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REPORT TEMPLATE

This document is a report template. Its purpose is to demonstrate sample layout and content for a complete report. This particular template illustrates a card sort report, but the same basic sections can be modified and used for any user research activity.

CARD SORT

Product Name (*version number, if applicable*)

<Department Name>

Author:

Creation Date:

Test Dates: *<mm/dd/yy – mm/dd/yy>*

Version: *<Draft or Final>*

Last updated: *<Month, YYYY>*

Report Contributor(s)

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| --- | --- | --- | --- |
| **Name** | **Position** | **Role** | **Contact Information** |
|  |  | Co-moderator |  |
|  |  | Videographer |  |
|  |  | Designer |  |

Report Reviewer(s)

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| **Name** | **Position** |
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Supporting Documents

|  |  |
| --- | --- |
| **Document title** | **Owner** |
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Usability History

|  |  |  |
| --- | --- | --- |
| **Activity** | **Author** | **Date of study** |
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Executive Summary

*Briefly introduce the product and the motivation for conducting this activity. Provide an overview of the number of participants, dates, purpose of the session(s), number of sessions and a summary of the results of the study. If a particular design recommendation is being made, include an image of the proposed design.*

Proposed Information Architecture or Menu structure <optional>

[Insert figure if available]

Travel Card Sort Table of Recommendations

|  |  |
| --- | --- |
| **In app tab name** | **Objects to be located within the tab** |
| Resources | Tipping information  Languages  Currency  Family-friendly travel information |
| News | Travel deals  Travel alerts  Featured destinations  Weekly travel polls |
| Opinions | Read reviews  Post and read questions on bulletin boards  Chat with travel agents  Chat with travelers  Rate destinations |
| Products | Travel games  Luggage  Books  Links to travel gear sites |

Background

*Provide a brief description of the product and the anticipated tasks that users will accomplish with it.*

*State the number and dates of the sessions. You can use the following paragraph to describe the purpose and goals of the card sort. You can also describe the rationale for conducting a card sort (e.g., to derive a new tab or menu structure for an application). Modify the following to your own specific needs.*

Card sorting is a common user research technique used to discover the users’ mental model of an information space (e.g., a website, app or menu). It generally involves representing each piece of information from the information space on an individual card and then asking target users to arrange these cards into groupings that make sense to them.

Method

Participants

*Briefly describe the participants who were recruited, the number of participants, the method of recruitment (e.g., internal participant database, customers, recruiting agency), and the incentive (e.g., $100 in AMEX gift checks, or a company logo mug). If conducting multiple group sessions, discuss the number of groups and composition of each group. Also include recruitment criteria (see Appendix 1). Below is an example.*

Recruitment was based on specific criteria. The screening profile required that users:

■ Could not work for a competitor

■ Were over 18 years of age

■ Demonstrated proficiency in the language used in the card sort.

Detailed user profiles can be found in Appendix 2. Participants were recruited via Ideal Recruiting and were compensated with a $100 gift check for their time.

Materials

*Describe the cards. For example, did the cards contain a description and/or a line for an alternative label? Descriptions and space for an alternative label are optional. Next, show a sample card. Below is an example.*

Each card contained a label, a short description of the concept/label, and space for participants to write in an alternative label. Figure X shows a sample card from this activity.

Procedure

Participants read and signed informed consent forms and non-disclosure agreements. <*If you did a warm up activity, mention it here.> <Insert number>* members of the UX group acted as moderators for the session. Moderators answered participants’ questions and handed out and collected card sorting materials.

Participants worked individually throughout the session. Each participant was given an envelope containing a set of *<Insert number>* cards in random order representing the concepts included in *<insert product name here>* – see Appendix 3.

*<Optional: The following text can be used as a boilerplate procedure for defining the subtasks. Customize it to your own needs.>*

The card sort activity involved three subtasks: card sort read/rename, card sort initial grouping, and card sort secondary grouping. Card sort subtasks were presented to the participants as separate and discrete steps. Instructions specific to each subtask were given separately. Participants were not told what they would be doing in the later steps because this might have biased their decisions. Details of each subtask are summarized below.

Part 1. Card Sorting Read/Rename

■ Participants read through each card to make sure they understood the meaning of the function. The test facilitator instructed participants not to order the cards.

■ Participants renamed any cards they found unfamiliar or inappropriate by crossing out the original name and writing in an alternative(s).

Part 2. Card Sorting Initial Grouping

First, participants sorted the cards into logical groups. When everyone had finished reading the cards, participants were instructed to:

**“Arrange the cards into groups in a way that makes sense to you. There is no right or wrong arrangement. We are interested in what you perceive to be the most logical or intuitive arrangement of the cards.”**

*<Optional: Typically there are no constraints on the number and size of groups that participants can create. If there are constraints, provide them here.>* Participants were told that they should make no more than *<Insert number>* groups, each with no more than *<Insert number>* cards.

After finishing the groupings, participants named each group on a Post-it note and attached the note to the groups.

Part 3. Card Sorting Secondary Grouping

■ Participants sorted the grouped cards into higher-level groups if any were apparent.

■ Participants named each of the higher-level groups on a Post-it note and attached the note to the groups.

<Optional> See Appendix 4 for the complete instructions provided to the participants.

Results

*Note that authors may choose to divide the Results into several subsections dealing with sorting data, terminology, and user comments. Customize what follows according to your needs.*

Sorting Data

The card sorting data were analyzed using a cluster analysis program called *EZCalc* to derive the overall sort shown in Figure X. The figure shows the composite sort of all *<Insert number>* cards for all *<Insert number>* participants. The closer the concepts are to each other on the sorting diagram, the more conceptually related they are. *EZCalc* generates groups based on relationship strength between items.

***Figure X : Sorting Results Diagram***

*<Optionally, include more images as needed>*

*<Optional: Insert callouts in the image to show the groupings and their names. Discuss how the sorting results can be translated into a UI design. For example:>*

The yellow and white bands can be used as a guide for determining the new menu structure. Figure X shows the suggested menu labels and menu content derived from these card sorting data.

*If the recommendations deviate from the* EZSort *results, explain why. When appropriate, make your results as visual as possible. You can also use other kinds of images (schematics, tab layouts, etc.) to communicate your design recommendations.*

Travel Card Sort Table of Recommendations

This table provides the recommended architecture for the subtabs of the planning tab. The proposed architecture is considered high priority.

|  |  |  |
| --- | --- | --- |
| **Tab name** | **Objects to be located within the tab** | **Status of recommendation** |
| Resources | Tipping information  Languages  Currency  Family-friendly travel information | Accepted |
| News | Travel deals  Travel alerts  Featured destinations  Weekly travel polls | Accepted |
| Opinions | Read reviews  Post and read questions on bulletin boards  Chat with travel agents  Chat with travelers  Rate destinations | Accepted |
| Products | Travel games  Luggage  Books  Links to travel gear sites | Pending. The team may not be adding this functionality to the first release. |

Terminology Data <section optional>

*Optionally, add a subsection about terminology issues discovered during the card sort activity (e.g., relabeling, questions from participants to the session moderator). If relabeling occurred, include a table (see below) showing which concepts were relabeled, with what frequencies, and what the participant-generated labels were. A column with terminology recommendations should also be included.*

Alternative Labels for Concepts <Optional>

|  |  |  |  |
| --- | --- | --- | --- |
| **Current label** | **Concept description** | **Label provided by participants** | **Recommendations** |
| Airline deals | These are deals or discounts that airlines are currently offering. | Flight deals (6 of 10 participants) | Flight deals |
| …. |  |  |  |
| …. |  |  |  |
| …. |  |  |  |

Participant Comments <section optional>

*If a think-aloud protocol was used, or if you allowed users to make comments at the end of the activity, include a section highlighting participants’ comments. Only include participant comments if those comments affected your recommendations.*

Conclusion

*Discuss the implications of the card sort data on the information architecture of the product. Do the data validate the current direction of the product? If not, discuss how the product team should change their designs to be more consistent with the users’ mental model of the domain.*

*<Optional: Discuss future usability activities to be conducted as a follow up.>*

Appendix 1

*Insert your screening questionnaire. For a sample, see Sample Screener,* *page XXX*.

Appendix 2

Participant Profiles

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Participant #** | **Employer** | **Job title** | **<Other requirement>** | **<Other requirement>** | **<Other requirement>** |
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*Some information to consider including in the table:*

■ *Company size*

■ *Industry*

■ *Line of business*

■ *Experience with a particular domain, application, or product.*

*If applicable, gender, age, and disability may be included.*

Appendix 3

Card Set

*Show the complete set of cards used in the study. List the card names and definitions listed on the cards. Below are some examples:*

Travel news

*Definition:* The latest news that relates to traveling

Travel deals

*Definition:* Travel specials or discounts offered by the website

Children’s promotions

*Definition*: Travel specials or discounts offered by the website that relate to children

Vacations packages

*Definition:* Travel packages that include combinations of transportation, accommodations and other features

Appendix 4

Participant Instructions

*Show the complete instructions provided to the participants, including rules about relabeling, grouping, etc. Below is an example.*

“The cards in front of you have pieces of objects/information that might be contained within a travel website.

1. Look over all of the cards.

2. If something is confusing, make a note on the card.

3. Sort the cards into groups that you would want or expect to find together.

4. Try to reduce them to 4 or fewer groups.

5. Each group cannot have less than 3 cards or more than 11 cards.

6. Use a blank card to give each group a name.

7. Staple each of the groups together.

8. Take the provided envelope and write your initials on the front. Put the stack of stapled cards in the envelope.”

**Figure X:**Sample Card