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Participatory Practice and South African Collections Remote Viewing Guidance

Remote Viewing: Facilitation and technical guidance

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Purpose

This guidance aims to provide a foundation from which you can build a facilitated approach to remote viewing; this guidance will also help build confidence in how to approach the technological aspects of running a remote viewing session.

This document does not cover the specifics of object handling and conditions under which the objects are viewed, these specifics should be overseen by the appropriate people within the collecting organisation. Throughout the document the word 'object' is used as shorthand for an accessioned item of any kind, this could be cultural or natural in nature (specimen).

Throughout the document 'you' will be used to denote the person/s leading and organising the remote viewing. This could include several roles and individuals.

Throughout the document *viewers*, or *those viewing*, is used to denote those actively participating in the remote viewing. This should not be seen as a passive role.

What is a remote viewing and why are they used?

Museums can use digital remote viewings to consult with communities on collections when in-person visits are not possible or practical. This might be due to factors such as distance, time, cost, or carbon emissions. Remote viewings can also be used to prepare for, or follow up from, an in-person visit. To provide the greatest amount of guidance, the suggestions in this document assume that an in-person visit has not taken place prior to the viewing.

Remote viewings involve showing collection items and consulting communities of interest about these items via a virtual meeting.

Remote viewings have great potential for knowledge sharing, cultural exchange and relationship building between museums and communities of origin and interest. They can prove challenging and require careful preparation, patience, and trust.

Remote viewings can produce a great deal of high-quality information about objects. They can reduce and focus research time considerably. They can form and deepen ongoing connections. They can provide advice and guidance on how to store, care for, and exhibit (or not) objects.

How to use this guidance

This document is designed to support museums in facilitating a remote viewing. Whilst a remote viewing could be between professionals, and across museum partnerships, this

guidance is focused on working with communities and community groups, although many of the principles and practices are the same.

In its later stages this document will talk about the technicalities (the 'kit') of remote viewing, as well as provide advice around a remote viewing set-up. This advice will focus on low-tech solutions and agile options which could be adopted by many organisations with access to everyday equipment, available at relatively low cost.

The majority of the document focuses on the facilitated nature of a remote viewing. Regardless of the objects being viewed, or the community and museum involved, the most important aspect is to appropriately facilitate the experience between all the individuals involved.

The technology does have to work – but how everyone interacts with each other, how all have the opportunity to offer reflections, and how findings are responded to, is ultimately of the greatest importance. Care in this area gives the greatest possibility for the remote viewing being a positive experience and beneficial knowledge exchange for all.

The guidance document asks many questions – these questions are designed to focus activity at every stage of the viewing, and the answers may change depending on circumstance. These questions are captured as checklists at the end. These checklists are designed to support better practice – all questions should be considered within the context of the viewing you are designing and facilitating.

Each of the following sections has been split into *social* and *practical* aspects, with the social given prominence. In this context 'social' relates to how all parties interact and what we might want to know; 'practical' relates to equipment, operational, and physical aspects of the viewing.

Before the viewing

Take time, take care, and be pragmatic in your expectations or, as a participant in a knowledge exchange event eloquently said: *"move at the speed of trust"*.

Social

Know why you are holding a remote viewing

Ask yourself some key questions:

- Where did the impetus come from - the museum or the community?
- Do you want to share or do you want to learn?
Both are likely to happen, but there can be different preparations and considerations for each aspect.
- What do you want to know?
Eg, specifics about an item (such as stitch-work or types of tools used to produce an item) or broader social and cultural use of an item.
- Do you know what the viewers are most interested in?
- Are your objects alongside labels or collections data descriptions which contain contested, outdated, or offensive terms? What actions will you take in relation to these?

- What terms and language do the group use? What terms and language would they prefer you used – both in relation to heritage, countries of origin, and any specific objects? If there is any doubt, check with the group. *Note that some words like ‘object’ can seem inappropriate when dealing with a remote viewing – words like ‘belongings’ may be more appropriate – but this may be different in each instance.
- What do the viewers want to see/ do/ respond to?
If the viewers belong to any sort of defined group, have you considered that their knowledge may not be homogenous, and how will you assess the various reflections you receive, especially if they appear to sound contradictory?

If the impetus is from the museum, with a desire to learn more about a series of objects – consider carefully how you will work with the community to provide them with the best experience.

It is assumed throughout this document that you are working with a group with which you have had some previous contact. It would not be recommended to have a remote viewing with any group as your initial contact. Some previous contact and context would be expected. It is not expected that the whole group, if large, will have met with you and your organisation ahead of time, just that *some contact and context* will have been established.

In preparation for the viewing, it is suggested that you will have sent out information on the items you might be viewing. This will help to then further narrow down the list to ones to which the group has the strongest responses. This interaction may not involve the whole group but could be a trusted contact who you have confidence in sharing information with the group more broadly.

When forming object lists be aware of your power in this situation and ensure you support communities to lead on object selection. It is understandable that self-censorship can neglect to list objects which are more ‘difficult’ whether due to their materiality or their history.

Where possible, supply images (even just reference images) as well as object information. Where feasible, include information such as size, texture, how items are stored, and note what items are stored together.

You will have asked (even if you feel secure in your own assessment of the situation) if there are any objects which should not be viewed (by anyone) for any reason, or not to particular members of the group. For example, some objects may only be appropriately shown to one sex; or some objects may have ritual or religious significance and would only be viewed by individuals holding a specific role or status within their community or faith. This may also apply to how objects may or may not be handled.

You will have checked if any objects need specific sensitivities to be taken into account. Are there items which are geographically or culturally sensitive? You may be able to have these as part of a remote viewing, but it is good practice to be able to say what item you are going to view next, to give people time to know what they are about to see.

Are there any cultural considerations you need to take into account? For example, should there be any spiritual or religious recitations requested prior to viewing the objects (and who should lead this)? Should objects be covered prior to viewing - if so, with what materials?

You will have considered the emotional and psychological safety of all those taking part in the viewing. Objects can (and do) provoke strong emotions. Have some mechanisms ready to support all those taking part. It might be helpful to mention that at the start – perhaps by letting everyone know it can be ok to step away and take a moment as needed.

Do you intend to record the session - if so, why? Is this to be used as a reference to check notes before destruction? Is the recording for the viewing community so it can be shared with people not present at the time? Learn how to record for the medium you're using. Some programmes may only record one 'feed' and may not capture all activity.

Recording should only be used with prior agreement, and within clear parameters for all parties. Recording may inhibit responses unless strong rapport already exists between all those taking part.

Once you have sent out a suggested list (most likely formed with the group initially) you will receive responses. Leave enough time for this to happen, and to action what you receive. The group may have different interests and knowledges from your expectations. You may be asked for more information (and even more objects).

If the impetus is from the community, you may need time to gather and research the information that is most pertinent to their interests. You may need to be clear about what is possible in the time. Be clear, be honest, and discuss where they want to focus their time to best effect. If there are multiple areas of interest, it could be beneficial to have multiple viewings (if capacity allows). If the impetus is about potential return of objects, include any related policies which may support the group.

Always be realistic about what is possible in the time. It is better to have two shorter viewings than one very long and wide-ranging session. Focus on the initial (agreed) aims and adjust accordingly. You are likely to view fewer specific objects than you imagine. This is even more likely if you are interacting with a large group remotely.

Are you in an organisation which will need time to organise object movements between locations? Does this activity involve other teams, such as conservation or collection services? Do those teams have capacity to support the activity within your planned timeframe?

Be realistic about what you can show remotely – whether due to condition, mixing types of materials in one viewing, availability of access, or any other factor. This can be particularly pertinent if the impetus is from a community. Despite a desire to meet their requests, being transparent about why some objects might not be possible to view is reasonable. Being honest about any limitations can build more trust than suggesting something could be possible, then not being able to deliver. See if there are other mechanisms to assist viewing; can additional images/ scans be provided, can further descriptions be provided?

When considering the information that will be gathered during the viewing, have you set realistic expectations for how that information will be used? Is this about a research project, will object data records be updated formally (or informally)? Will information about objects provided during the viewing be publicly available? How will the source of the information be presented, if any information is being logged (group/ individual/ anonymous/ unlisted)?

Ensure you set-up a Zoom (or similar) meeting and ensure all those who need it have the link. Ensure any time listed is clearly expressed in all relevant time zones.

Do you have an agreed process for what follow-up will look like after the viewing, and does this seem to meet the expressed - or expected - needs of the group?

Practical

Know your timeline: how long do you need to plan, prepare, and implement this session? Will the community group respond to your timeline as you expect? Do you have enough time to work flexibly if community availability changes?

How many objects are expected to be viewed, are you viewing them as groups or individually? Have you got written information you can send through so those remotely, and those in the room, have the same information available. Are you able to augment or simplify the information if any of the language seems dense or archaic?

At a recent knowledge exchange, multiple participants had positive experiences of viewing a single object at a time during a viewing. This focused the viewer's responses and provided a calm environment in which to consider what was being seen, and how viewers could respond. It can be helpful to have one person narrating in relation to the object, and another communicating directly with the viewers.

How long will the session be? Remote viewing can be difficult to watch at times (some people can feel seasick depending on the type of motion) so shorter sessions with breaks might be better. 90 minutes would be the maximum suggested without any significant break.

How many people do you need in the room to make the session work. This depends on the number of viewers. One-to-one is entirely possible (but tricky). As soon as the viewing group is larger, then two to three (or more) people would be recommended to run the viewing.

Who is monitoring the screen, checking what can be seen is the right camera? Who is monitoring any questions? Who is taking notes? You could record the session - this can inhibit responses and often doesn't capture everything adequately, so is not recommended as your only form of notetaking.

How much space do you need to lay out the objects, set up the cameras, and have any screens/ computer access? Do you have enough space in your stores for this, or do you need to find another room?

Does your chosen room have good internet access? Is it quiet enough for the viewing to take place? Do you have enough (appropriate) light for the objects you are going to show.

Would it be helpful to share a short film in advance, showing where the viewing will take place, to help locate the viewing for the viewers?

Have you charged and tested all the equipment needed?

Have you tested the wi-fi/ internet connection in the location you will be using, have you checked it is suitable for a live video link?

If the viewing livestream fails for any reason, what is your back-up method of communication to explain/ ask what is happening? Have another method ready – perhaps via mobile phone.

If there is capacity, a 'tech-check' a couple of days prior can be incredibly helpful. This is when a test session is joined by both parties (can be as few as one viewer and one host) to check that the connection works between locations, and that the expected equipment for viewers is providing adequate pictures and sound.

What do the viewers need to know in advance to make this a positive experience?

Whilst you cannot control the viewers choices, you can also make recommendations which will improve their viewing experience.

Are there any accessibility issues? Will closed captions need to be turned on (this will reduce the free space available for object viewing on the screen)? Do the viewers have access to appropriate speakers (not just through a laptop)? Is there a large screen (or multiple screens) that the viewers can use?

Will there be any translation used – whether informal across the group, or a translator present? If there is, you will need to attempt to use short sentences and pause to give time for the translation to occur.

The group is best situated all together in one place to be able to reflect collectively. However, all joining individually, remotely, could also be possible, but putting in place clear rules for hand-raising and 'who speaks when' would be essential to prevent too many overlapping voices.



Remote viewing undertaken as part of Reveal & Connect: Participatory Practice and South African Collections.

At the viewing

Social

Setting the scene

Even if there has been extensive contact previously, always take time to set the scene to all those participating. Outline what you expect to show and do and check that this meets the expectations of the group. If there are items you cannot show – explain why, and state what other measures have been taken.

As part of the introductions, introduce the space – show the room/area you are in. Those viewing are unlikely to be familiar with your surroundings. Context helps to support people to feel comfortable.

Check that any materials provided in advance are accessible and present.

Introduce everyone – names and a small amount of context can be helpful. If several people are needed to run the viewing, make it clear why everyone is there and what their role is for the session. For example, this is X, they will be running the Zoom (or similar) account. This is Y, they will be using the hand-held microscope. This is Z, they will be capturing notes. This not only helps to explain but also helps to manage expectations. Curatorial roles may be expected to share in a reciprocity of information, and unexplained

silence could be perceived as a lack of engagement or someone not wanting to be present at the viewing.

Encourage the group to do similarly, with everyone introducing themselves as is suitable to them.

Understand the cultural protocols. Some individuals from a community may, for example, not be able to communicate with elders effectively because of their status (gender/ age, etc). Appreciate that in some areas there are many different tribes or cultures represented, knowledge and stature could vary greatly across the group with which you are communicating. You will also need to be aware of how your own social identity (race/ gender/ class/ ability/ education/ geography and other factors) shapes your view and how you relate and interact with others within the context of the viewing (this can be referred to as your *positionality*).

If it has been agreed to view sensitive items, be clear who will or will not be present during that portion of the viewing. When that section occurs clearly state who is leaving the space. It might be possible to agree in advance when this section will happen (if it is part of your viewing).

If appropriate, check the language and terminology previously agreed upon.

Introduce your location, where you are in the room (if it's a larger space), where that room is based, and where that is geographically.

Check with the group that they are comfortable with the people present and understand why everyone is there.

Outline the purpose of the viewing, as agreed, and any context for a wider project if appropriate.

Outline that everyone reacts personally during a viewing and if anyone needs to step away for a moment, they should feel free to do so. You could perhaps note that the viewing will only pause on request, otherwise it is understood that individuals can take a moment and return when suits them. This prevents unnecessary stop/ starts and gives space to step away without drawing further attention to anyone's potential discomfort. You may choose to agree with your main contact with the group in advance what is preferable.

Know that even as a subject specialist you may hear information which challenges your understanding, or current thinking, in relation to an object or the context for an object. For a facilitated approach, it is important to hold all information as equally valid during the viewing. Acknowledge what you hear and thank participants for their input as the session progresses.

During a facilitated viewing where you are gathering information, it is not necessary to agree, or feel you should validate, anything you hear – you only need to acknowledge.

Some groups may be surprised by the things that museums may not know about objects and provenance. Be prepared for how you will describe gaps in knowledge. Acknowledge that information held by museums also needs to be queried.

When considering the information gathered, have you set realistic expectations for how that information will be used? Is this about a research project, is a final publication expected? Will

object data records be updated formally (or informally)? Will information about objects provided during the viewing be publicly available – in any form? How will participants and knowledge sharers be acknowledged (or not) in any outputs?

Be aware during the viewing that within any group some voices may be louder or more dominant than others. Whilst you cannot (nor should not) 'control' a remote group, you can encourage a variety of voices to contribute – and be clear that different perspectives and knowledges around the items/ their use are all welcomed.

Practical

If the area you are using could be used by others, put signs on the doors that explain what you are doing to prevent interruption.

Can everyone see the screen and is the room comfortable for those present? (Within the limitations of what is possible within their spaces.)

As well as showing the room, show the technical set-up to the viewers. This will help them to ask questions, direct specific views, and know the limitations you are working within. Most camera views will be relatively fixed – but a roving camera or close-up (digital microscope) can also be used. These views can be changed between items.

Have you set expectations accurately for what you will do with the data provided? How you will capture it, use it, store it, refer to it, and acknowledge the data providers? Ensure the note taker is aware of this in advance and, if possible, has a list of (likely) participants. Comments shared back to the group are unlikely to always be ascribed to a person, or the correct person. Are viewers comfortable with their comments being shared collectively?

You may need to provide different ways to provide thoughts/ comments/ feedback. Is there a chat function, is it live and available to all (who has control of the keyboard from the viewing group)? Do you want to run a separate area for questions/ comments through something such as Slido? Do you have a live note taker who is only focused on what they can hear? This is extremely beneficial – but also highest capacity.

As part of the initial process, you will be able to check that participants can see and hear clearly. You will also be able to assess if you too can see and hear them as expected. Poor sound quality for all parties can be an issue, particularly as enthusiasm and amount of input increases.

Turning on closed captions can also assist with making poor sound more comprehensible. Do note that automated captions will make mistakes, and technical terms, or terms not in English (if using English as the main language) are likely to be poorly transcribed.

Ideally, during the viewing, move slowly and carefully between objects and different camera angles. Rapid movement can make the viewer/s feel a little motion sick. This can be tricky in reality - when there are requests to show a related object, a different object, a different perspective, etc. Be mindful that responsiveness needs to be tempered by what will benefit the whole group. A note taker might be able to highlight what has been asked for, and then choices can be made.

Have clear roles and know who the main 'voice' is, this will give greater clarity for the viewers. A microphone can help to support this clarity, with whomever has the microphone being the expected speaker for that period of time.

When starting to view objects, show the viewers what is where, work through the list as detailed in previous communication. This helps to give structure, stick to planned timings, and use the viewer's time appropriately. If many people are talking it may be necessary to ask for a summary of the conversation to be repeated.

Share knowledge about how the objects are stored, packed, how they inter-relate to each other. Where possible, during handling you could also describe the weight and feel of the object. You may want to consider texture, temperature (is the object cold to the touch), any scent that might be present, etc. You may be asked to touch an item/s without gloves. Know how you will respond in these instances, particularly if a community may consider the object as 'theirs'.

Consider items to help show scale. If a measure is to hand, this may be helpful, but often just putting a hand in frame can give viewers an accurate enough indication of scale.

When viewing a detail of an item (via camera or microscope) it can be useful to show the hands holding the microscope and the wider view of the object, then viewers can clearly tell what part of the object is being examined in more detail.

Describe what has been shared in written form, but also any additional details the group might find helpful. The expectations of the session will have been shared in advance, clearly expand on that – whether sharing your knowledge, or asking for their reflections and experience of similar items.

Any information can be captured on pre-prepared sheets. Using a pre-prepared table can be helpful, but - if using Excel or similar - a large print out would be recommended to provide space for what can be significant annotation.

Take time to pause, to react to what you are hearing, to listen, and to consider any follow-up questions.

You may have to ask a group to repeat and clarify information. If there is someone who can also ask these questions in a chat function, it can help to refine responses.

Attempt to keep to time, the objects you are likely to be viewing may have been chosen by the group and there could be significant interest in items at both the start and end of any list.

There is no hard and fast rule for the timing of these sessions, and it will depend on pre-agreed aspects. In a recent session between colleagues working on a project, 25 items were planned and ultimately 21 were viewed in a two-hour session. A smaller number of items would be more likely when working with a community.

As with any online session, it is recommended that break/s are scheduled for the comfort of all participants.

It is likely that during the session, enthusiasm for the process and objects will increase. This can lead to additional asks for more objects, related objects, connected objects. If you are in a store with access to these it can be tempting to add in more objects. It is recommended

that, unless working with a small group (and a large amount of time), finding more objects can take too much time, detract from the original agreed aims, and be found confusing by those viewing. Other ideas can be noted and followed up as necessary.

After the viewing

Social

How do you feel? Did anything come up which needs to be followed up from an emotional and psychological perspective? Museums (and the individuals within them) can feel like both *perpetrator of past traumas, and doctor providing healing*. Acknowledging this position and accepting that these feelings may be present may be an important part of the process.

Are there resources for the viewers, or the team involved from the museum, that could be beneficially shared? Ensure all parties have space for reflection time; it can be an overwhelming process with mixed and intense emotions. A debrief (can be an email check-in) questionnaire a day or so later, really helps everyone to feel better connected.

Are there reflections you want to capture about the process, things that went well, things that were unexpected, things you would want to change?

Have the relationships with the community involved changed? If so, how?

Does your main/ lead contact within the community of viewers have the resources they need to address any issues which arose?

How do you want, or need, to follow-up with the group or individuals? Do you have an agreed process for this?

What are the next steps for the relationship with the group?

How did you express your thanks for the time, effort, and emotional labour expended?

Practical

How will you best follow the previously agreed process with the group? A detailed follow-up which checks what was noted during the viewing, and corroborates any information, is an essential part of the process.

Who is collating/ making sense of the information captured? How will it be shared? Will it happen within the expected timeframe? There can be significantly more information captured than expected, and some information can necessitate further research.

What questions are there from the session that you want to explore more?

Did you learn anything unexpected?

What additional information do you need to provide to the group?

If information is being used (research/ data enhancement/ publication, etc) how is that being shared, and with whom? Are drafts being provided? Is the group able to edit/ amend? Who

has final sign-off around information from the process? Do you, or other colleagues, have the capacity to update object records appropriately?

If you have received information which appears to be contradictory, how will you capture/express that information?

How, and for what time-period, will any information (recording/ transcript/ notes) be stored, and where?

What is your next planned interaction with the group?

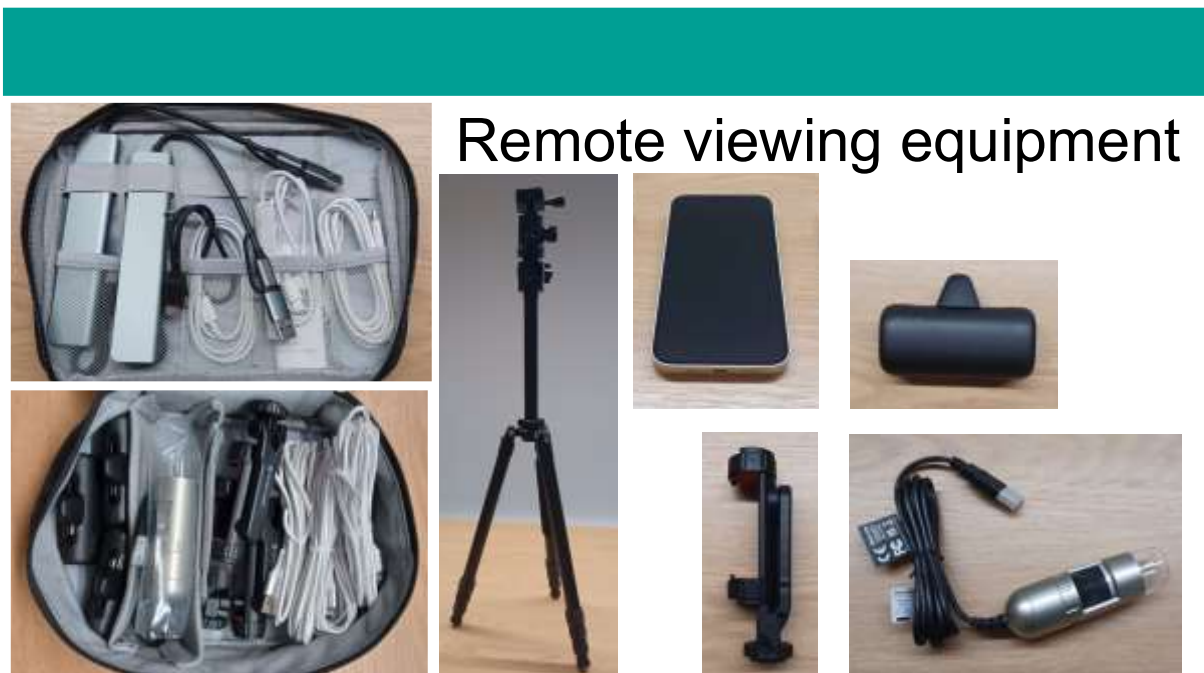
Are you enabling the group to evaluate the experience, and if so, how? Will any evaluation be anonymous? How will you use the evaluation?

Are there items that need to be stored/ treated differently based on advice from the community? How will this be actioned?

Technical Setup

Not every viewing will need all items. A smaller group with clear sound and access to a larger screen will need fewer technical support items than a large group.

All equipment for all parties should be checked and charged in advance.



Remote viewing equipment

Examples of remote viewing equipment (clockwise from bottom left): Remote microscope and equipment in a pouch, equipment charging cables, tripod, mobile phone, battery-pack, digital microscope, and mobile phone adaptor for use with a tripod.

Host

Essential equipment

- Strong Wi-Fi signal
For example, Zoom official minimum bandwidth requirements (2026) are:
 - 1-on-1 video calls: 600 Kbps (0.6 Mbps) up and down
 - Group video calls: 1.0 Mbps / 800 Kbps (up/down) for standard quality
 - 720p HD video: 2.6 Mbps down / 1.8 Mbps up
 - 1080p HD video: 3.8 Mbps down / 3.0 Mbps up.
- Zoom Account (Zoom has been best option for majority of participants, and we will refer to Zoom throughout. However, be familiar with what might suit your viewers best – Teams, Zoom, and Google Meet are all likely to have appropriate capabilities)
- 3 phones with portable battery packs (second-hand iPhones were used successfully)
- 3 tripods – varying sizes for floor standing and desk-top use
- 3 phone holders for tripods
- 1 laptop with Zoom installed – a specific laptop for remote viewing is not needed, we recommend using a team member's laptop (with all notifications switched off) for the duration of the session.

Further recommended equipment

- 1 phone with a good camera (this can be helpful for better image quality shots if needed)
- 1 digital microscope and USB cable (a second laptop with zoom installed to support this item is helpful for presenting multiple views)
- Bluetooth microphone
- Portable speaker
- Extra-long power leads for phones
- Variable friction arm for tripod
- Extension cord
- USB hub/ splitter for use with computer if needed
- If other languages are being used, is Google Translate available to help support communication and understanding? (Not recommended as a replacement for a translator, only to support additional understanding).

Viewer

Essential equipment

- Strong and stable Wi-Fi connection or cabled internet connection
- Laptop – with charger and access to power.

Clarity on who controls the laptop

Further participant recommended

- Large additional screen (or multiple screens)
- Zoom installed (for best experience) rather than through web
- Speakers - charged if Bluetooth - or powered.

Setting up the host equipment

All equipment should be stored in one location as a 'kit' if using regularly. Otherwise maintain a list of what is needed and where to source it as needed.

Prior to setup, charge all items and update any software and Zoom requirements on laptop and phones.

Outline instructions:

- Attach the iPhone holders to the tripods and set them up on the table where you would like your different angles to be. These will be your static cameras providing a view of the space on the Zoom call.
- Open the Zoom call on the laptop. Have the camera and mic on.
- Turn on the iPhones. Ensure you know the relevant passcodes.
- Open Zoom but do not login to an account. To join the meeting type in the Zoom meeting ID and passcode. Make sure the Zoom microphones are muted and the output volume on the iPhones is turned down/ muted.
- Place the iPhones into the tripod holders. If their batteries get low, you can plug in a portable battery pack.
- You have two options for the close-up views of objects. You can use both or just one:
 - Use a handheld phone camera. Join Zoom on your phone and make sure the camera is on, but all sound input and output is muted. Move the phone as directed by the participants on the Zoom call.
 - Use a digital microscope. You need to plug this into a separate laptop**. Open the Zoom call on the laptop, ensuring camera is on but all sound is muted (mic off and laptop volume down). Zoom should pick up that you are using an external camera but if not change the Zoom camera settings to select the microscope. Move as directed by the participants on the Zoom call.

** You can use the digital microscope even if you only have one laptop available during the Zoom call, but you will not be able to show both the laptop camera (with you on it) and the digital microscope at the same time. If you only have one laptop available and want to use the microscope, you can alternate between the laptop camera and the digital microscope by choosing the right camera option on Zoom.

- If using additional speakers, attach them to lead computer and choose this as your output.
- If using a microphone, connect this to the lead computer and choose this as your input microphone for Zoom.
- If using a variable friction arm, this can be set up with one of the tripods and allows a degree of smooth motion if viewing an item for a prolonged period, and with more detail.

Additional advice

Setting up the cameras: When using multiple cameras, you can give the viewers an overview of the room (showing around the table); the whole tabletop; and a specified item viewing area.

When setting up consider usual health and safety aspects, giving enough room for people present to move safely around the space and with any wires taped or weighted down as necessary. Ensure your power sources are appropriate, and the light sources are suitable, for the work being undertaken.

A good digital camera can seem like an excellent addition, but some versions have built in microphones which can be hard to switch off. This can be complicated if Zoom (or similar) then tries to repeatedly connect to that microphone. Only use if appropriate technical skills will be available in the room.

Zoom/ meeting application: Ensure that whoever is leading on the Zoom functionality has fully familiarised themselves with the main controls needed, such as spotlighting certain cameras, changing camera or microphone input, and using the chat function effectively.

Other technical elements to consider

Should you, or a partner organisation (such as a research institution/ university), have access to other digital tools to produce any of the following: High-resolution images, 3D scans, multiple image 'spins', LiDAR scans (of objects or locations), know that these can be exceptionally helpful prior to a viewing to help provide supplementary information. They can also (where available) be shared with a community in advance to help confirm which objects are of greatest interest.

Short description of a remote viewing

Museums can use digital remote viewings to consult with communities on collections when in-person visits are not possible or practical. This might be due to factors such as distance, time, cost, or carbon emissions. Remote viewings can also be used to prepare for, or follow up on, an in-person visit.

Remote viewings involve showing collection items and consulting communities of interest about these items via a virtual meeting.

Remote viewings have great potential for knowledge sharing, cultural exchange, and relationship building between museums and communities of origin and interest.

Further training and advice

A remote viewing kit will be available for museums across Scotland to borrow from National Museums Scotland. Participants on our Remote Viewing Facilitation training (due in 2027) will have access to the kit when training has been completed as part of our National Training Programme.

Additional training to consider includes trauma informed practice, safer spaces approaches, and deepening understanding of equalities and inclusion work for diverse audiences. At all times listen to your community partners and show sensitivity to their requests.

Further reading

[Mootookakio'ssin: Distant Awareness](#)

[Making the Unaccountable Accountable](#)

[Questioning care for things and their people](#)

[Collections Management as Critical Museum Practice | UCL Press](#)

[Rethinking Relationships | Pitt Rivers Museum](#)

Why this document exists

With thanks to Museums Galleries Scotland who funded the Reveal and Connect legacy project *Reveal and Connect: Participatory Practice and South African Collections*. This project involved trialling remote viewing with South African objects in Scottish collections and working with Iziko Museums of South Africa. The project explored working with scalable, remote viewing technology and supporting practice and improved confidence in remote viewing with partners across Scotland.

As a legacy of this work, this guidance was developed and training was made possible as part of the National Training Programme from National Museums Scotland. Once this training has been undertaken, museums across Scotland will be able to borrow a remote viewing kit to further develop their own remote viewings with partners world-wide.

To read more about the wider Reveal and Connect project and legacies, please go to our webpage where you can learn more about the projects and our consortium partners: [African and Caribbean Collections in Scottish Museums | National Museums Scotland](#).

To find out more about National Museums Scotland work across Scotland, please go to our [Linktree](#).

With thanks to

All colleagues, partners, commentators, and participants who have shared their time and expertise to help inform this guidance. The trials, errors, challenges, mishaps, and confusion that have occurred to us all from time to time have helped to inform better guidance, better practice, and better experiences for all concerned.

With good planning and clear roles in place, a remote viewing can be extremely rewarding for all parties. Objects can be shared, knowledge can be exchanged, and relationships can be deepened. A small amount of planning and preparation enables viewings which could not take place otherwise. These can provide an incredible way to link objects, their communities, their stories, and our work together.

Appendices

A Checklists: Before the viewing

BEFORE THE VIEWING	NOTES TO SUPPORT THE VIEWING
Where did the impetus come from?	
Do you want to share or to learn?	
What do you want to know?	
What are your viewers most interested in?	
Are your objects alongside labels or collections data descriptions which contain contested, outdated or offensive terms? What actions will you take in relation to these?	
What terms and language do the group use? What terms and language would they prefer you used in relation to heritage, countries of origin, and any specific objects?	
What do the viewers want to see/ do/ respond to?	
Have you compiled a list with object information in preparation for the viewing?	
Have you shared this list?	
Have you refined your aims based on response?	
Have you informed necessary colleagues about the viewing?	
Have you supplied images in advance?	
Have you checked what should or could be viewed by whom (considering appropriate sensitivities)?	
Have you considered the emotional and psychological safety of all those taking part?	
Are you planning to record the session, is this agreed and planned?	
Have you planned any additional research time?	

BEFORE THE VIEWING	NOTES TO SUPPORT THE VIEWING
Have you agreed appropriate object moves between locations if necessary?	
Do you know how you will use the information you will gather during the viewing?	
Have you set up your remote viewing session (Zoom, Teams, Google Meet, etc)?	
Have you shared the time clearly across different time zones?	
Do you have a process for follow-up agreed?	
Do you have a timeline?	
How many objects will be viewed, in what order, and in groups or individually?	
How long will the session last?	
Do you have access to all the people you need for all actions?	
Does your location have adequate internet access? Have you tested it?	
Have you sent information about your location in advance?	
Have you charged and tested the equipment?	
Do you have a back-up means of communication?	
Have you checked accessibility needs?	
Do the viewers have access to appropriate equipment?	
Is any translation needed or planned?	

B Checklists: At the viewing

AT THE VIEWING	NOTES TO SUPPORT THE VIEWING
How will you set the scene?	
Are you prepared to describe what you will and will not show?	
Have you got a description of the space ready?	
Check the materials provided in advance are available.	
Is everyone present clear on their role?	
Are the viewers prepared to introduce themselves?	
Are you aware of cultural protocols in the group?	
Check your awareness of your own social identity and how this shapes your view.	
Do you have protocols in place for any sensitive items which you have agreed to view?	
Check the group is comfortable with those present and the viewing as outlined.	
Ensure everyone knows they can step away from the viewing if they feel the need.	
Be prepared for your knowledge and/or understanding to be tested.	
Give space for museum knowledge to be tested.	
Outline how the information will be used.	
Be prepared to enable a range of voices within a group to respond.	
Have you made sure you will not be disturbed?	
Can everyone who needs to, see the screen and hear clearly?	
Have you made the viewers familiar with the equipment?	
Is there clarity on how you will capture and use any	

AT THE VIEWING	NOTES TO SUPPORT THE VIEWING
comments and data you receive?	
Is there a 'chat' function enabled so questions and comments can come in different formats?	
Where possible, during handling describe the weight and feel of the object. You may want to consider texture, temperature (is the object cold to the touch), any scent that might be present, etc. You may be asked to touch an item/s without gloves. How will you show scale?	
Have you prepared information sheets which you can fill in?	

C Checklists: After the viewing

AFTER THE VIEWING	NOTES TO SUPPORT AFTER THE VIEWING
How do you feel? Did anything come up which needs to be followed up from an emotional and psychological perspective?	
Are there resources for the viewers or the team involved from the museum that could be beneficially shared?	
Are there reflections you want to capture about the process; things that went well, things that were unexpected, things you would want to change?	
Are the relationships with the community involved changed? If so, how?	
Does your main/ lead contact within the community of viewers have the resources they need to address any issues which arose?	
Are you following up as agreed?	
How have you expressed your thanks?	
Who is collating/ making sense of the information captured? How will it be shared?	
Will any next steps happen within the expected timeframe?	
What questions are there from the session that you want to explore more?	
Did you learn anything unexpected?	
What additional information do you need to provide to the group?	
If information is being used (research/ data enhancement/ publication, etc) how is that being shared, and with whom? Are drafts being provided? Is the group able to edit/ amend? Who has final sign-off around information from the	

AFTER THE VIEWING	NOTES TO SUPPORT AFTER THE VIEWING
process? Do you or other colleagues have the capacity to update object records appropriately?	
If you have received information which appears to be contradictory, how will you capture/ express that information?	
How, and for what time-period, will any information (recording/ transcript/ notes) be stored and where?	
What is your next planned interaction with the group?	
Are you enabling the group to evaluate the experience? If so, how? Will any evaluation be anonymous? How will you use the evaluation?	
Are there items that need to be stored/ treated differently based on advice from the community? How will this be actioned?	

D Example follow-up questionnaire questions

The questions below are about the experience of the viewing and would be in addition to any follow up around objects and information gathered.

What do you think went well?

What could have been better/ what can we improve?

What did you find most useful about the remote viewing?

What did you find most challenging about the remote viewing?

Would you consider using the remote viewing technology again?

Is there any support we can provide following the viewing?

E Example information gathering table

In addition to information provided through your Collections Information System (Axiell, etc) which you are likely to have compiled and shared in a useful format in advance, the areas you may gather additional information for any object being viewed could be:

FIELD of INFORMATION	NOTES
Object name	
Inscriptions/markings	<i>Language, translation, meaning</i>
Relationships with other objects	
Materials	<i>Materials and local names for materials</i>
Production	<i>Methods, date, type</i>
Recommendations	<i>For handling, packing, display</i>
Notes	
Provenance	