

Instructions on how to contribute to this document

- Use bullet points as much as possible
- Use plain english and write short sentences
- Use the 'suggesting' edits mode (top right below the Share button)
- Don't use acronyms unless they have been elaborated in the first instance
- Please minimise the use of comments. You will see some comments from the following folk as they have editorial rights. They will also keep their comments to minimum
 - Kevin White
 - Dhruv Sharma
 - Trish Brady-Campbell
 - Suzi Macpherson
 - Fiona McAra
 - Philip Kirk
 - Victoria Heaney
- Wherever you've copy-pasted text from another source, reference it in the comment section like this: During un-moderated remote testing, participants independently complete testing without an interaction with the test moderator. Un-moderated testing is most effective when you have very specific questions about how people use a user interface for relatively straightforward tasks.
- Don't use the comments section to argue or debate with someone else. It is just not nice!
- If you have a point that you want to clarify with someone, better contact them directly and have a chat offline
- Focus on how to get the method right and not on adding to the list of tools unless extremely necessary

- Please consult existing material available on Scottish Government (SG) as well as external sources to populate these sections, rather than writing fresh guidance based on trying it out yourself. Please reference this material as well
- YouTube Links and other presentations are totally fine too so please keep adding those to helpful resources

Doing User Centred Design work remotely

As User Researchers, we have a responsibility to those participating in research, and we also need to take care of our own health and wellbeing. The guidance below attempts to address this in the best way we can at present.

Note, this guidance relates to a situation which is changing quickly. It may change over time. We will update you as and when necessary. If at any point, any of this advice contradicts official advice at a government or organisational level, then you should follow the latest official advice.

This document lays out guidance on how to carry out user centred design work when face-to-face or in-person contact is not possible. In-person UCD activities are best but sometimes this is not possible and we have to rely on remote ways of doing our work. This might pose certain challenges, such as not being able to observe participants' expressions when doing testing via phone for instance but we have to be mindful that there will always be a trade-off and we have to do our best to be rigorous in our work. This guidance takes into account the various strengths and limitations of the tools available to User Centred Design (UCD) colleagues within Scottish Government.

It is important to bear in mind that each of the remote-research tools mentioned in this guidance have their own pros and cons. UCD colleagues should consult with their teams and practice leads before deploying any of these in their work. For example, some of these tools are not usable by disabled people and others may not be suitable for the chosen 'use case' or methodology. Some of these tools might not be available to use straight away at Scottish Government-wide level, and your teams / divisions / directorates may have to procure them.

1. Methods

1.1 Usability testing

Remote usability testing allows you to conduct user research with participants in their natural environment by employing screen-sharing software.

1.1.1 Useful tools

There are 3 screen-sharing software available to Scottish Government (SG):

- Skype for Business
- VScene
- WebEx

1.1.2 Specific considerations

1.1.2.1 Recruitment

- During recruitment you will have to check whether participants are okay to download and install any necessary software, or to access URLs and other material that you will send them on their machines.
- Ensure participants are aware that they will need to be in a quiet space, indoors, with a good internet connection, and, preferably, using headphones.
- You will also need to check whether they have any specialist equipment and whether your intended tool works with their assistive technology.

1.1.2.2 Obtaining and recording permission

- You may need to obtain and record permission via email, rather than getting participants to sign paper copies of permission / consent forms.
- This can be done by sharing the permission form via email, rather than as a hard copy and accepting their email reply as a valid permission. You may need to adjust the language in your forms to reflect this change.
- Ensure that the permission form is shared in Word format and is accessible.

- You should treat these replies as you would your permission forms and apply the same level of data protection due diligence to them as you would to your written forms. For example, once you have stored such emails in your secure drive, you must delete them from your inbox as well as outbox (if applicable).

1.1.2.3 Other considerations (add to the list)

1.1.2.4 Helpful Resources

- Usability.gov Guide to [Remote Testing](#)
- Pros and cons guide on [Choosing software for remote usability testing](#)

1.2 Interviews

Telephone or online interviews allow us to conduct research with a range of participants who may for various reasons be unable or unwilling to be interviewed face to face.

1.2.1 Useful tools

- Skype for business
- Vscene
- Phone/conference number

1.2.2 Specific considerations

1.2.2.1 Recruitment

[Description]

1.2.2.2 Obtaining and recording permission

[Description]

1.2.2.3 Other considerations (add to the list)

[Description]

1.3 Workshops

[Short description]

1.3.1 Useful tools

[List of tools]

1.3.2 Specific considerations

1.3.2.1 Recruitment

[Description]

1.3.2.2 Obtaining and recording permission

[Description]

1.3.2.3 Other considerations (add to the list)

[Description]

1.4 Group Discussion

Focus groups and other group based discussions...

1.4.1 Useful tools

- Google docs

1.4.2 Specific considerations

1.4.2.1 Recruitment

[Description]

1.4.2.2 Obtaining and recording permission

[Description]

1.4.2.3 Other considerations (add to the list)

Rules of engagement are really important - e.g. muting when joining call, that there is a clear facilitator, permission to speak. Some helpful blogs:

- [Tricks for Engagement article from Miro](#)
- [The future of the workshop is remote from UX Collective](#)

1.5 Survey

[Short description]

1.5.1 Useful tools

[List of tools]

1.5.2 Specific considerations

1.5.2.1 Recruitment

[Description]

1.5.2.2 Obtaining and recording permission

[Description]

1.5.2.3 Other considerations (add to the list)

[Description]

1.6 Collaborative Sensemaking

[Short description]

1.7 Useful tools

[List of tools]

1.7.1 Specific considerations

1.7.1.1 Recruitment

[Description]

1.7.1.2 Obtaining and recording permission

[Description]

1.7.1.3 Other considerations (add to the list)

[Description]

2. Available tools

2.1 WebEx

2.1.1 What does it do?

- online video conferencing
- screen sharing
- whiteboarding
- mouse control can also be given to participants to allow them to interact with a document or web page

2.1.2 Is this tool inclusive and accessible?

- Accessibility support includes limited support for low vision (high contrast for windows OS, zoom functionality, text resizing and high contrast but only through Chrome).
- Screen reader support (works with latest version of JAWS)

2.1.3 Has this tool been subject to information security checks?

- SG approved supplier

2.1.4 When and how to use this tool?

The following is a template email to send to participants for setting up WebEx sessions. Note that participants may not read the information, so prepare for a few minutes at the start to help with setup.

Email Header: X Research session - Date of session, time of session

Email body:

Hi X,

Thank you for agreeing to take part in research with the Scottish Government. I'm getting in touch to confirm your appointment time: Monday 28th of Jan 2019 at 1.00pm, and share some details about our chat.

We'll be using a piece of software called WebEx. When you click on the link, it may ask for you to install a driver (or a packet, sometimes the wording is slightly different). If a request comes up please accept and then it should just take a few minutes to load. Using this software means that I can share my screen with you, which we need to be able to do for this research. Here is the link for our meeting:

<https://scotlandgov.webex.com/scotlandgov/j.php?MTID=mc93bb31d804eb7975db7839addc0964c>

Some WebEx tips:

- You will need to be at a laptop or desktop computer to see the screen and also take over screen control.
- Ideally, we would like to be able to see you while you chat, but if you are more comfortable you can switch off video any time.
- You should be able use your computer audio to chat and if you have headphones with a microphone that can really help.
- If you run into any problems with sound, you can call on the number below:

- Number: 03303366011 (*make sure the number is free for participants to call!*)

Passcode: 960 679 7821

If you could try to log in to the session about 5 minutes before the appointment, that would be really helpful to give everything time to load up and make sure the tech is working.

If you run into any technical issues on the day, you can give me a call on X – I'll be available from X. If I don't pick up, don't worry, I will call you back as soon as I can.

Have a lovely weekend and speak to you on Monday!

2.1.5 Usability Testing

Can only be used via a desktop app if you need to give the participant control to interact with a prototype. Participants will need to install the desktop app which can take a couple of minutes to set up.

- The user researcher needs to dial into the WebEx session on the phone as the sound on WebEx does not work when using Scots (as of March 2019).
 - Ensure you are using a work phone that is fully charged or easily able to plug in while keeping close to the computer you're running the session on.
 - Make sure the number you dial in to is the free option.
- Colleagues observing remotely
 - Most important thing is participant comfort, all observers need to be briefed to ensure the session isn't disrupted.
 - Make sure any remote observers arrive in a timely manner (or you get quite loud disruptive beeps mid-conversation) and mute their microphones straight away.

- If remote observers are on Scots, they will need to dial in on the free number as well in order to hear the conversation. Make sure they mute their microphones straight away.
- If possible, pilot technology set up with participants
 - Firstly, pilot with your colleagues to make sure you're happy and comfortable with how things should work.
 - Set aside a few hours the week before and ask participants to join for individual 5-10 minute sessions to test technology out.
 - Make it clear they need to use the set up you will be running the 'live' session on or you will be going through the same process again on research day.
 - Send them an invite with the test WebEx link, have a blank internet page open to trial screen sharing.
 - Run through the test with participants - make sure:
 - you can hear them and they can hear you
 - you can see them (if they're comfortable) and they can see you
 - you are able to hand over screen control, get them to scroll around a page and click on links
 - Provide your phone number up for any trouble-shooting calls.
 - Talk through any issues with the participant and make sure they have all the basic settings optimised - microphone on, sound up on the laptop etc.
 - If you have a technology issue but don't know how to resolve it on the day - don't panic! Note down the issue, especially any specific or technical error messaging, reassure the participant that the session will go ahead and that you will look into the problem.
 - Thank the participant for taking the time to do a test run.

More detailed instructions to follow once further testing is completed.

[step by step instruction on how to set up run this method / scenario using this tool]

2.1.6 Interviews

Can screen share and use the white board on both web app and desktop app.

More detailed instructions on how to join and use to follow.

[step by step instruction on how to set up run this method / scenario using this tool]

2.1.7 Any other?

Developing back-up if audio/video fails and functionality is kept for screen share only.

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.2 Objective Connect

2.2.1 What does it do?

[A summary of the key features of this tool]

2.2.2 Is this tool inclusive and accessible?

[A summary of whether this meets WCAG 2.1 standards and if this will exclude or put any user groups at a disadvantage]

2.2.3 Has this tool been subject to information security checks?

[A summary or link to the security check for the tool]

2.2.4 When and how to use this tool?

2.2.5 Method / Scenario

[step by step instruction on how to set up run this method / scenario]

2.2.6 Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.3 VScene

2.3.1 What does it do?

- Audio-video conferencing with SG internal and external participants
- Works with SG's existing audio and video conferencing equipment
- Works with Skype for Business which is SG's preferred tool
- Can accommodate upto 100 connections including the organiser

2.3.2 Is this tool inclusive and accessible?

This tool does not meet the basic accessibility requirements. It would be unusable by many disabled users and does not support most assistive technology.

2.3.3 Has this tool been subject to information security checks?

The tool is deployed on SCOTS. The assumption is that it complies with the necessary security checks.

2.3.4 When and how to use this tool?

2.3.5 Method / Scenario

[step by step instruction on how to set up run this method / scenario]

2.3.6 Any other

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.4 Optimal Sort

2.4.1 What does it do

[A summary of the key features of this tool]

2.4.2 Is this tool inclusive and accessible?

[A summary of whether this meets WCAG 2.1 standards and if this will exclude or put any user groups at a disadvantage]

2.4.3 Has this tool been subject to information security checks?

[A summary or link to the security check for the tool]

2.4.4 When and how to use this tool?

2.4.5 Card Sorting

[step by step instruction on how to set up run this method / scenario]

2.4.6 Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.5 Telephone

2.5.1 Is this tool inclusive and accessible?

Telephones are difficult for deaf and hard of hearing. However the [Contact-BSL](#) service can circumvent this for BSL users.

2.5.2 When and how to use this tool?

2.5.3 Card Sorting

[step by step instruction on how to set up run this method / scenario]

2.5.4 Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.6 Trello

2.6.1 What does it do

[A summary of the key features of this tool]

2.6.2 Is this tool inclusive and accessible?

[A summary of whether this meets WCAG 2.1 standards and if this will exclude or put any user groups at a disadvantage]

2.6.3 Has this tool been subject to information security checks?

[A summary or link to the security check for the tool]

2.6.4 When and how to use this tool?

2.6.5 Card Sorting

[step by step instruction on how to set up run this method / scenario]

2.6.6 Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.7 Google Docs

2.7.1 What does it do

- Documents can be created and shared for collaborative working and commentary

2.7.2 Is this tool inclusive and accessible?

[A summary of whether this meets WCAG 2.1 standards and if this will exclude or put any user groups at a disadvantage]

2.7.3 Has this tool been subject to information security checks?

[A summary or link to the security check for the tool]

2.7.4 When and how to use this tool?

- Can be useful for short term collaboration when working on a document or reviewing content

2.7.5 Card Sorting

[step by step instruction on how to set up run this method / scenario]

2.7.6 Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.8 Google Hangouts

2.8.1 What does it do

- Videoconferencing

2. Is this tool inclusive and accessible?

[A summary of whether this meets WCAG 2.1 standards and if this will exclude or put any user groups at a disadvantage]

3. Has this tool been subject to information security checks?

[A summary or link to the security check for the tool]

4. When and how to use this tool?

- [insert use cases]

5. Card Sorting

[step by step instruction on how to set up run this method / scenario]

6. Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.9 Mural

2.9.1 What does it do

[A summary of the key features of this tool]

2.9.2 Is this tool inclusive and accessible?

[A summary of whether this meets WCAG 2.1 standards and if this will exclude or put any user groups at a disadvantage]

2.9.3 Has this tool been subject to information security checks?

[A summary or link to the security check for the tool]

2.9.4 When and how to use this tool?

2.9.5 Card Sorting

[step by step instruction on how to set up run this method / scenario]

2.9.6 Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.10 Miro

2.10.1 What does it do

[A summary of the key features of this tool]

2.10.2 Is this tool inclusive and accessible?

[A summary of whether this meets WCAG 2.1 standards and if this will exclude or put any user groups at a disadvantage]

2.10.3 Has this tool been subject to information security checks?

[A summary or link to the security check for the tool]

2.10.4 When and how to use this tool?

2.10.5 Card Sorting

[step by step instruction on how to set up run this method / scenario]

2.10.6 Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]

2.11 Skype for Business

2.11.1 What does it do

This software is available to SG staff but also needs to be downloaded by the participant to work.. It allows one to share screen, record the session and have multiple observers in the session. Skype is a well-known software and some participants may feel more confident downloading it on their devices. We already use Skype for business within our organisation, but access has been restricted, which means we have faced issues when trying to contact anyone outside the organisation. If your usability testing session is with SG internal participants, you may want to consider this as it will be pre-installed onto their devices.

2.11.2 Is this tool inclusive and accessible?

[A summary of whether this meets WCAG 2.1 standards and if this will exclude or put any user groups at a disadvantage]

2.11.3 Has this tool been subject to information security checks?

[A summary or link to the security check for the tool]

2.11.4 When and how to use this tool?

2.11.5 Card Sorting

[step by step instruction on how to set up run this method / scenario]

2.11.6 Any other?

[step by step instruction on how to set up any other method(s) / scenario(s) using this tool]