Guide to Working Remotely

TOOLS, TECHNIQUES AND BEST PRACTICES

MARCH 27, 2020

Guide to Working Remotely

Tools, Techniques, and Best Practices

Contents

Resources for Remote Work

Overview

This document, compiled by the Division of Human Resources (HR), provides convenient access to important resources for working remotely. The following pages contain links to electronic tools, articles, and trainings to assist you in maintaining operational effectiveness as a member of a virtual team which is working remotely.

Tools and Technology

Below is a list of links to recommended tools and technology available to Penn staff and faculty. Please note that not all of these resources are available in every school and center, and it is recommended that you contact your Local Support Provider (LSP) with specific questions about any of these software solutions.

1. Get IT Help

Click the link above to access the directory of Local Support Providers and locate your school or center's dedicated IT support staff. Your LSP will be the best person to guide you to the tools available to your team. Direct all questions about information technology to your LSP.

2. Remote Work Tools & Guidelines

This page, maintained by the Division of Information Systems & Computing (ISC), lists many of the tools and technologies provided to Penn community members to facilitate remote communication, file sharing, and secure access to Penn resources.

The following tools are used and recommended by the Division of Human Resources. However, this is not a comprehensive list. Please visit the Remote Work Tools & Guidelines site above for a more thorough list or contact your LSP for more information.

3. University Client VPN

The University Client (GlobalProtect) VPN service is now available for the entire campus community and provides encrypted and authenticated access to the PennNet network using PennKey and Two-Step Verification. The University Client VPN service provides access to the general campus network, creating a similar experience from a remote location as if connected to AirPennNet on campus. It does not replace other Penn VPN services for secure remote access to restricted systems, such as the Data Center. To get started with the University Client VPN service go to the Getting Started Guide.

4. PennNet Phone Services

Follow the link above to configure your phone and voicemail services, including the option to have calls and voicemails forwarded to your home or personal mobile phone. Since call-forwarding absorbs a lot of bandwidth, it is recommended that you change your outgoing message to explain you are working remotely and checking voice mail frequently. You can find a guide on how to set up your PennNet phone in the Appendix of this document.

5. BlueJeans

BlueJeans is a cloud-based cross platform voice and video conferencing service that makes it easy to collaborate with your colleagues. It can be started and joined via a PC, Mac, smartphone, or regular

landline (audio only). Each meeting can accommodate up to 100 participants and supports the recording of the meeting and screen/media sharing.

All Penn employees have been provided with free accounts which includes a list of standing phone numbers for conferencing and collaboration. Refer to the Appendix for more guidance on using BlueJeans.

Note: BlueJeans may be used to communicate HIPAA data or other protected health information, however, we advise that you not record meetings that will involve such information.

6. Microsoft Teams

Teams is Microsoft's collaboration hub, providing users with the ability to chat, schedule and conduct online meetings (with screen sharing included), share and work together on files, and much more. Since it is fully integrated with the PennO365 application suite, Teams has direct access to other Office applications such as Word, Excel, PowerPoint and Outlook.

Not all schools and centers have access to Microsoft Teams. Please contact your LSP to determine your eligibility for using this product.

7. Penn+Box

Penn+Box is the University's instance of the popular Box.com cloud document storage service. This service is available for Penn faculty, staff and students to store documents in the cloud for their own use. Penn+Box is a collaboration service for sharing files and folders. Penn+Box users can manage and access contents on their web browsers, common office applications, mobile devices and even sync their data to their desktop.

In addition to file sharing, Penn+Box offers a set of applications and tools that facilitate collaboration and data sharing, while providing the assurance that University data and intellectual property are securely protected. More information on using Penn+Box is available in the Appendix.

Articles

These articles and blog posts offer tips and best practices for leading and working on remote teams.

1. Building Virtual Teams

- Making Virtual Teams Work: Ten Basic Principles
- 5 Virtual Team Building Activities That Work

2. Keeping Remote Workers Engaged

- No Face Time? No Problem: How to Keep Virtual Workers Engaged
- Creative Ways to Keep Remote Employees Engaged
- Six ways to engage virtual employees
- How to Keep Your Virtual Team Engaged
- 10 Easy Ways to Keep Remote Workers Happy and Engaged
- Rewards and Recognition: 5 Ways to Show Remote Workers Appreciation

3. Virtual Meetings

- How to Run a Great Virtual Meeting

- [How to Get People to Actually Participate in Virtual Meetings](#)
- [The 7 Rules of Virtual Meeting Etiquette Every Professional Should Know](#)
- [The ultimate guide to remote meetings in 2020](#)

4. Training (LinkedIn Learning)

The links below are a collection of LinkedIn Learning video courses on the topics of remote work and virtual teams.

[Key Competencies for Working Remotely](#) - The skills and abilities that help you succeed in the virtual workplace. Topics include:

- Working remotely
- Communicating in virtual meetings
- Building trust in virtual teams
- Accountability in virtual teams
- Digital Body Language
- Conducting a voice call with a virtual team
- Time management while working from home
- Project work with remote teams

[Managing a Virtual Team](#) - Resources for managers leading teams remotely. Topics include:

- Leading virtual meetings
- Managing virtual teams
- Leading at a distance
- Keeping a virtual team connected
- Challenges of virtual collaboration
- Performance and virtual teams

[Virtual Platforms](#) - Tools and software to help you work remotely. Topics include:

- Learning BlueJeans Meetings
- Box.com Essential Training
- Microsoft Teams Essential Training

Appendix

Configuration Guides and Best Practices

PennNet Phone User Guides

The following user guides are available from ISC Networking and Telecommunications regarding PennNet Phone. These guides are maintained by ISC but are available here for quick reference. We have to be mindful of our limited capacity for call forwarding. If you do not need to answer live calls to accomplish your job, please see the PennNet Phone: Voicemail to Email guide for instructions for receiving your voicemail via email, which you can then respond to at your convenience.

1. Managing Your Settings

Settings such as voicemail passwords, call waiting, email notifications, etc., can be managed on the PennNet Phone Service (PPS) website. You will need your PennKey to access your phone's settings.

2. Polycom Phones

- Polycom 550 Quick Guide
- Polycom 550/650 End User Express Guide
- Polycom 550/650 LSP Express Guide
- Polycom Soundstation IP 6000 Quick Guide: Conference Room and Classroom Phone

3. Voice Mail

- Setting Up a New Mailbox for the First Time
- Features and Options
- Voice Mailbox Delivery Methods

4. Call Forwarding

All staff have access to configure call forwarding for their phone line. To do so, follow these instructions. Please note only forward calls if answering live calls is required for your job.

1. Log into the PennNet Phone System.

2. On the main menu under Personal Settings, select "Features and Voice Mail."

3. Under the PennNet Phone Settings menu you will find several options. The most common is "Call Forward All."

4. To configure this feature select the "on" radio button next to "Call Forward All." This will bring up the "Call Forward All Destination" box.

5. Type in the number you wish to forward your office line to using the format 9-XXX-XXX-XXXX for off-campus calls.

6. Click the "Submit" button on the bottom right of the menu.

7. Calls to your office line will now forward to the number you designated.

5. Hiding Your Private Phone Number When Using Call Forwarding

Google Voice is a free service you can use to hide your phone number while calls are forwarded from your office line. Here are two resources that show you how to do this:

- https://www.theverge.com/2019/4/23/18411138/google-voice-how-to-use-grandcentral-secondary-phone-number-voicemail-texts-sms

- https://www.youtube.com/watch?v=c8fS-RB7FYw

6. Printed Quick Guides
- Voice Mail Quick Start: A one-page reference that explains how to create your password, record your personal greeting and retrieve messages by email or phone.
- Voice Mail Quick Guide: A two-page reference that explains commonly used features such as how to record various greetings, available options during and after listening to messages, and power keys.
- Greetings and Passwords Quick Guide: Provides instructions on how to record greetings and name and how to change password.
- Transfer a Caller into Voice Mail: Provides instructions on how to transfer a caller into a voice mailbox to leave a message.
- Urgent Message Quick Guide: Provides instructions on how to mark a voice mail as urgent.
- Distribution List Quick Guide: Provides instructions on how to record and send a message to a distribution list.

7. Printed Full Guides
- Voice Mail Users Guide: A ten-page reference that describes to how to use all voice mail features as well as how to change (or manage) voice mail features (setting) in PPS.
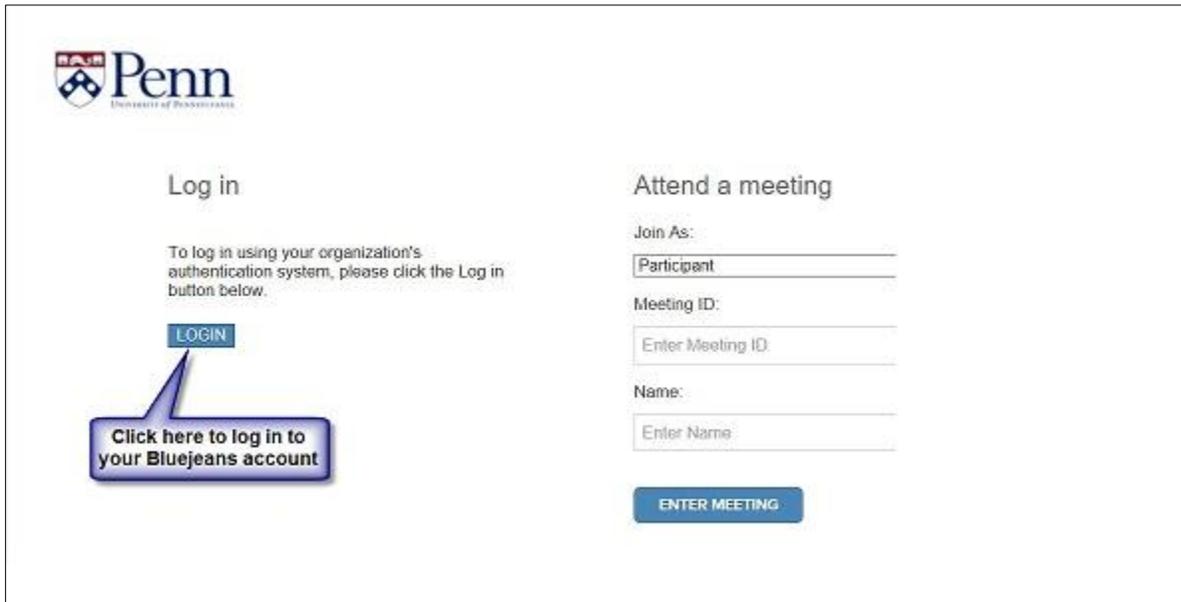
8. Other Features and Tips
- Buddies and Statuses: Use buddy lists to view the status of other PennNet Phone users. Requires PennKey.

BlueJeans

1. Logging In

To login to the BlueJeans public console, click here: http://meeting.upenn.edu.

From this page you may join a meeting as a Participant or Moderator, or access your private BlueJeans account by clicking the Login button as shown:

2. Main Console

Once logged in you are presented with the main console. Here, you will be able to view any upcoming meetings, or take the following actions by clicking the corresponding button:

- Schedule a Meeting
- Join a Meeting
- Start My Meeting

Each option is reviewed on the next page.
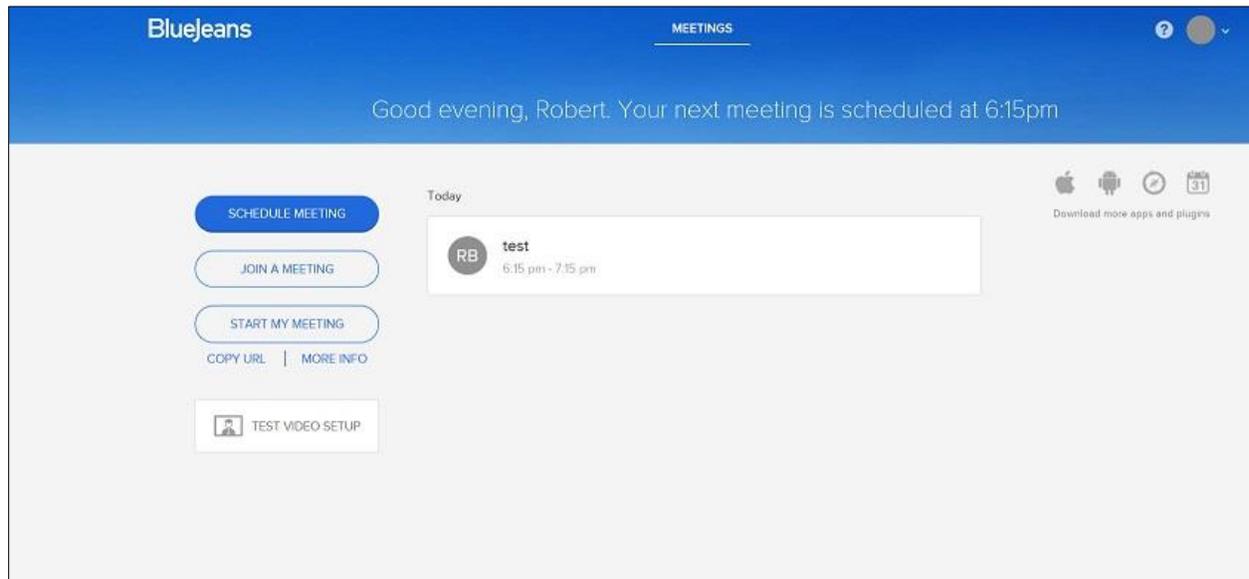
3. Schedule a Meeting

To schedule a new meeting

1. Click the SCHEDULE MEETING button
2. Add a title (optional)
3. Set the date and time
4. Invite Participants by adding their email addresses in a comma separated format
5. Click "SCHEDULE MEETING:" This will send the meeting invitation to all participants and automatically add it to your Outlook calendar.

Clicking "Advanced Options" allows you to choose whether to use "My Meeting ID." This ID is yours and is the same for every meeting you host. "My Meeting ID" also has a number of settings associated with it which can be changed by clicking "EDIT MY MEETING SETTINGS."

4. Join a Meeting

Participants may join a meeting by logging in to their BlueJeans console and clicking "Join a Meeting" as shown above, or by opening an email invitation and joining from there.

Regardless of the method, follow the onscreen prompts to enter the requested information. This will include some combination of the Meeting ID, Passcode, Dial-in number, and your Audio/Video capabilities.

If joining by email invitation, the menu below will appear once the Join a Meeting button is clicked. Choose either "I'm already on the phone" or "Use computer for audio" when read.
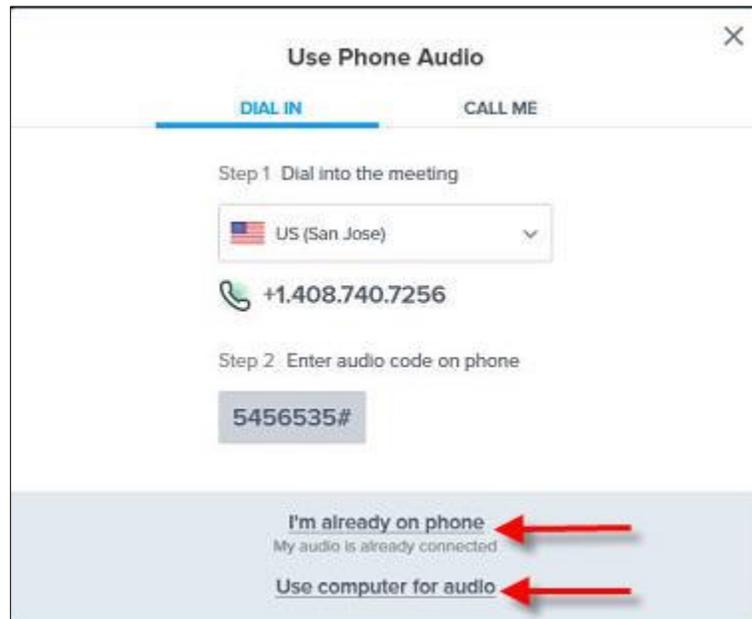
5. Start My Meeting

Log in to the BlueJeans console and click the "START MY MEETING" button. Next, you will be prompted to set your audio/video and dial-in options similar to the Join a Meeting options shown above.

When you enter the meeting, the following screen will be displayed. Options have been commented out where appropriate.
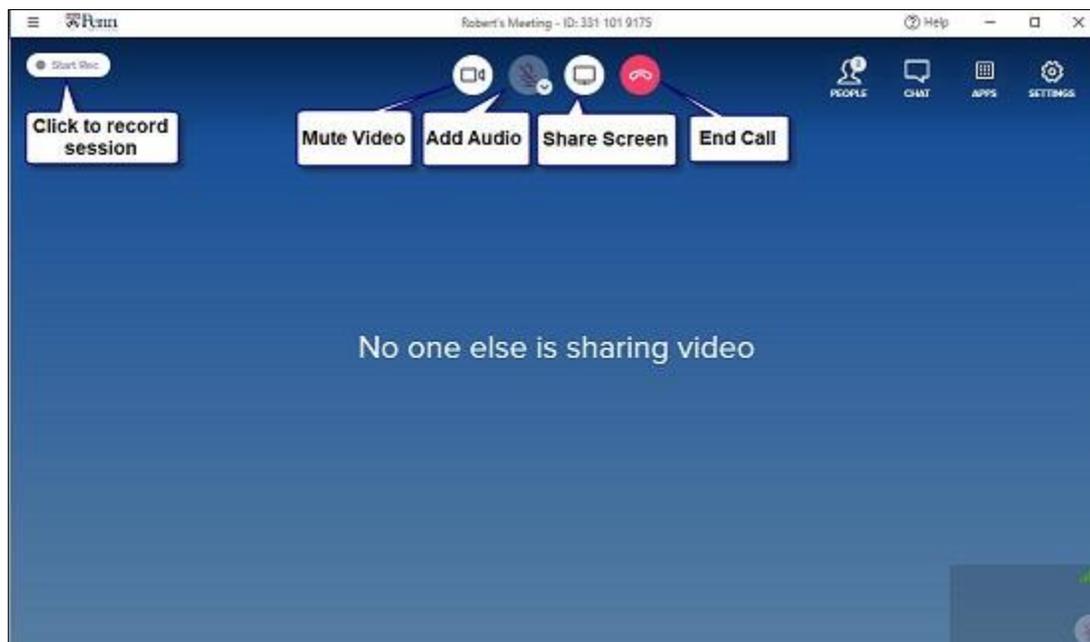
6. Help and Support

The overview provided above was just enough to get started. For further instruction, BlueJeans provides several tutorials covering all aspects of their product. Their support page can be accessed here: https://support.bluejeans.com/s/.

Perhaps the best way to learn how to use BlueJeans is to log in and try it out on your own. If you have any difficulty, your LSP is available to assist. There are also many other free sources of help online. A Google or Bing search will turn up several useful options.

Box Cloud Document Storage - Penn+Box

1. What Can I Use This For

Box is a cloud-based solution, so anything you place in your Box account will be accessible to you anywhere you have Internet access. The data you put in Box can also be made available on mobile devices and from within other applications.

- Use Box instead of a portable thumb drive when you need to take data to another location. Thumb drives can easily be lost, while with Box, you are not physically carrying anything that can be misplaced.

- Use Box to make files available at home. Instead of emailing files to yourself (or a personal email account), you can place a file you need to work on offsite in your Box account to work on outside the office. Please note: Remote Desktop is still the preferred method for accessing files offsite.

- Use Box to collaborate with other members of the Penn Community. For example, if you are working on a project that spans other departments and there is a need to share data, you can create a folder in your Box account and share that folder with anyone in the Penn Community that has an account.

- Place documents that you may need for a meeting in your Box account and access them at the meeting using your mobile device (phone, tablet, and laptop). This is a great way to reduce paper.

## 2. What Data Can I Store In Box

Non-confidential University data may be stored in your Box account. For a current list of appropriate data that may be stored in Box please see the University's Box Data Sensitivity and Usage Statement. If you have a need to store sensitive data, please contact your LSP for alternatives or additional controls that can be used with Box.

3. Security Precautions

Box has a few security precautions in place:

- Whenever you access your Box account from a new device, you will receive an email letting you know. If you receive a notification that your account was accessed and it wasn't you, you should notify your LSP immediately.

- PennKey authentication is used to access your Box account. However, you can also establish a secondary password to access your account from non-PennKey capable devices.

- Only certain third-party applications have been enabled and allowed to access your Box account. You can always access your account from a web browser. Additionally, you can access your account from the Box account that is available for most mobile devices (Android, iPad, iPhone, etc.). Some plugins allow you to edit Box documents directly from Microsoft Office applications.

- By default, sharing a link to a file or folder in your Box account is restricted to users that you specifically added as collaborators. In other words, it is harder to share your data via a simple link accidentally.

- Using Box Sync is NOT recommended - this is an application that keeps the contents of your Box account synced to your desktop. If you find a need for this, please contact your LSP so we can provide more details on how to exclude certain information from being synced to your desktop computers (home or work).

- Deleted items will be retained for 30 days for recovery.

- All access to Box data (both in transit and in storage at Box) is encrypted with high levels of encryption.
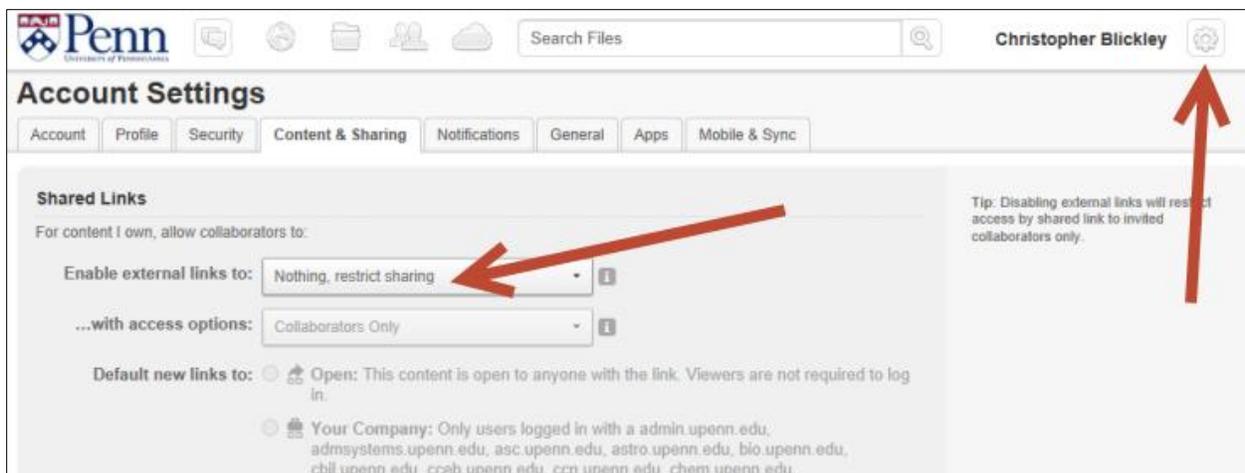
4. Creating Your Account

To create a Box account, you must do so from a web browser (you cannot create your account from a mobile device). Please follow the instructions in the FAQ section in the ISC website: How do I get a Penn+Box Account.

Once you have created your account, we highly recommend taking the following action:

1. Login to your Box account at upenn.box.com.

2. Access your account settings by clicking the "Gear" icon at the top of the screen next to your name (right side of the screen), then click "Account Settings."

3. Click the "Content and Sharing" tab.

4. In the option for "Enable External Links," change that option to "Nothing, restrict sharing." This sets your sharing options so that only individual users that you have established as collaborators on your folders can utilize "links" to those folders and files. This is a simple safeguard to prevent making a mistake while sharing your data with others.

5. At the bottom of the screen, set the option for "Automatically accept incoming collaboration invitations." This will make it easier to access content that is shared with you by automatically accepting the invitations.

5. More Information

More information can be obtained from ISC's Penn+Box site as well as the following:

- Box User Resources
- Box Knowledge Base
- Box Online Courses
- Penn+Box Frequently Asked Questions

Advice for Managing and Engaging Virtual Teams

This summary was created to highlight the major points and tips based on the articles and blog posts included earlier in this document.

Keeping workers engaged is a necessary part of leading a remote team. Without the ability to have organic conversations in the break room or at each other's cubicles, it takes a more concentrated effort for remote workers to be engaged. A lack of engagement can lead to isolation and loneliness, while completing meaningful work can help employees feel connected to the University's mission of increasing engagement and well-being. All employees are part of a team and value being included. Here are some ways managers can help keep employees engaged and productive.

1. Keep Communication in the Forefront

As with all things in business and relationships, communication is key. Keeping remote employees informed and in the loop reminds them not only that they're part of a larger organization, but also that the organization has a vested interest in their relationship. Communication on virtual teams is often less frequent and always less rich than face-to-face interactions which provide more contextual cues and information about emotional states and engagement level or lack thereof. That's why it's important to go the extra mile, add more opportunities, and make communication with remote employees a key initiative.

Leverage the best communication technologies. Developments in collaborative technologies, ranging from shared workspaces to multi-point video conferencing are unquestionably making virtual teaming easier. Review this document for instructions on how to set up call-forwarding and other *PennNet* phone capabilities, directions for using *Blue Jeans* for online meetings and conference calls, *Microsoft Teams* for chat and collaboration (although this technology varies across Schools and Centers), and an overview of *Penn+Box* usage.

Have regular meetings and videoconferences. Ideally, this would occur the same day and time each week. It also means establishing and sharing meeting agenda in advance, having clear agreements on communication protocols, and starting and finishing on time. Most laptops come with high-definition webcams built in, and Penn supported conferencing utilities like *Blue Jeans* and *Microsoft Teams* make video calls as easy as (if not easier than) actual phone calls. Seeing a friendly face makes a huge difference, and as mentioned before, there is a lot more information that can be communicated using video. Whether on the phone or via video, regularly scheduled check-ins are a proven method for maintaining alignment and they offer a chance to catch up after business is handled.

Create a charter. The charter should establish norms of behavior when participating in virtual meetings, such as limiting background noise and side conversations, talking clearly and at a reasonable pace, listening attentively and not dominating the conversation. The charter also should include guidelines on which communication modes to use in which circumstances, for example when to reply via email versus picking up the phone versus taking the time to create and share a document. An agreed-upon charter provides critical ground rules for how to work together in a virtual setting.

Follow tried and true virtual best practices. Some well-established best practices for running virtual meetings include using video, having some initial, informal check-in time (see "**virtual water-cooler**"

below), and assigning roles such as facilitator, time-keeper, or process moderator. Some experts suggest forbidding the use of the "mute" function and agreeing upon a way to penalize multi-taskers.

Use chat programs. When it comes to remote workers, chat programs are a blessing: free, faster and more casual than email, and conducive to group discussions. Chat makes it easy to keep in touch with people in and out of the office and levels the playing field by making distance a non-issue. Chat technology supported by Penn includes *Slack*, *Microsoft Teams,* as well as any other venues sanctioned by individual schools and centers.

Create a "virtual water cooler" and schedule a virtual lunch. The image of co-workers gathering around a water cooler is a metaphor for informal interactions that share information and reinforce social bonds. Absent explicit efforts to create a "virtual water cooler," team meetings can become very task-focused; this means important information may not be shared and team cohesion may weaken. One simple way to avoid this: start each meeting with a check-in, having each member take a couple of minutes to discuss what they are doing, what's going well and what's challenging. This helps to set the mood for people to listen and connect with each other. Another way to connect team members informally is to get all remote team-members on a conference call once a week to have lunch together.

2. Clarify and Track Commitments

Use a deliverables dashboard. When teams work remotely it's inherently more difficult to monitor work because there is no easy way to observe engagement and productivity. This can be partly addressed by carefully designing tasks and having regular status meetings. Beyond that, it helps to be explicit in getting team members to commit to define intermediate milestones and track their progress. One useful tool: a "deliverables dashboard" that is visible to all team members on whatever collaborative hub they are using. Provide access to such a dashboard through a shared drive or Box folder.

Don't forget the 1:1s. Leaders' one-to-one performance management and coaching interactions with their team members are a fundamental part of making any team effective. Ensure these interactions become a regular part of the virtual team rhythm, using them not only to check status and provide feedback, but to keep members connected to the leader's vision and to highlight their portion of what you are doing together.

Don't ignore the bigger picture. Remote workers don't have the same constant feed of information from supervisors coming by their desks or general updates through the cubicle telegraph. Giving remote employees continual access to the bigger picture that might include a larger goal or a project update, helps the remote worker understand how their role contributes to the University's overall success, resulting in a more engaged and purposeful employee.

3. Show Recognition and Appreciation

Be specific with praise and accomplishments. Employee recognition creates employee engagement, so it's vitally important for managers to provide feedback to their workers. However, this means more than sending general messages of thanks. Employees want to hear that their individual efforts are recognized and valued. When an employee takes initiative or exceeds expectations, supervisors should send them a message that specifically points out their accomplishment.

Recognition and appreciation can take different forms. Sometimes just calling out an individual's accomplishment in a meeting can be perceived as a reward. Making sure that certain individuals don't dominate a conversation can be a kind of appreciation. Intentionally keeping everyone abreast of both individual and team accomplishments is an important way of continuing to engage and motivate remote workers.

Be consistent. As you begin to make changes to the way you implement rewards and recognition among your remote workforce, remember to stay consistent. When you construct a rewards system that produces results, you can begin reinforcing it as a staple of your team's culture. You will become a modern organization that values participation and connection but promotes worker independence and autonomy from the traditional workplace setting.

4. Summary

All these suggestions are designed to strengthen the bond between employers and remote employees and to strengthen engagement. The key to success is communication: if you can learn what needs and concerns remote employees have, you have a basic framework for addressing those issues. And if you can gain a sense of how employees are feeling, you can track that sentiment against your efforts to see if what you're doing is working.

Employee Assistance Program (EAP) Resources

Penn's EAP provides eligible faculty and staff, and their families, access to free, confidential, 24/7 counseling and referral services for personal and professional life issues from any location.

EAP services are available by phone, email, webchat, and video sessions. Face-to-face sessions will be available when the Philadelphia region returns to normal business hours. Health Advocate EAP counselors will connect you with the right experts at the right time: masters level clinicians, work/life specialists, medical bill negotiators, and financial and legal professionals. In addition, Health Advocate offers multi-language capabilities.

Counseling is free for you and your immediate family members—your spouse, dependent children, and your parents and parents-in-law.

Each family member can receive up to eight free counseling sessions per distinct problem, per fiscal year, from the time of your initial intake. If you exceed this limit, Health Advocate will make every effort to coordinate services with your existing health insurance. You may be referred to your insurance plan for services, where applicable, before your eight sessions are completed if it is determined that your clinical needs require treatment beyond the short-term scope of EAP.

Contact

Call: 1-866-799-2329

Email: EAPinfo@healthadvocate.com

Visit: www.healthadvocate.com/upenn