Card Sorting Tools

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706.041 Information Architecture and Web Usability WS 2020/21
Graz University of Technology

25 Nov 2020

Abstract

TODO

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Introduction

An academic survey paper presents a survey or overview of the state of the art in a particular field. Every chapter and every section should have some introductory text at the beginning, like this text. Never jump straight in to the first secion or subsection without one or more paragraphs of introductory text.

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Chapter 6

kardSort

kardSort is an online card sorting tool that was created by a single developer as their master's thesis. It is a very intuitive and simple tool that is easy and rewarding to use. That being said it does lack in some features in comparison to its peers and might be a little too simple for some users [*kardSort* 2020].

6.1 Business Model

As to be expected from a master's thesis project the tool is fully free of charge. All features are accessible immediately and there are no extra features hidden behind some paywall.

The only prerequisite for using the tool is to create an account, either explicitly for the site or using an existing Google account. The account make sure all the work within the tool is saved and can be accessed again even after the session has been terminated. This also enables access to the experiments, regardless of device or geo- location. All experiments and data are saved in a cloud that is provided by kardSort.

6.2 Card Sorting

The card sorting in kardSort is very straight forward. There are no special gimmicks or features that make it stand out from other tools. They offer open, closed and hybrid card sorting. It is possible to include a welcome message and instructions for every experiment.

A feature that is quite handy at times, is the possibility to include a customizable questionnaire for an experiment. This questionnaire can be made up of any number of single line text, multi line text, check box or radio button questions and is displayed right before the actual sorting.

In terms of limitations during card sorting, we were able to find two. Firstly it is not possible to perform an experiment with more than 50 cards. This is a hard limit set during development that offers no workaround by a user. If this is a deal-breaking limitation, it could be possible to contact the developer about it and request more cards per experiment, as the tool does have a feature request page. Secondly it is quite exhausting working with more than five categories, as the way the tool is defined, it adds new categories at the very right of the previous categories. Therefore a lot of horizontal scrolling is involved when browsing larger number of categories.

A detailed summary of features can be viewed in Table 6.1.

6.3 Analytics

This is the caveat of kardSort, the part where it is truly lacking, because it does not offer any type of analytics for its experiments. There is the possibility of exporting all the relevant data of an experiment to .csv files for manual analytics or data preparation.

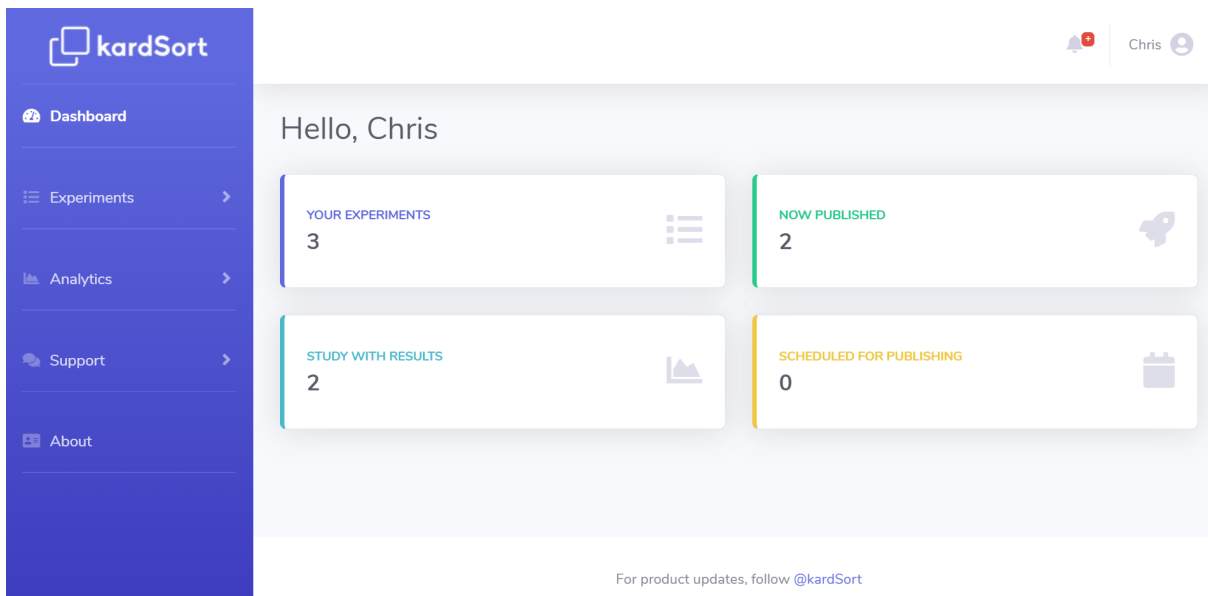**Figure 6.1:** This is the base view in kardSort. It shows you an overview of your experiments and in the side menu all further actions can be performed. [Screenshot was captured by Christopher Oser using *kardSort* [2020] on Google Chrome 84.]
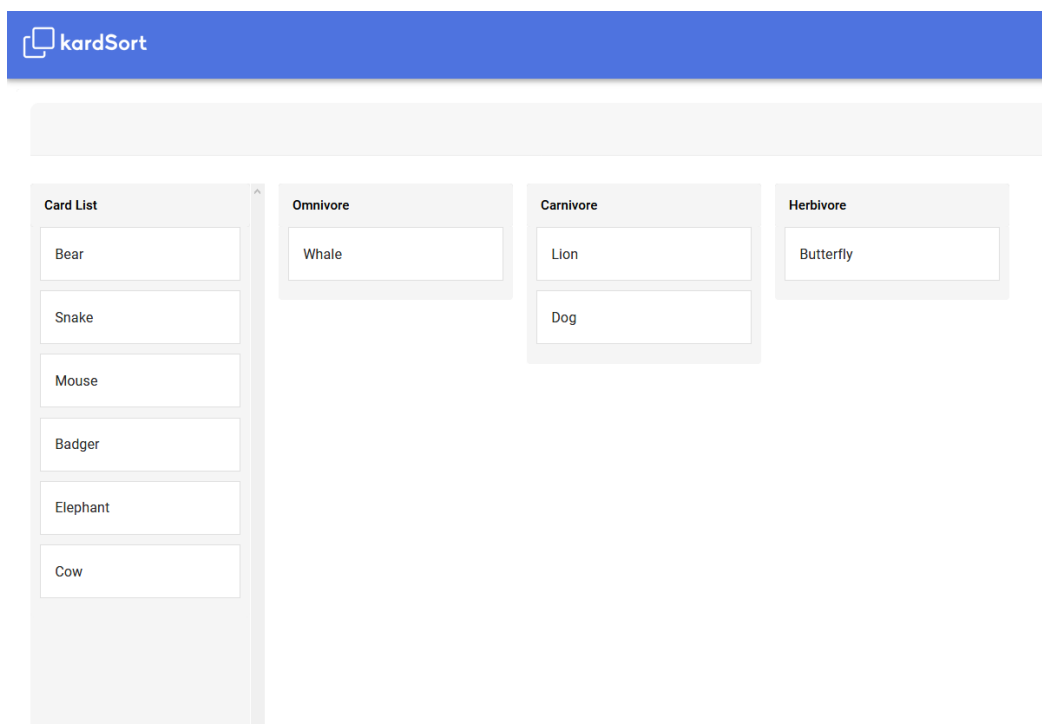

Figure 6.2: This is a screenshot during the card sorting process in kardSort. [Screenshot was captured by Christopher Oser using *kardSort* [2020] on Google Chrome 84.]

Feature/Characteristic	Availability in kardSort
Card Sorting	Open, closed and hybrid.
Card Limit	50
Participant Limit	None.
Analytics	Only export for Casolysis and SynCaps. No in-tool analytics
Documentation	None, but tool explains itself very well. No documentation was needed during review.
Business Model	Free.
Import formats	None. All data needs to be entered by hand.
Export formats	.csv for everything plus formats matching Casolysis and SynCaps.
Sub-Categories	No.
Playback of user-sessions	No.
Data preparation	Only by hand through export files.

Table 6.1: This table summarizes all the features and characteristics of kardSort to provide an easy to read overview.

Simplicity	Documentation	Features	Business Model	Average
5	1	1	5	3.0

Table 6.2: Ratings for kardSort including the average rating.

Additionally it also offers to export experiment data in the required format of two other card sorting analytics tools, namely Casolysis and SynCaps. These two tools are both free of charge and provide good analytics for card sorting experiments. Further information about them can be found in the respective Chapters 7 and [TODO: add chapter] within this survey.

6.4 Summary & Ratings

All in all kardSort provides a very good card sorting experience. Everything it does it does well. Apart from a card limit and some formatting with the categories there were no issues when reviewing the tool.

Of course it lacks greatly in comparison to other tools, since it does not provide any own analytics. Although it does provide you with the option to do the analytics elsewhere. So this could be a possible compromise for some users, making this nonetheless a viable option when in search for a card sorting tool.

For a quick overview and to make it easier to compare to other tools in this paper, we agreed on 4 ratings for the tool. The ratings can be found in Table 6.2 and range from 0-5.

Chapter 7

SynCaps

SynCaps is an older card sorting tool that is not available online. It is only usable as an offline Windows program that needs to be installed locally. Since 2018 the full package is offered free of charge and can be downloaded. It is not trivial to use and requires some time spent with the provided documentation videos. Its workflow is dated and requires some getting used to [*SynCaps* 2020].

As the tool does not offer any card sorting capabilities, this needs to be taken care of in some other way. Originally SynCaps was intended to be used in cooperation with paper card sorting. After the experiment was done one can import the data into SynCaps and analyze it. Nowadays it is also very easy to use other card sorting tools and then import the data into SynCaps for analytics.

7.1 Business Model

As mentioned earlier SynCaps is totally free of charge. There are no additional features to be unlocked by a paywall. Previously other restrictions applied, but since 2018 the tool is not only free of charge, but also licensing free.

Being an offline program, there is also no need for an account. Any data is saved locally and needs to be manually moved to be accessed in other environments.

7.2 Card Sorting

SynCaps does not provide any card sorting capabilities. It is intended to be used with paper card sorting or other tools. For paper card sorting, it provides an option to assign barcodes to cards, for easier importing of the results after the experiment.

7.3 Analytics

This is were this tool shines. When analyzing results from card sorting experiments, the options are quite numerous, not so say overwhelming. Before any analytics, there is the possibility for data preparation. Users can be singled out, cards as well as categories can be merged and lots more.

Once the data has been prepared the results can be analyzed within 5 different charts that can be further customized. These charts are made up of clusterings and dendrograms with different inputs. These charts are somewhat interactive, as a click on a datapoint will reveal more information about it, but that is also where the interactivity ends.

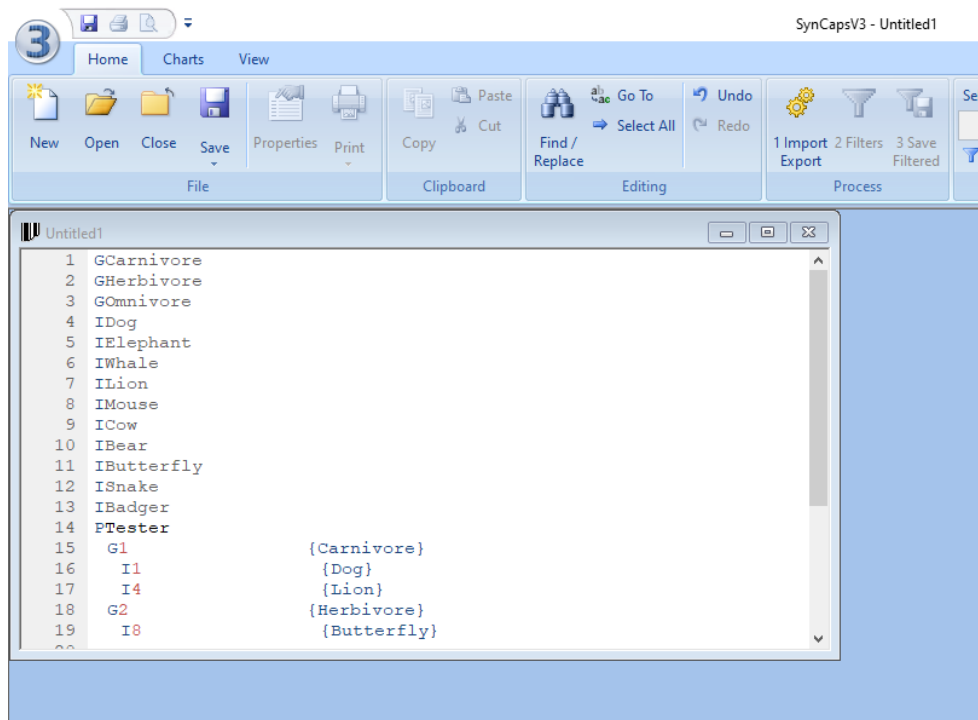The features are summarized in Table 7.1.

Figure 7.1: This is the base view within SynCaps. All input data is handled within a .txt file as shown in the screenshot. [Screenshot was captured by Christopher Oser using *SynCaps* [2020].]
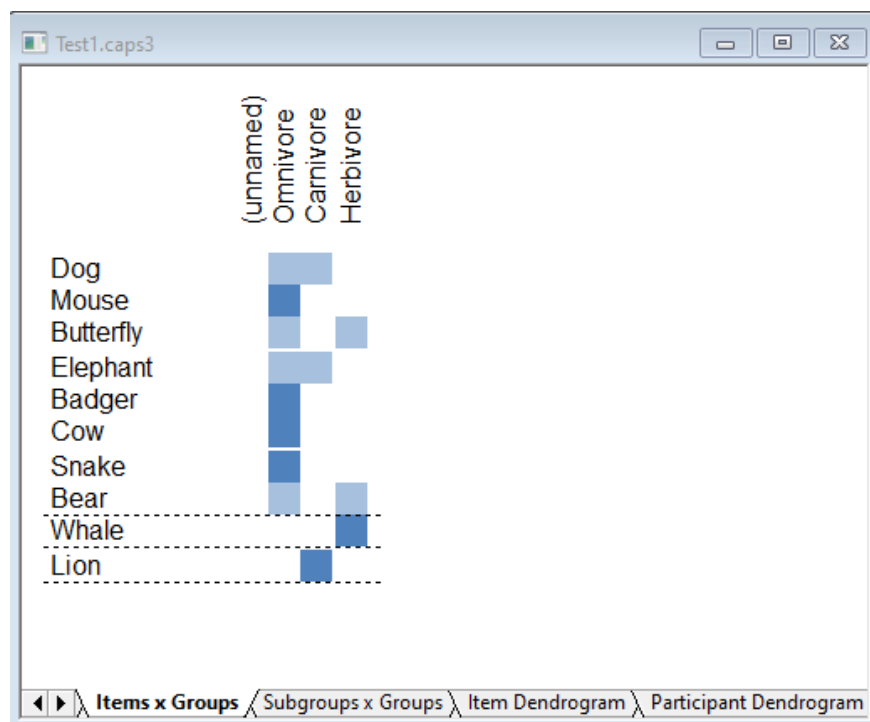

Figure 7.2: This screenshot shows a Cards x Groups clustering used for analytics. [Screenshot was captured by Christopher Oser using *SynCaps* [2020].]
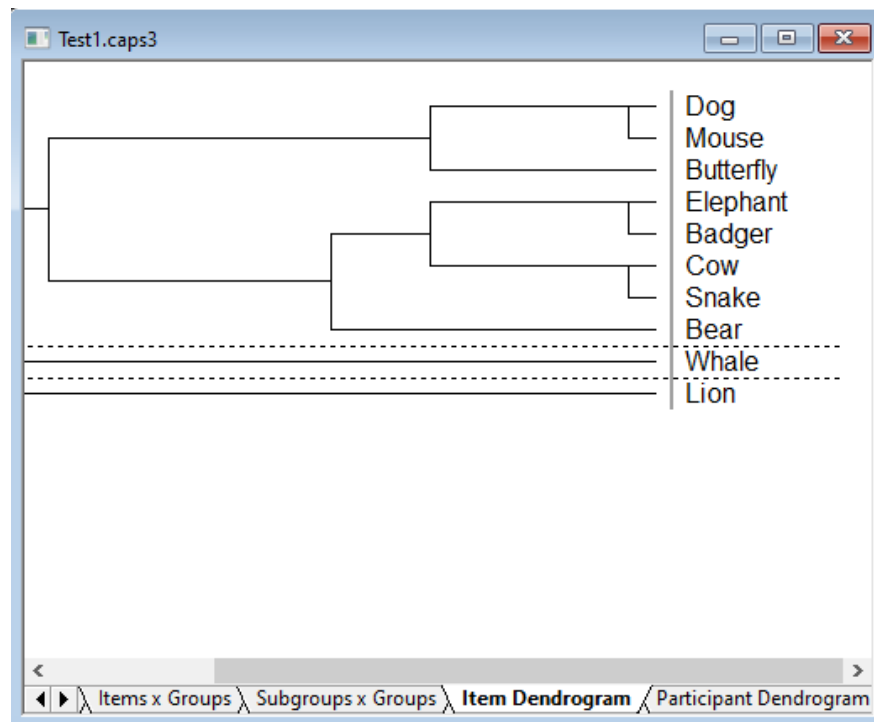
Figure 7.3: This screenshot shows a Cards dendrogram used for analytics. [Screenshot was captured by Christopher Oser using *SynCaps* [2020].]

Feature/Characteristic	Availability in SynCaps
Card Sorting	None. Paper Cards or other tools needed.
Card Limit	None.
Participant Limit	None.
Analytics	Analytics in 5 semi-interactive charts made up of clusterings and dendrograms
Documentation	Some dated videos.
Business Model	Free.
Import formats	.csv, .txt or paste
Export formats	.csv
Sub-Categories	Yes, sub-categories are supported
Playback of user-sessions	No.
Data preparation	Extensive options from user exclusion to card merging.

Table 7.1: This table summarizes all the features and characteristics of SynCaps to provide an easy to read overview.

Simplicity	Documentation	Features	Business Model	Average
1	2	4	5	3.0

Table 7.2: Ratings for SynCaps including the average rating.

7.4 Summary & Ratings

SynCaps is a solid analytics tool if you can get past its workflow and learning curve. The videos offered as documentation, but are not fun to watch to say the least. It offers many data preparation options and enables efficient evaluation of results with its many semi-interactive visualizations.

It is always necessary to pair SynCaps with either physical paper card sorting or another tool to perform the actual card sorting. If this is an option, then SynCaps can be very handy for analyzing.

For a quick overview and to make it easier to compare to other tools in this paper, we agreed on 4 ratings for the tool. The ratings can be found in Table 7.2 and range from 0-5.

Chapter 8

TOOL

TOOL INTRODUCTION.

8.1 Business Model

8.2 Card Sorting

8.3 Analytics

8.4 Summary & Ratings

Chapter 9

Concluding Remarks

At the end of your survey, give a clear recommendation as to which approach or tool to use in which situation.

Bibliography

kardSort [2020]. `https://kardsort.com/` (cited on pages 11–12).

SynCaps [2020]. `https://syntagm.co.uk/design/cardsortdl.shtml` (cited on pages 15–17).