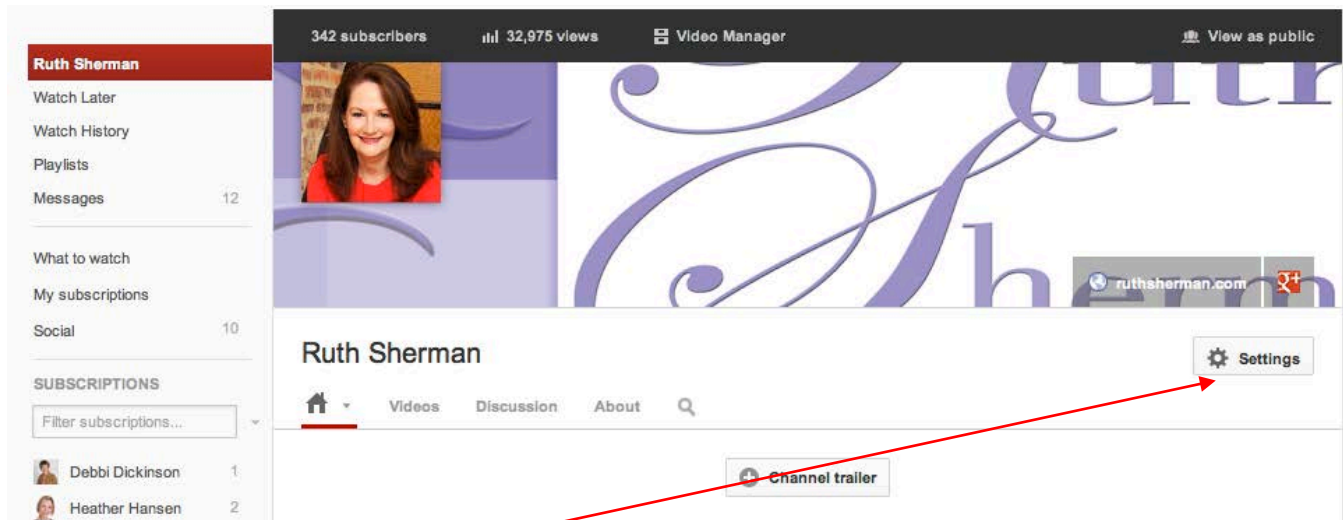
6. Here is your next step



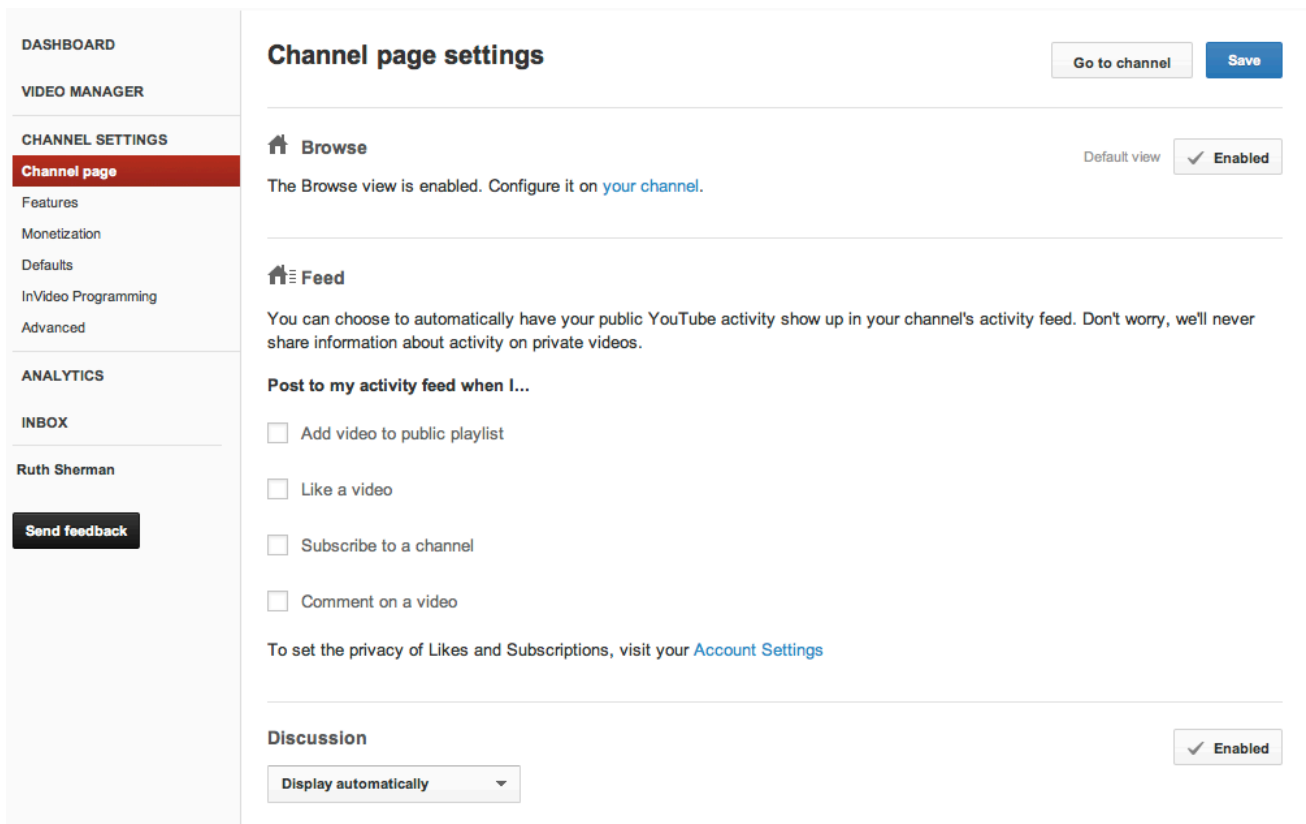
NOTE: You may need some help with this. I did. In fact, as of this writing, it is so new, I haven't mastered it yet.

The YouTube Help page for this is: <http://tinyurl.com/RuthShermanYouTube>

Step 2: Begin Setting Up Your Channel (continued)







7. Next, click on "Settings."
8. The Channel page settings will come up. Image is below. To further set up your channel, click the other options under Channel Settings: Features, Monetization, Defaults, InVideo Programming, and Advanced. **NOTE:** You may not have all these options available until you've been with YouTube awhile and they have vetted your usage.



Step 3: Features Tab

1. Under the Channel Settings click on “Features.”
2. The first 3 items will let you know your “standing” within YouTube. They are vigilant, for example about protecting copyrights and preventing abuse.
3. From the features section, you can choose to Monetize your videos (if available to you), and you’ll be able to upload videos longer than 15 minutes (if available to you).
4. Explore the remainder to see what’s available to you and whether you wish to take advantage.

Community guidelines	 Good standing	
Copyright strikes	 Good standing	
Content ID claims	 Good standing	
Feature	Status	Description
Monetization	<input type="button" value="Enable"/>	Become a partner through monetization by displaying ads on your videos. Learn more
Unlimited Uploads	<input type="button" value="Enable"/>	Upload videos longer than 15 minutes. Learn more
External Annotations	<input type="radio"/>	Link Annotations to your associated websites or merch partners. Learn More
Custom Thumbnails	<input type="radio"/>	Your account is not eligible at this time. Learn more
Content ID Appeals	<input type="button" value="Enable"/>	Verify your account to appeal rejected Content ID disputes. Learn more
Unlisted and Private Videos		You may change your videos' privacy settings. Learn more

Step 4: Defaults Tab

1. Click next on the “Defaults” link. This is where you will set up your defaults for your channel. You will still be able to change the settings for individual videos. Make sure to click the “Save” button in the upper right-hand corner before moving to your next step.

IMPORTANT: At the bottom, you will see comments and responses. Click all of these because interaction on YouTube is where the magic and SEO happen (see page 13, Step 10).

Upload Defaults

Save

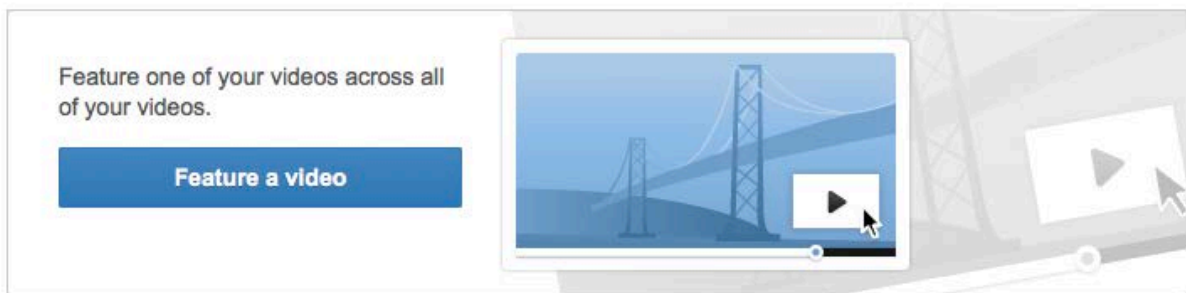
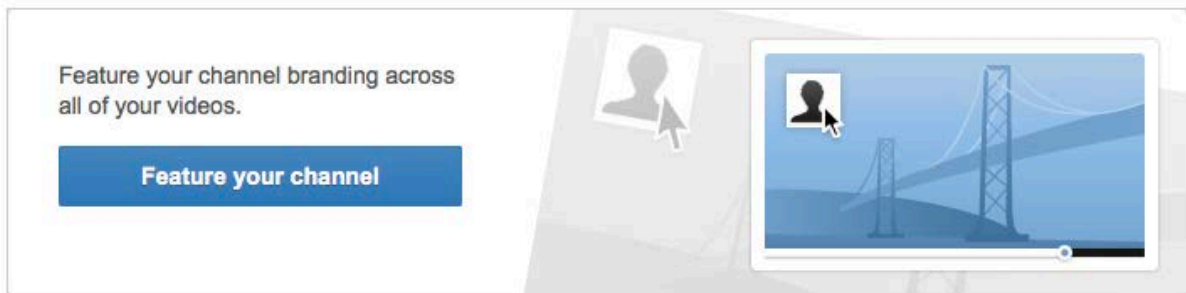
Set defaults below for future uploads. These settings can be overridden on individual videos.

Privacy	<input type="text" value="Public"/>
Category	<input type="text" value="Choose category"/>
License	<input type="text" value="Standard YouTube License"/>
Title	<input type="text"/>
Description	<input type="text"/>
Tags	<input type="text"/>
Comments and Responses	<input checked="" type="checkbox"/> Allow comments <input type="text" value="All"/> <input checked="" type="checkbox"/> Users can vote on comments <input checked="" type="checkbox"/> Users can view ratings for this video <input checked="" type="checkbox"/> Allow video responses: <input type="text" value="Approved"/>
Suggest video improvements	<input type="text" value="Show edit suggestions"/>
Video location	<input type="text"/> <input type="button" value="Search"/>

Step 5: InVideo Programming Tab

1. Click on “InVideo Programming” next.
2. Click on “Feature your channel” to add your logo or image you’d like to feature that will appear in your video, such as your headshot or logo. You might want to put a logo in your video.
3. Click on “Feature a video” and choose a video from our uploads. This is kind of a cool, new feature that allows you to select a video that appears in the lower right corner of every video like an ad. You can choose to have it appear for only a few seconds or through the entire video.

Drive viewership to a specific video and reinforce channel branding using InVideo Programming across all your videos.



You can track all your InVideo Programming campaigns by downloading the report. [Download](#)

Step 6: Advanced Tab

1. Click on “Advanced” and from here choose whether to display advertisements (if you have your videos monetized) and channel recommendations.
2. Make sure to Save your changes in the upper right-hand corner by clicking “Save.”

Advertisements

- Allow advertisements to be displayed alongside my videos
- Do not allow advertisements to be displayed alongside my videos

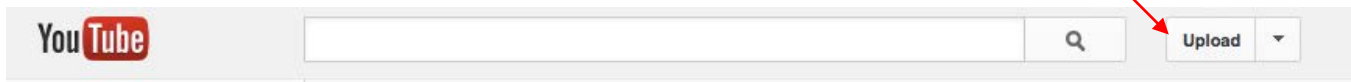
Ads will only be displayed for videos where you own all the rights. Choosing this option will disable any monetization options that have been set for your video.

Channel recommendations

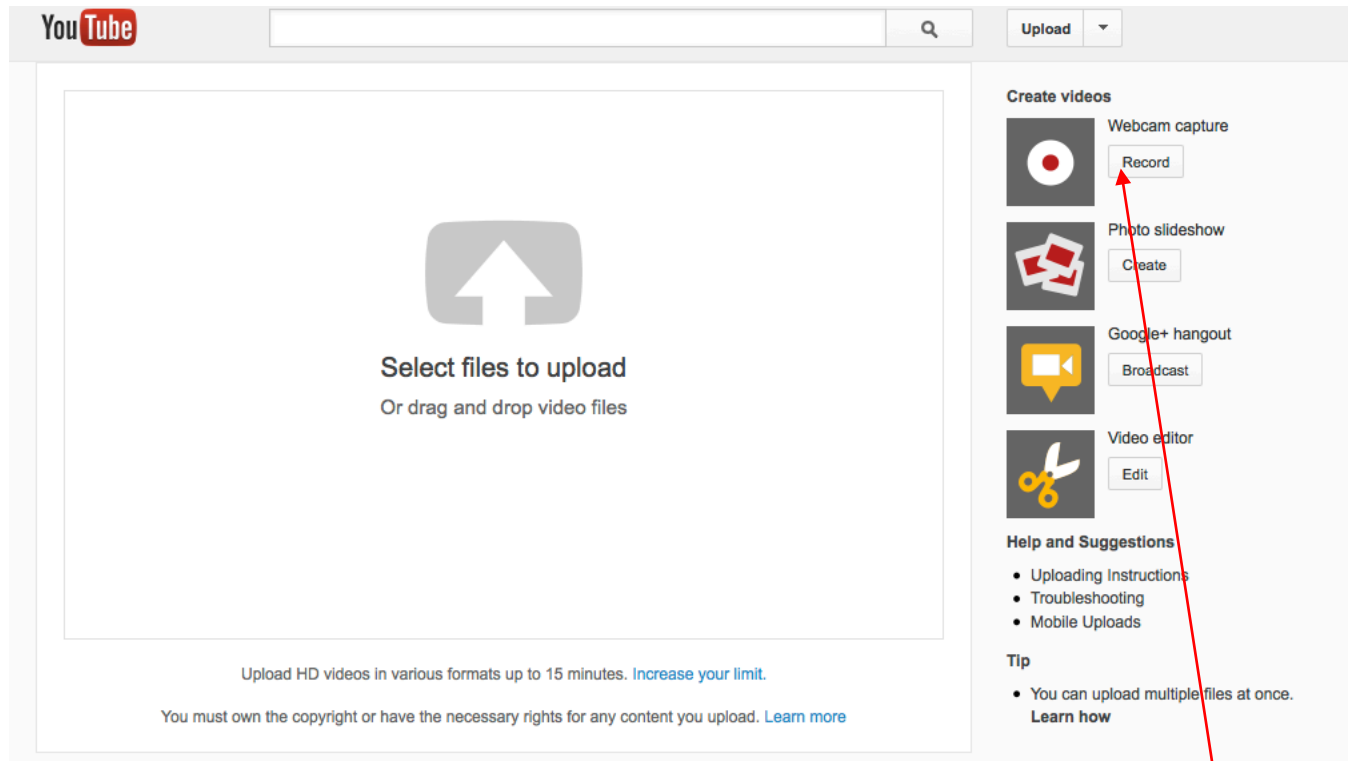
- Allow my channel to appear in other channels' recommendations
 - Do not allow my channel to appear in other channels' recommendations
-

Step 7: Uploading Videos

1. Click the "Upload" button – not the arrow next to the word Upload, but the word "upload."



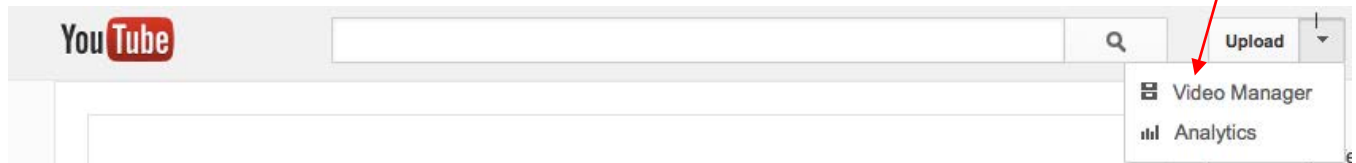
You'll be taken to the page displayed below:



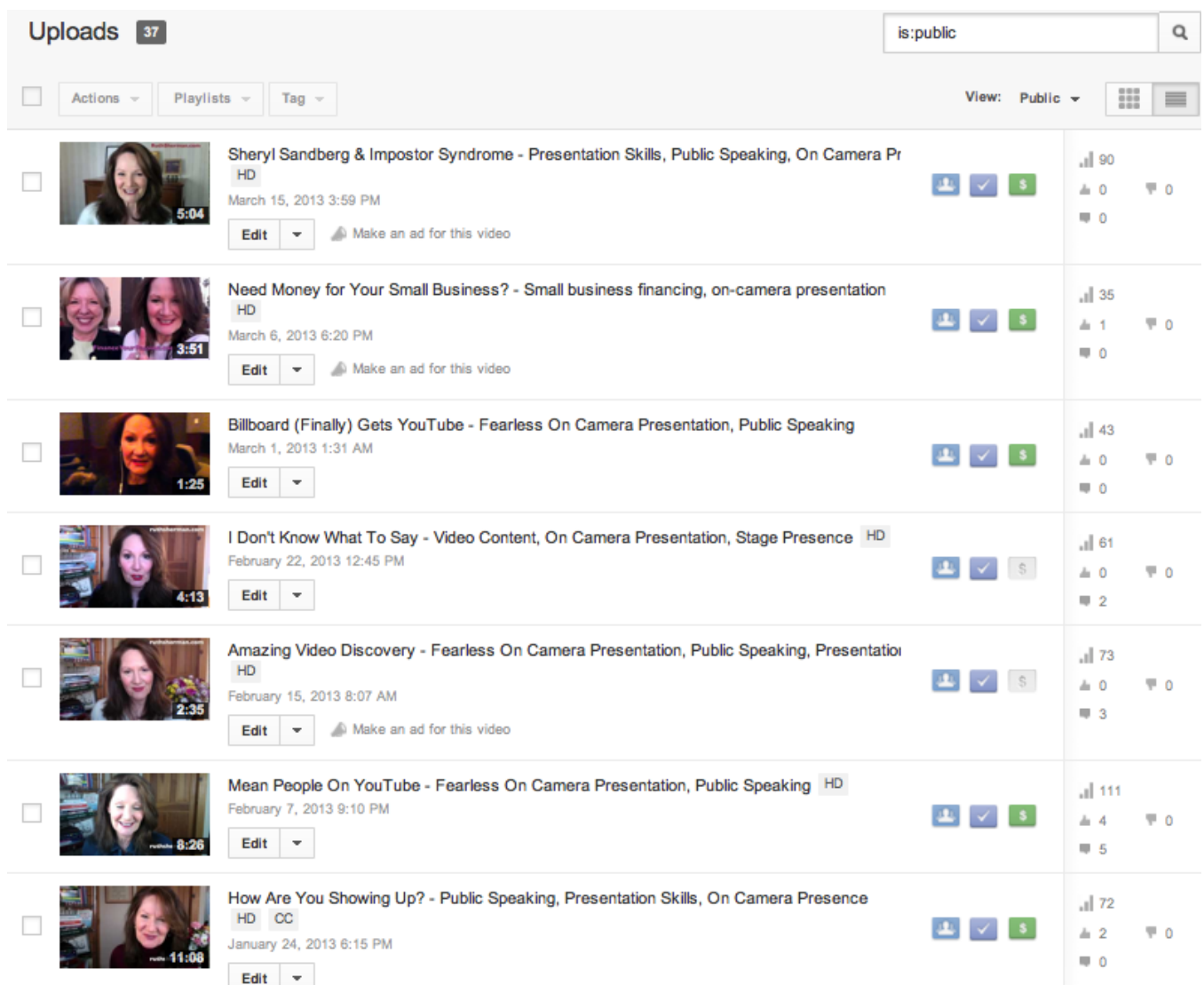
2. You can upload your video from a file or record directly onto YouTube using your webcam (webcam capture button on right). You can also drag a file to the upload box (that's what I do).
3. There are additional options including putting together a photo slideshow, doing a Google Hangout Broadcast (exciting new live streaming feature), and you can also edit your videos.
4. As your video is uploading you'll see a progress window and you'll be able to add content and select a variety of setting that will help your video get viewed.

Step 8: Optimizing Your Videos

1. This time click on the arrow next to the word “upload” and on the drop down menu, click “Video Manager.” You may also click on the dropdown next to your logo in the upper right-hand corner and choose **Video Manager**.



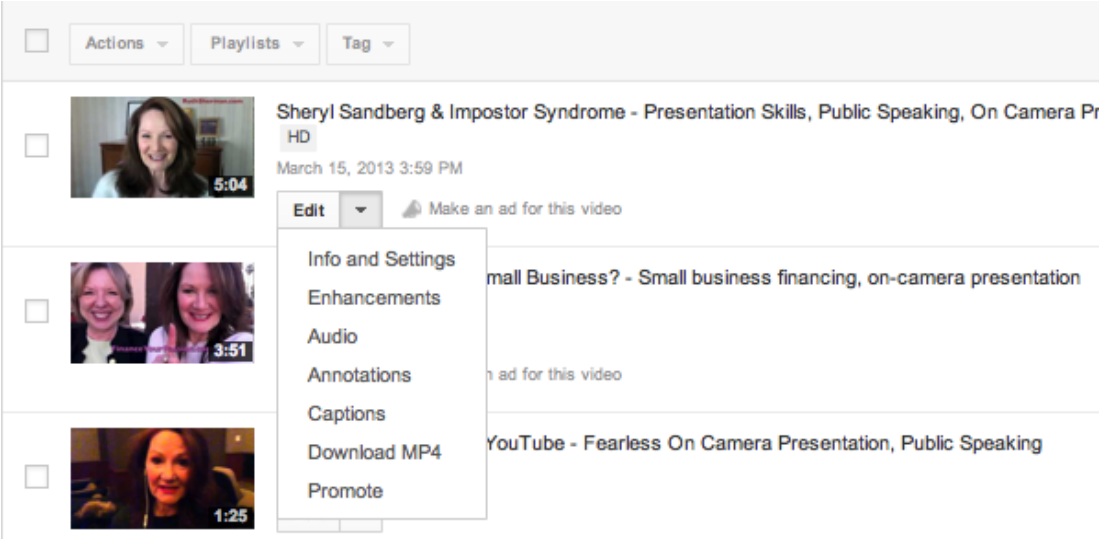
2. Your videos will then be listed including thumbnails and information. Each video has its own menu (see image below).

A screenshot of the YouTube 'Uploads' page. The page shows a list of seven videos. Each video entry includes a checkbox, a thumbnail, a title, a duration, a date, and a menu of actions (Share, Check, Monetize, Edit, Make an ad). To the right of each video is a statistics column showing view counts, likes, and dislikes. The videos are sorted by date, with the most recent at the top.

Video Title	Duration	Date	Views	Likes	Dislikes
Sheryl Sandberg & Impostor Syndrome - Presentation Skills, Public Speaking, On Camera Pr	5:04	March 15, 2013 3:59 PM	90	0	0
Need Money for Your Small Business? - Small business financing, on-camera presentation	3:51	March 6, 2013 6:20 PM	35	1	0
Billboard (Finally) Gets YouTube - Fearless On Camera Presentation, Public Speaking	1:25	March 1, 2013 1:31 AM	43	0	0
I Don't Know What To Say - Video Content, On Camera Presentation, Stage Presence	4:13	February 22, 2013 12:45 PM	61	0	0
Amazing Video Discovery - Fearless On Camera Presentation, Public Speaking, Presentati	2:35	February 15, 2013 8:07 AM	73	0	0
Mean People On YouTube - Fearless On Camera Presentation, Public Speaking	8:26	February 7, 2013 9:10 PM	111	4	0
How Are You Showing Up? - Public Speaking, Presentation Skills, On Camera Presence	11:08	January 24, 2013 6:15 PM	72	2	0

Step 9: Adding Video Titles, Content & Links

1. Click on the box next to the video you want to edit, click on the arrow, and then Info and Settings.



The screenshot shows a list of three videos. The first video is selected, and its 'Edit' dropdown menu is open, showing options: Info and Settings, Enhancements, Audio, Annotations, Captions, Download MP4, and Promote. Below the video list, the 'Basic Info' tab is active, showing the video's title, description, tags, privacy settings, and sharing options.

Basic Info | Monetization | Advanced Settings

Title
Sheryl Sandberg & Impostor Syndrome - Presentation Skills, Public Speaking, On Camera I

Description
<http://ruthsherman.com>
Sheryl Sandberg, the COO of Facebook, has written a new book entitled, Lean In: Women, Work, and the Will to Lead, in which she sheds some light on her struggle with "Impostor Syndrome." That's the feeling a lot of women (and I suspect men) have

Tags
Ruth Sherman | Sheryl Sandberg | Facebook
speak confidently on camera | fearless public speaking | video

Privacy Settings
Public
Anyone can search for and view

Post to your subscribers
Customize your message

Also share to
g+ | f | t

Category
Howto & Style

2. **Title:** You need a good title. Titles do have limitations on length, but they can still be fairly long. Go for as much title content as possible.
 - a. Include your name or business name.
 - b. After your main title, put a hyphen (-) and add a couple of your major keywords.
 - i. Example: Ruth Sherman on Sheryl Sandberg and Impostor Syndrome - Presentation Skills, Public Speaking, On-Camera Presence
3. **Description:** Again, there are limits, but you can add a lot and the more, the better.
 - a. First, add your website URL and include the http:// part because it's easier for search engines to find and it appears just below your video as a clickable link for anyone who lands on your video.
 - b. Transcribe your video and add that text below your URL, or copy and paste your blog. The more content, the better. Try to include your tags or keywords here.
4. **Tags:** There is a limit and YouTube is mysterious about it, so it's trial and error. I've saved my tags in a word doc (comma separated) so I can just cut and paste. I've also left room to add 2-3 additional ones if necessary.

Step 9: Adding Video Titles, Content & Links (continued)

5. **Privacy Settings:** Of the three choices, two are most relevant – **Public** and **Unlisted**. (**Private** requires viewers to have an account and be provided a password. It is quite cumbersome.)
 - c. **Public:** Anyone searching your keywords can find your video. It will appear on your channel and in your listings.
 - d. **Unlisted:** Only people with the URL to the specific video will be likely to find it. It will NOT appear on your channel or in your listings. This is a great alternative to Private. So, for example, you can make a personalized video, speaking directly to a client about something specific, mark it as **Unlisted**, send the link to your recipient and it is unlikely anyone else will ever see it.
6. **Post to Your Subscribers:** This aspect is enabled and cannot be disabled. If you don't want to post to subscribers, you can mark it "unlisted." (See above.) You can also share with Social Media. **NOTE:** I have that enabled, but be mindful that every comment that is posted, even the snarky or mean (or obscene) ones as well as your responses, will appear in your social media feed. Be careful and vigilant!

(See next page for further information about how to deal with trolls.)
7. **Category:** Self-explanatory, but choose one from the very limited list.

IMPORTANT: I strongly advise keeping any confidential information off of YouTube entirely, even a video marked **Private**.

Privacy Settings

Public

Anyone can search for and view

Post to your subscribers



Customize your message

Also share to

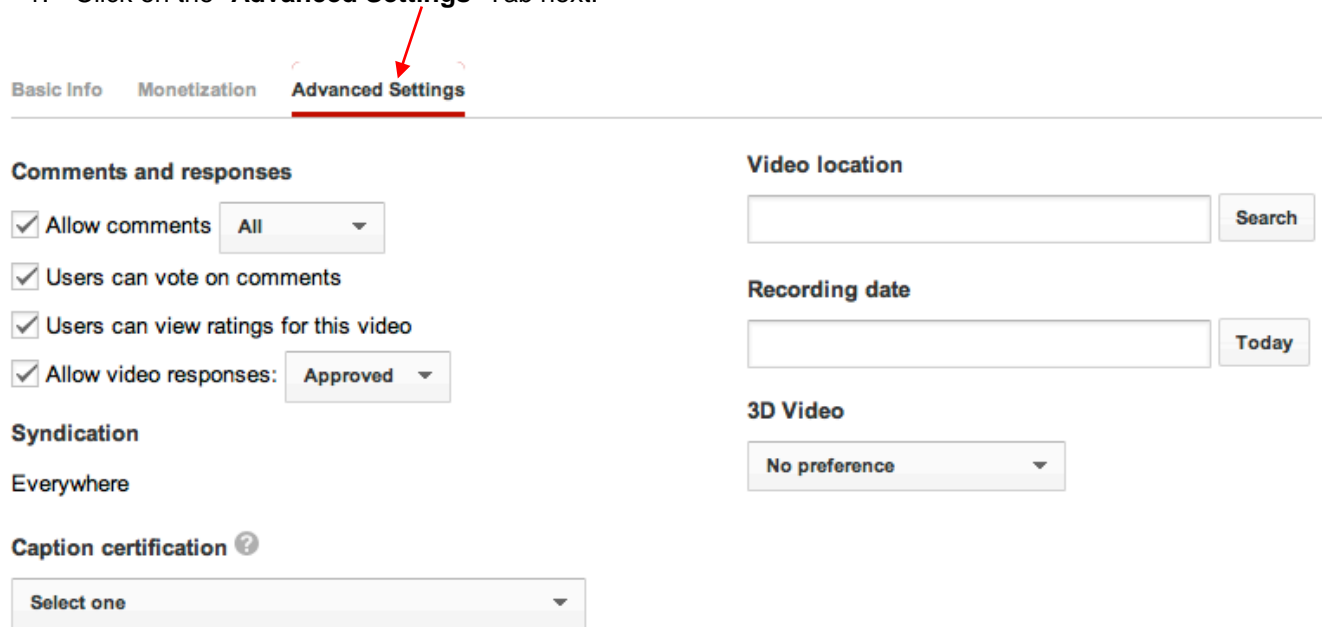


Category

Howto & Style

Step 10: Broadcasting and Sharing Videos

1. Click on the “Advanced Settings” Tab next.



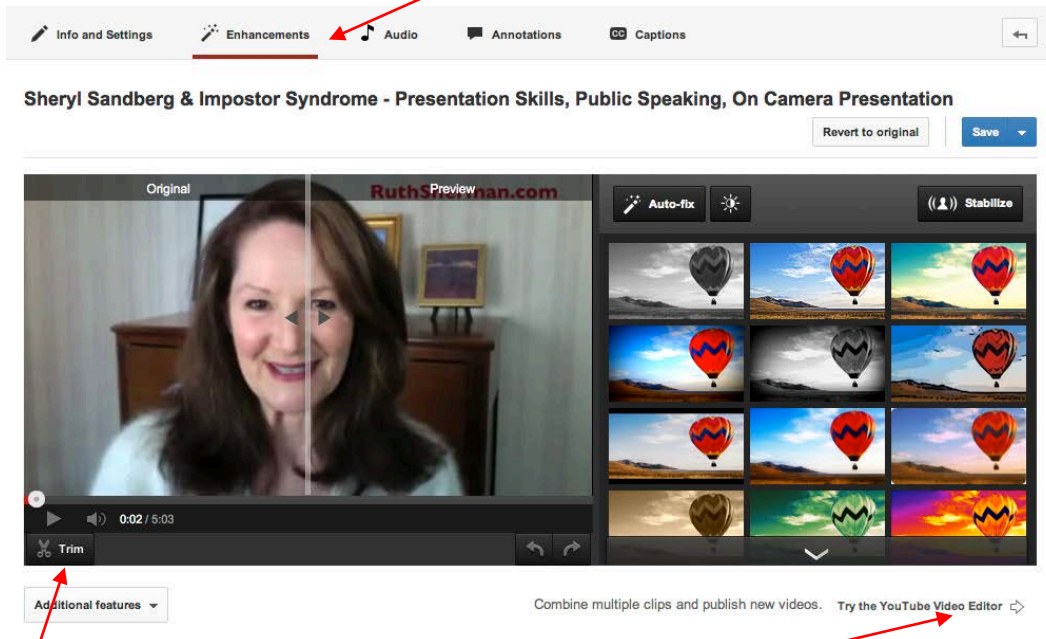
The screenshot shows the YouTube video settings interface with the 'Advanced Settings' tab selected. A red arrow points to the 'Advanced Settings' tab. The settings are organized into several sections:

- Comments and responses:** Includes checkboxes for 'Allow comments' (checked), 'Users can vote on comments' (checked), 'Users can view ratings for this video' (checked), and 'Allow video responses' (checked). There are dropdown menus for 'All' (under Allow comments) and 'Approved' (under Allow video responses).
- Syndication:** A dropdown menu set to 'Everywhere'.
- Caption certification:** A dropdown menu set to 'Select one'.
- Video location:** An empty text input field and a 'Search' button.
- Recording date:** An empty text input field and a 'Today' button.
- 3D Video:** A dropdown menu set to 'No preference'.

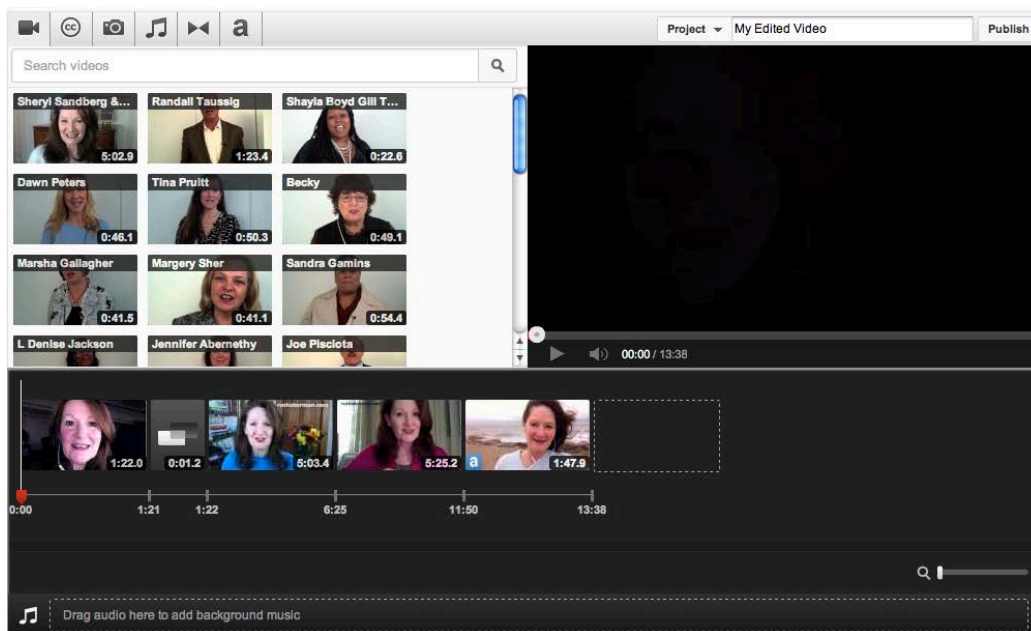
1. **Comments:** Allow comments. Pluses: will aid findability. Minuses: will invite spam and snark. You can always delete and/or flag offensive comments. YouTube acts quickly to discipline bad actors (a.k.a., trolls). People have very bad manners, so if I detect something like that, I try to engage the person in a productive way. Usually works. The whole idea is to get a conversation going. The more input, the more findable you become.
2. **Comment Voting:** I'm not crazy about this one, but I allow it for the same reason as #2.
3. **Users can rate this Video, Video Responses, Embedding, and Syndication** should all be explored. Embedding and Syndication concern whether you want your videos to appear on others' sites. I have them all enabled.
4. **Allow video Responses:** I allow video responses, which are fantastic ways to increase your SEO
5. **SAVE CHANGES.**

Step 11: Editing Your Videos with Video Editor

1. From the **Video Manager** page click on **“Enhancements.”** This function will enable you to edit a single video, add text, add transitions, and splice/edit videos together.



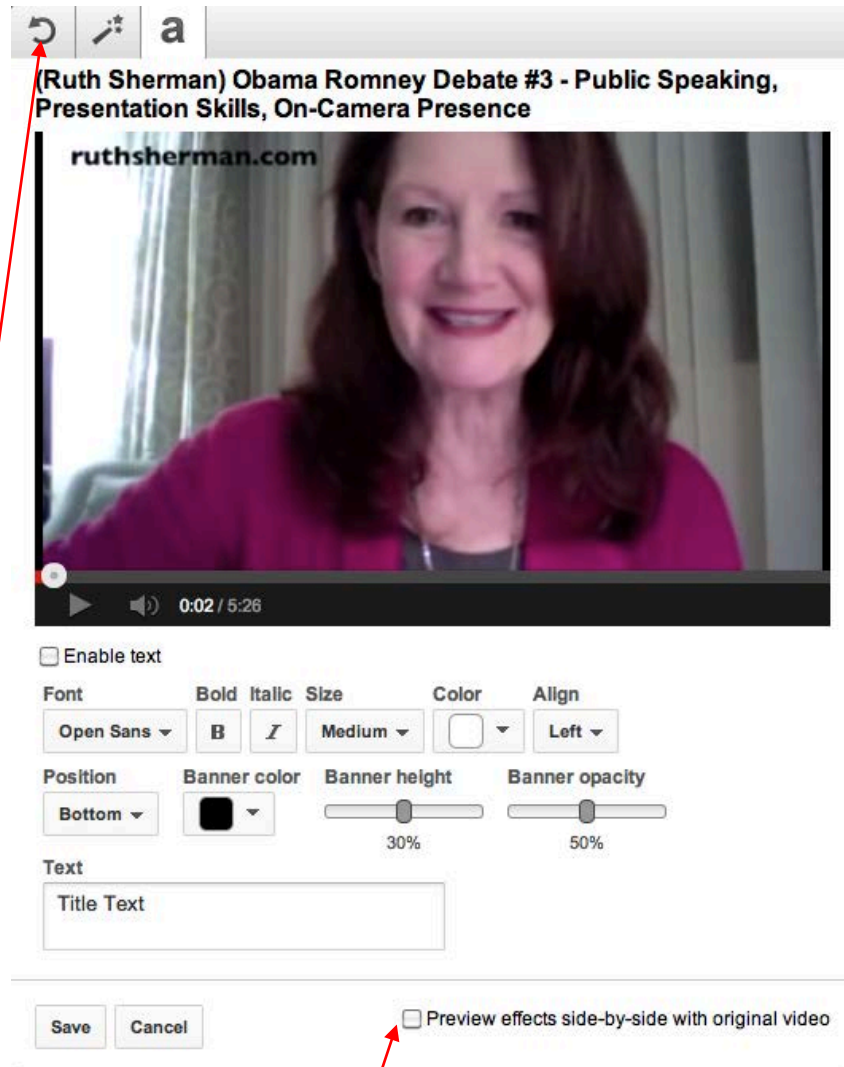
2. “Trim” is a great feature, allowing you to cut out the beginning and end of your video, the times when you’re starting and stopping the recording.
3. Next, click on “Try the YouTube Video Editor.” **You’ll be taken to the page below.**



4. This enables you to edit video clips together. Thumbnails of all your uploaded videos will appear above left that you drag to the timeline. Above right is your preview window. You can add transitions (▶◀) between your clips, and at the very bottom is the audio track. (See next page.)

Step 11: Editing Your Videos with Video Editor (continued)

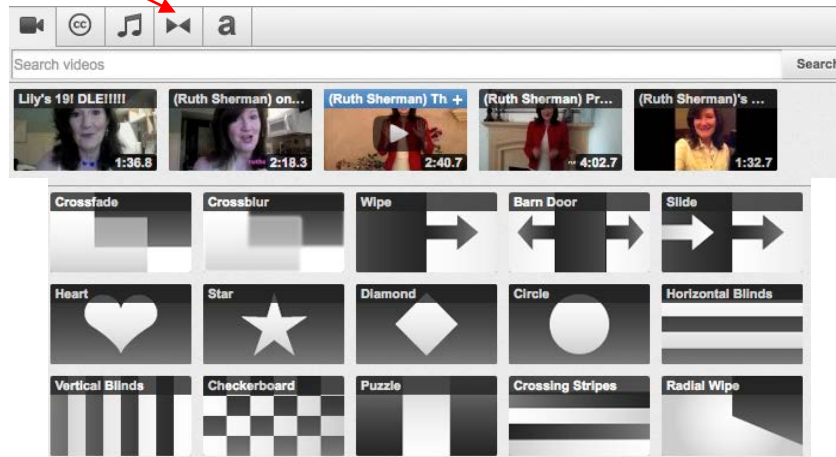
5. To edit a video drag it into the storyline, and click on it.
6. (Note: Drag any of your videos into the empty outlined box displayed below your videos. **Video Editor** will then create another outlined box so you can drag another video into the box if you want. This enables you to put videos together. But you don't have to do that. You can work with one video at a time.)
7. After dragging your video to the box, click on it to edit it. A snapshot of what you will see is below



8. There are three icons, moving from left to right: rotate, effects, and text. Rotate is self-explanatory, effects include brightness & contrast, change your video to black and white, and stabilize video, and text is for adding text to your videos. I never use any but the third one.
9. By clicking the “**Preview effects side-by-side with original video**” box, you can see the difference before and after as you edit.
10. **Remember to SAVE any changes. And don't worry, your original video will be saved.**

Step 11: Editing Your Videos with Video Editor (continued)

11. Once you **SAVE**, your video will no longer pop out and you'll be able to add transitions, which are elements that can smooth the opening and closing of a video, as well as transition between videos.
12. Click the icon that looks like this: ▶◀. This is the transitions button.



13. The images above are a snapshot of your choices. Crossfade and Crossblur are the best and most elegant. The others are distracting. Drag one to the narrow bars to either side of your video. Play to see your transition making sure you didn't cut something important off.

Trimming a Video


14. To Trim (shorten) a video, click on the name of the video in the timeline and two bars will appear as shown on the next page. This feature is perfect for eliminating the times at the beginning and end when you are pressing "record" and pressing stop.

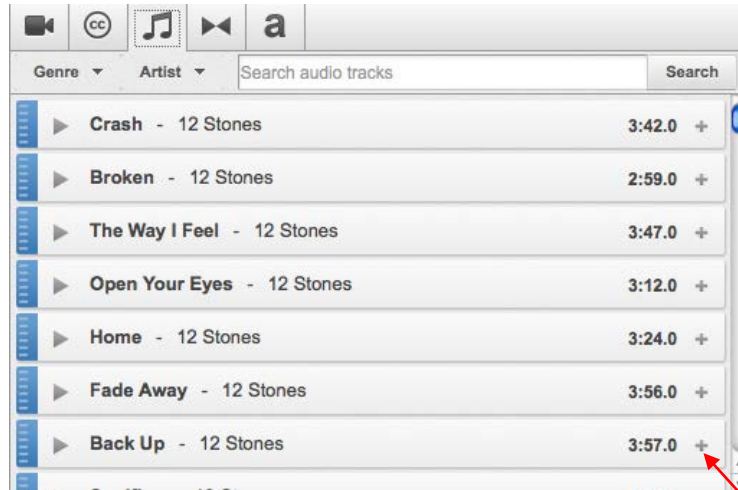


15. Click and drag either the right or left bar to shorten the length of the film.

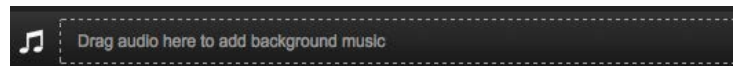
Step 11: Editing Your Videos with Video Editor (continued)

Adding Audio**

16. Click on the  icon and different choices of music will drop down as shown below.
- 17.



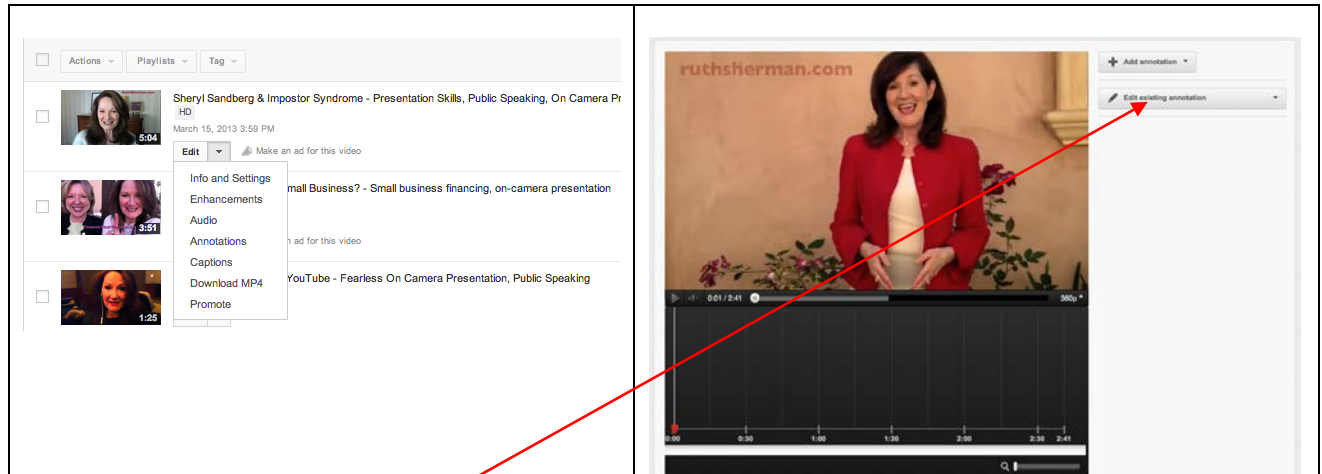
18. The icon to the left of the name of the track when clicked will play the audio track and the length of the track is to the right of the track name.
19. There are two ways to add an audio track to your video. One way is to click and drag the track to the bottom of your video where indicated (see image below). The other way is to click on the plus sign next to the noted length of the track and the track will be added to the video you have highlighted.



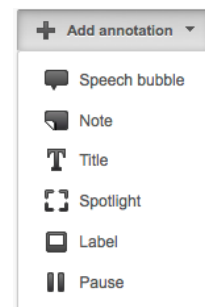
****Warning**** If you add audio from YouTube, your original audio may be deleted.

Step 12: Annotations

1. **Annotations** is the word YouTube uses to add text that sits on your videos that is similar to what you may see on TV news broadcasts. (I call them Captions, but YouTube refers to “closed captions” as Captions.) You can put your name, a video title, or any other text. You can even make the annotations link to another YouTube video (but not another website).
2. Return to the **Video Manager** page. Click in the box next to the video you will edit and from the drop down box, choose “**Annotations.**” The image below to the right (below) is the next page that will appear.



1. Click on “**Add annotation**” and a drop down will appear →→→→→→→→
2. You’ll be given a choice as to what type of Annotation you want to display. Both **Note** and **Title** are good ones. Once you select an Annotation, you can make it larger or smaller or move it by manipulating the handles. Type in the text you want to appear.
3. You will see where the Annotation is within the video and you can drag it so it appears elsewhere or lengthen or shorten its duration. You can be very precise in your editing by utilizing the **Timing** function.
4. You can also choose the **font size, color, and background** of the text box. There are choices for transparent text boxes or solid text boxes. Experiment to see which colors, sizes and backgrounds work in your video.
5. **Remember to SAVE and PUBLISH your work so you can begin sharing your videos with others.** You will have the option of returning to this video later to continue working. If you **Publish**, the video will be altered. BUT, you will still be able to go back and remove any new annotations and return it to its original condition.



That's It!

There is much, much more to explore in YouTube, but now you have mastered the basics – more than the basics, actually.

Now get out there and shoot videos – lots of videos – because the more you shoot, the better you'll become and the more prospects and clients you'll be able to attract!

Have fun!