**Page ID**: **#.# Card Sorting**

# Primary Content

**Title**

Enter the **Title** of the **Method** here (REQUIRED).

**Card Sorting**

**Description -- i.e., What it is:**

Enter the **Description** here (REQUIRED).

A method that provides data on how users are likely to group concepts together and associate the items with named categories.

During a card sorting session, participants organize items or topics into categories that seem correct to them.

* In a **Closed Sort**, participants are asked to sort the items into pre-named categories.
* In an **Open Sort**, participants generate names for each grouping they create. Card sorting can be done with tangible cards (index cards or post-its) or using online software.
* In an **Hybrid Sort**, some categories are pre-named, but the participant may also create other categories as needed.

**Recommended Uses**

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

* To understand how users (or groups of users) process information that is or will be embedded in a system. Card sorting informs the organizational structure of a system (the information architecture) and preferred workflow, which may dictate design choices for menus, toolbars, and any other navigational aspect of the system or interface.
* To confirm organizational structure in a proposed design by testing and validating it with representative users.

**Limitations**

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

* Card sorting is an inherently content-centric technique that does not take the users’ tasks into consideration.
* May capture “surface” characteristics only, if participants do not consider what the content is all about.

**Outcomes**

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

* A report that captures comments made by participants during the session, including indications of where difficulties arose and perhaps 2nd or 3rd choices considered.
* A table of quantitative data, such as the number of times items were grouped together and the percentage of participants that chose any given name for a grouping.
* Metrics for low and high user-agreement, which may indicate that users understand information differently, that the content was not well understood, or that content can be included in more than one area.

**Required Skills and Expertise**

Enter the **Required Skills** **and Expertise** here. If there are no details, insert N/A or TBD.

* Method can be leveraged with minimal training and practice.

**How to Proceed**

If there are no details, insert TBD.

* **How-To Guide.** Review step-by-step instructions on how to conduct a card sort and access tools and instruments to support your evaluation.
* **Schedule a Consult.** Connect with a usability specialist for support on your project.

[BEGIN: How to Do It]

**Introduction**

Enter the **Introduction** here (REQUIRED).

Card sorting is a method used to understand how a user organizes information in their head. Participants are given a set of items on cards and are asked to group them together based on how they think they are related. Card sorting can be structured in three different ways.

* **Open Sort:** Participants are not given any predefined categories and must label any groups they create
* **Closed Sort:** Categories are predefined by the researcher. Participant cannot create any categories themselves.
* **Hybrid Sort:** Some categories are predefined by the researcher. Participant can also create new categories if they choose to.

**Procedure**

Enter the **Steps** here. (Required).

The first step is to create a list of items that will go on each card. These items should be related to the tool that you are working on. For example, if you have a list of menu options and want to organize them, then you can put each menu option on a card. Nielsen Norman group recommends 40-80 options.

Depending on the format of the card sort, you may provide categories to the participant, or you may rely on the participant to create their own categories. Once you have your card items and categories, if needed, then it’s time to bring in participants. For each user, you present them with the set of cards and ask them to categorize them into groups. For any groups that are participant created (in hybrid or open sort), make sure the participant provides names for them.

Once the participant is done categorizing the items, you should ask them about whether there were any items that were particularly hard to classify under a category and also about whether any items could belong in two or more categories.

After you have collected your data about how people classify the items, you need to analyze how items were typically categorized. One method is to generate what is known as a dendrogram which visually shows which groups each item was categorized as the most. You can also qualitatively track how items have been categorized by each participant.

**Tools**

If there are no details, insert N/A or TBD.

* Pencil
* Paper
* Can also be conducted using software

[END: How to Do It]

**Author**

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

* Human Factors Engineering (HFE), Office of Health Informatics, Veterans Health Administration

**Sources**

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

* Killam, B., Preston, A., McHarg, S., Wilson, C. (2009). Card Sorting. In Usability Body of Knowledge. Retrieved April 29, 2020, from [**http://www.usabilitybok.org/card-sorting**](about:blank)
* Usability.gov (2013). Card Sorting. In usability.gov. Retrieved April 29, 2020, from [**http://www.usability.gov/how-to-and-tools/methods/card-sorting.html**](about:blank)

**References**

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

* N/A