



## ••• Virtual or Remote Collaboration

Process, Tools and Techniques of practicing UCD remotely

For UPA MN on August 14<sup>th</sup>, 2003

# ••• Topics



- Remote Process
  - Plan and execute remote meetings
  - Checklists
- Remote Tools
  - Communication tools
  - Sharing tools
  - Monitoring tools
- Remote Techniques
  - Requirements review
  - Design Walkthroughs
  - Usability Reviews
  - Surveys



## Remote Process



- Communication patterns need to be more formal
- Communication channels need to be defined
  - Scheduled emails, phone calls, report practices
- Plan your meetings
  - Agenda, Dial in numbers, Website URLs, Conferencing tool instructions, Time Zones
  - Record Action items, Owner and Due Dates
- Some Face to Face should be part of a long term project



# Process

## Setting up an International Conference checklist:

- Determine the best time for all time zones involved [www.worldtimeserver.com](http://www.worldtimeserver.com)
- Send out agenda and contact instructions in advance
- Send out reminders to download or update tools before the meeting
- Assign a note taker to capture action items, owners, and due dates
- Set up next meeting with everyone on the phone
- Speak more slowly and clearly
- Check periodically for connection and comprehension



## Remote Tools



- Email, Postal Mail
- Instant Messaging
- Conferences/Meetings
  - Teleconferences, Video conferences, Web conferences
    - Presentation Tools – Placeware (MsOffice Live)
    - Collaboration Tools – WebEx, Netmeeting, AppShare
- Project/Document Repositories – Websites, variety of tools, we use our own products, Teamcenter Community-Enterprise-Engineering



# Tools

## Tips and tricks:

- Shared calendar system
- Shared document repository
  - Set up folder hierarchies
  - File Naming guidelines
- Line numbers on code, Page numbers in docs
- Use document templates
- Use the best tool for the circumstance
  - Access, Effectiveness, Cost
- Provide training on the process and the tools
- Get feedback when using tools



## Remote Techniques

- User and Task Analysis
  - Online Card Sorting
- Design Reviews
  - Online Conceptual walkthroughs
- Usability Reviews
  - Remote Usability Testing



# Techniques

## User and Task Analysis

### Online Card Sorting

- IBM ease-of-use tool for card sorting
- US-based only
- Cluster analysis on a budget
- Another data point

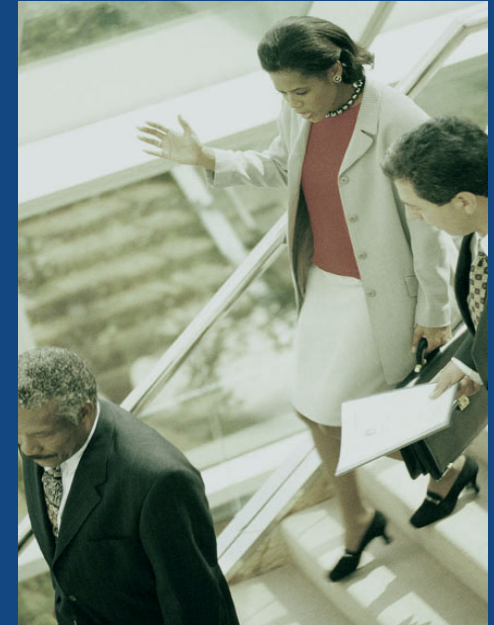


# Techniques

## User and Task Analysis

### Online Card Sorting

- Follow the Boy Scout Motto
  - Know the tool
  - Load and test the tool
  - Test it again onsite/on web site
  - Have a back-up
  - Gauge the “tech-savviness” of the users to use a remote tool
  - Offer a hard copy alternative





# Techniques

## User and Task Analysis

### Online Card Sorting

- Card sorting in context
  - User perspective
  - No business objectives
- Expect a high level of hand holding
  - Email
  - Walkthrough
  - Follow up





# Techniques Design Reviews

## Online Conceptual Walkthroughs

- **Planning an online meeting and teleconference**
  - Agenda
    - Date/Time – listed for each time zone
    - Attendee list
    - Meeting description and expected outcomes
    - Dial in number and pass code
      - International callers need to use a different dial in
    - Web URL for presentation and application sharing
      - Reminder to update and try out software
    - Attach any files or send links to files that need to be reviewed prior to the meeting
    - Upload any files you will be sharing to the conference space



# Techniques Design Reviews

## Online Conceptual Walkthroughs

- Running an online meeting and teleconference
  - Dial in to teleconference and sharing tool early
    - Close any unneeded applications
    - Only share those applications that you need to
    - Have another person verify
  - Greet others as they arrive
    - Begin as soon as quorum is reached
      - Quorum should be defined before hand and adhered to
      - Encourages folks to arrive on time
  - Gifts – if you normally give them, don't forget to mail them or send them an electronic gift certificate.

# Techniques Usability Reviews

## Remote Usability Testing

- Becoming more common
  - economy, tools, globalization, value of usability
- Benefits are obvious
  - fast and cost-efficient
- What about the challenges?



# Techniques Usability Reviews

## Remote Usability Testing - Challenges

- Language
- Culture
- Technology



# Summary



- Benefits
  - Decreased travel costs and fatigue
  - Increase the diversity of experience
  - Technology is improving
  - Expertise from different locations
  - Flexibility to connect with others from anywhere
- Drawbacks
  - Feed back delays with large time differences
  - Emails becomes a larger burden
  - Some things not appropriate for email
  - Misunderstanding can be higher, no body language cues.
  - Expectation to connect with others from anywhere!

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