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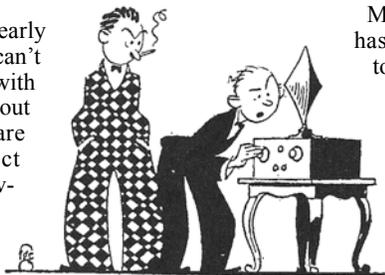
Pajama Party: Using Technology for Remote Partner Collaboration

by **Rick Branham** (Vice President Academic Library Initiatives, SirsiDynix) <rick.branham@sirsidynix.com>

When I got started in this industry a few decades ago (I often joke that it was in a child labor camp, but alas, it was my first job as a college freshman doing retrospective conversion or “recon”), online collaboration tools were just emerging: email, the web, and fax machines were considered new and cutting-edge technologies. And like any new technology, the early iterations were clunky. I remember firing up my email and getting a cup of coffee while I waited for the program to open.

As I moved up the ladder from a lowly data entry technician (transcribing library cards into MARC) to a project manager, my responsibilities required a significant amount of interaction with customers. For large projects, such as the recon of the **Yale Beinecke** rare book collection, multi-day onsite meetings were imperative. The scope of work included taxing specifications such as detailed instructions for handling hand-written provenance notes on the backs of library cards. These notes involved abbreviations and shorthand that were often specific to particular curators — different curators would use different abbreviations for the same thing. Once the project began, I would communicate several times per week with my project liaison at the library, often by faxing photocopies of card images with notes in question circled and annotated. We would have regular calls to discuss the faxes, and the whole process would sometimes take several days or weeks for resolution.

I think back to these early days of my career, and I can't image how I would cope with today's job demands without the high-tech tools that are now available for project collaboration. I'm sure every generation thinks the same thing: my ancestors likely marveled in



the 1850s at the amazing telegraph technology and how messages could zip around the world — no longer requiring the weeks or months for delivery of letters via horse and/or boat.

I'm confident that technology will improve our current tools — perhaps teleportation, holographs, internet-enabled “smart contacts” will make our current technology seem primitive. But I do believe we live in an age where participants in a project can be truly unbound by physical location and even language boundaries to cooperate effectively on a desired outcome.

I want to discuss three types of collaboration applications: conferencing, document collaboration, and prototyping. I will draw on my own experiences in each area, but I have also done my homework, and I'll point you to some good resources for evaluating tools that may work best for you.

Let's start with conferencing. While video conferencing is all the rage in many industries, I don't believe it's necessary or even desirable for every discussion. I think it's helpful in the early stages of a partnership — although an onsite meeting is usually the best option if at all possible. But once trust and rapport is established, video calls are nice if the meeting is simply a discussion. But if you're viewing slides or a demo, a video call only takes of valuable screen space, in my opinion. Besides, one of the wonderful benefits of remote conferencing is that you can do it in your pajamas and you don't have to comb your hair.

My company (**SirsiDynix**) has used many conferencing tools over the years: Adobe Connect,² WebEx,³ join.me,⁴ GoToMeeting,⁵ and Skype⁶ are just a few. Currently, WebEx and GoToMeeting are our preferred apps. All of them offer the now-standard features: tele- and

video-conferencing, screen sharing, and participant chat. But of the ones I've used, only Adobe Connect doesn't offer desirable features such as calendar integration and video recording. WebEx is the app most of us use for everyday conferencing and demos, while GoToMeeting is our choice for webinars and web events with a larger audience. GoToMeeting is full-featured, but seems to be a bit more complex for simple sessions with a few participants. That's why our marketing team has webinar hosts that control the software, while the participants do what they're told: “click this button to unmute your mic and this button to share your screen.”

WebEx, on the other hand, is quite accessible. It is easy to schedule a meeting in advance or to start an impromptu meeting, generating a link that can be emailed to participants. It's also easy for participants to join — not so for other apps I've used, which required desktop downloads and confusing configuration options in order to join. Adobe Connect — when we used it a few years ago — was such a program. In many instances, participants simply could not get the software to work, so I had to use a shared WebEx account (we held onto an account as a security blanket, even after Adobe Connect was mandated).

WebEx also has easy-to-use features that allow you to pass “control” to any participant for screen sharing. A host can also give other participants “mouse control” if you want to allow a user to try something “hands-on.” Session recording is simple: a link to the recording is generated and emailed to the host after the session ends.

Join.me, in my opinion, is an effective and very easy-to-use conferencing app. However, at the time my company used the app, there were no telephone audio options included — it required voice-over IP (VOIP). This was a bit of a deal-breaker for us, as many of our presentations and project meetings include multiple staff gathered around a star phone or some other speakerphone. Join.me has a free option that is quite full-featured and easy to use if you don't have another conferencing account. I use it now and then for personal video conferences with friends and family.

Take a look at the Aug 2017 review from *PC Magazine* for their ranking of conferencing applications.⁷ The article's editors named ClickMeeting with the Editor's Choice award, but I have no experience with this application. It's worth checking out their review, which includes a good overview of the functionality and several screenshots.⁸

Document collaboration applications are not nearly as interactive or as compelling as conferencing, but it is invaluable for effective project collaboration. Emailing documents

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Consortial Partnerships ...
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Conclusion

Virtually all academic libraries belong to one or more consortia which have become a fundamental part of the library ecosystem. Before launching a new project or licensing a new product or service, most libraries should pause to consider whether collaboration through the consortium would make sense or add value. Adding the consortium between the library and vendor does add a layer of complexity, but these partnerships

can sometimes be the most productive for all parties.

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back and forth and version control on those documents are almost as passé and primitive as the fax machine. Using modern file sharing software, users can create and edit documents collaboratively — in real time — and can mark up the documents with comments, references, links, etc.

In my experience, Google's G Suite⁹ (Docs, Sheets, and Slides) with Dropbox¹⁰ for cloud storage has emerged as my favorite collaboration combo. To start off, let's discuss cloud storage. As a global road warrior, I am constantly in different locations around the world using different devices: laptop, tablet, smart phone, customer's desktop, hotel's desktop — you name it. Having all of my 300GB of documents available to me from almost any location and any device is crucial. Furthermore, I've dealt with my share of hardware failures (I've been through 8 Microsoft Surfaces since its release), and I would be dead in the water if I had to perform disk-to-disk transfers of everything each time a machine failed me. By having all of my documents (including work documents, software downloads, pictures, and music) stored in Dropbox, changing devices is a nonevent. And if I show up at the office without my laptop (as I've been known to do a few times), I can still access all of my files from my iPhone or iPad.

The best part of using Dropbox for cloud storage is that I don't have to attach anything to emails or texts. I can simply send the recipients a Dropbox link: I'm not taking up mail server space and transmittal time, and I'm sending a link to the live document. If I make changes to the document, the link will take the recipient to the latest, up-to-date version.

File sharing and cloud storage are essential for document collaboration. While Dropbox has decent tools for making comments on existing MS Office¹¹ documents, it has only (fairly) recently launched Paper,¹² which allows for document collaboration. Meanwhile, I have become enamored with the Google G Suite of collaboration tools. The G Suite's applications, Docs, Sheets, and Slides are an alternative to the MS Office suite: Word, Excel, and PowerPoint, respectively. But Google's products have done a really good job of offering web-based editing and real-time collaboration of documents, even those that were "born" within Office.

In preparing for the **Charleston Conference** presentation that spawned this guest editing gig for *Against the Grain*, my fellow collaborators and I used Docs and Sheets to edit our presentation, and to chat online (shown on the right-hand column of the screen) as we edited. And we used our marked-up presentation outline for our *ATG* podcast, complete with real-time chat messages for encouragement and occasional snarky comments.

Since my colleagues and I have begun using the G Suite, many new apps for document collaboration have emerged that are full of



Author Bio

Rick Branham, Vice President, Academic Library Initiatives & Pre-Sales Solutions has almost three decades of experience with **SirsiDynix** including data migration, product management, business development, marketing, and sales. He currently drives **SirsiDynix's** vision and strategy for Academic libraries, and leads the Pre-sales Solutions group. Pre-Sales uses **SirsiDynix** software and its robust extensibility (through REST web services and JavaScript, primarily) to create solutions for new customers.

"There is no other industry I'd rather work in. I love the challenge of connecting cutting-edge technology with the needs of our passionate and intelligent customers." 🌱

bells and whistles. A recent review of these top applications can be found in this January 2018 review from *PC Magazine*.¹³

The final category of collaborative tools that are crucial to effective library-vendor partnerships is Prototyping software. In my career, I have been involved in many partnerships with libraries that range from product enhancements and feature development for an existing application to new application development. My company has long used the Agile Development¹⁴ method, which is an iterative process in which a small subset of features is released on a recurring cycle — often monthly or bimonthly. With such a process, the ability to show the software to partners, even before the code is actually written — is crucial to creating intuitive user interfaces. Back in the stone age when I first started my career, our product managers would hand draw "wireframes" of the proposed user interface, which would then be faxed to the team. Thankfully, technology has made huge strides and now offers software for easy creation of clickable prototypes with the ability to comment on each element on the screen.

My company has used various prototyping products, but has settled on InVision.¹⁵ This web-based application allows our User Experience (UX) Engineers an easy tool for creating each screen: buttons, drop-down menus, images, data wells — every element on a screen. The wireframes are interactive — designers create "actions" for each click that advance to the next wireframe, thus emulating how the real software will look and behave. Our UX team creates these detailed prototypes in conjunction with the software Product Managers, based on the detailed functional specifications. The "working" prototypes are then reviewed extensively with our library partners and other key stakeholders within the company. The prototypes are repeatedly refined until coding is ready to begin.

I cannot overemphasize how this process has streamlined the development process to produce software that is not only intuitive and easy to use, but that has customer buy-in even before it's released. The old days of waterfall development entailed handing developers a huge stack of functional specifications and leaving them to not only code the software but decide the best way to organize the screens. The end result was often a screen

full of seemingly random buttons and menus, which varied from developer to developer.

Another side benefit of prototyping software like InVision is that it provides an early view of forthcoming software that can be used to train staff: trainers, project managers, customer support, library partners, etc. This allows for all relevant players to properly prepare for the eventual rollout of the software — no more last-minute scrambling to implement new features or apps.

A good review of prototyping software is available from a popular UX blog called *Prototypr*.¹⁶ Make sure you don't miss the table towards the end with a comparison of key features among the top products.

If you made it to the end of this article — congratulations. I hope my experiences and sometimes-rambling anecdotes will be useful to you as you collaborate with your vendor or library partners. 🌱

Endnotes

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