

Gallery Codex Card Sorting and Web Survey Results

The card sorting exercise consisted of two parts: an online, webmonkey-driven survey to gauge general user experience with the Codex site, and an online card-sorting exercise hosted by websort.net.

The gallery-docs team uploaded the survey and recruited participants. Valerie Riedel handled the online card sort and preliminary analysis of card sorting results.

This report will focus mainly on the card sorting results, and present a brief summary of the online survey.

Online Survey: Key Results

The survey probed users' self-identified frequency of Codex use:

- 50% visit site monthly
- 39% visit weekly
- 11% visit the site daily

The survey also probed users' self-identified skill level with Gallery:

- 60% intermediate
- 20% advanced
- 20% beginner

Users were invited to submit comments about the reasons they visit the site, what is good about the site, and what could use improvement. A few themes emerged in the responses:

- Many users said they visit the Codex site to look for specific documentation/solve specific problems, and to see what's new and what new releases are out.
- Users noted that there is a "lot of info" on the site, and some considered it a positive thing, while others suggested there was so much content that finding specific topics could be difficult.
- A few users commented on the age of the content. A few mentioned out of date documentation and pages that link to discussion threads (rather than real information in a concise format), while a few noted that the content is very current and up to date.
- A few people would like more information about themes/modules.

Card Sorting: Setting Up the Exercise

The card sorting exercise represented the foundational content on the Codex site, which groups content by product (G1, G2) and by audience (general, developers).

Topics normally separated by product (G1, G2. etc.) were combined into a single set of cards that users sorted. The exercise was intended to probe users' intuitive sense of what content goes together, and why. Issues explored included (but were not limited to) the following:

- Should the download files be part of a topic (grouped with other pages that discuss modules), or isolated on a downloads page (which would include modules, packages, etc.)?
- Is the G1 – G2 structure so logical and ingrained to users that they would introduce release-specific labels in their sorting?
- Do enough users understand the “developers” label?
- Are users more interested in task-based labels (installing, customizing, managing, etc.), or are they searching for types of information (documentation, installation instructions, etc.)?

Card List

68 cards were created to capture the base-level content in the Codex.

Card	Content it Maps To
Installation	Category:Gallery1:Installation
Installation Requirements	<ul style="list-style-type: none"> • Category:Gallery1:Installation • Gallery2:Installation_Requirements • Gallery1:Installation Requirements
Configuration Wizard	Category:Gallery1:Installation
Special Installation Considerations	Category:Gallery1:Installation
Installing Gallery on Unix/Linux	Category:Gallery1:Installation
Installing Gallery on Windows	Category:Gallery1:Installation
Installing Gallery on Mac OSX	Category:Gallery1:Installation
Using Themes	Gallery2:Themes
Customizing Themes	Gallery2:Themes
Code Review Scripts	Gallery2:CodeReviewTips
Development Approach	Gallery2:Development_Concepts
Development Standards	Gallery2:CodeReviewTips (coding standards section)
Developer Support	Gallery2:Developer_Starterkit
Developer's Guide	Gallery2:Developer%27s_Guide
Comparison of Gallery 1 and Gallery 2	G1-G2_Comparison

Card	Content it Maps To
Known Issues	Gallery2:KnownIssues
User Contributions	<ul style="list-style-type: none"> Gallery2:UserContributions, Gallery1:UserContributions
Setting Up URL Rewrite in Embedded Mode	Gallery2:EmbeddedRewrites
Download Packages	Gallery2:Download
Download Themes	Gallery2:Download
Download Modules	Gallery2:Download
Download Upgrades	Gallery2:Download
Frequently Asked Questions (FAQs) for Gallery 2	Gallery2:FAQ
Managing Gallery	Gallery2:How_Tos
Adding Items to Gallery	Gallery2:How_Tos
Optimizing Performance of Gallery	<ul style="list-style-type: none"> Gallery2:How_Tos Gallery1:Performance
Customizing Gallery	Gallery2:How_Tos
Using Imageblocks in Gallery	Gallery2:How_Tos
Customizing Slideshow Defaults	Gallery2:How_Tos
Optimizing Gallery for Search Engines	Gallery2:How_Tos
Integrating Gallery with Your Website	Gallery2:How_Tos
Adding Printing Services to Gallery	Gallery2:How_Tos
Migrating from Gallery 1 to Gallery 2	Gallery2:migration
Setting Up Gallery 2 Multisite	Gallery2:Multisite
Upgrading Gallery 2 Multisite	Gallery2:Multisite
Changing from Standalone Gallery 2 to Multisite	Gallery2:Multisite
.Tpl File Reference	Gallery2:Tpl_Reference
Localizing Gallery	Gallery2:Localization
Test Matrix	Gallery2:TestMatrix
User Stories	Gallery2:UserStories
List of Gallery 2 Developers	Gallery2:Developers
Creating and Using Colorpacks	Gallery2:Modules:ColorPack
Creating Imageframes	Gallery2:Imageframe
What is Gallery?	Gallery

Card	Content it Maps To
Upgrading Gallery	Gallery1:Upgrading
Features of Gallery	Gallery1:Features
Managing Users and Permissions	Gallery1:Users_and_Permissions
Embedding Gallery Into a Content Management System	Gallery1:Embedding
Securing Gallery	Gallery1:Securing
Backing Up and Restoring Gallery	Gallery1:Backup_and_Restore
Creating An Offline Copy of Your Gallery	Gallery1:Creating_an_Offline_Copy
Migrating Your Gallery to A New Server	Gallery1:Migrating_Gallery
Applying Patches to Gallery	Gallery1:Patching
Creating Patches for Gallery	Gallery1:Patching
Mirroring Gallery	Gallery1:Mirroring_Gallery
Frequently Asked Questions for Gallery 1	Gallery1:FAQ
Getting Help	Gallery1:Getting_Additional_Help
List of Gallery Developers	Gallery1:Credits
Web Hosting Service Referrals	gallery.menalo.com/wiki/Web_Hosting_Referral_Page
Donate to Gallery	Donations
Mailing Lists	Mailing_Lists
Contributing to Gallery: Google Summer of Code	Summer_of_Code
Meeting Minutes for Gallery Project	Meeting_Notes
Requesting New Documentation for Gallery	Codex:Documentation_Requests
Frequently Asked Questions for Gallery Remote	GalleryRemote:FAQ
Developing a Translation for Gallery Remote	GalleryRemote:i18n
Gallery Local	GalleryLocal
Other Scripts and Plugins for Gallery	Other_Clients

Card Sorting Analysis

Number of Categories

Thirty users divided the 68 cards into groups, then gave each group its own label/category name. Each user, on average, created 6.8 categories to group the cards into:

- Minimum categories created: 4
- Maximum categories created: 13
- Average categories created: 6.8

Type of Categories

- 19.8% created category labels that were actively task focused (using, managing, installing, and other –ing verbs, and/or labels like “How to”)
- 80.2% created categories that were not

Categories Created with the Highest Agreement Among Users

In some cases, different users created identical or nearly identical category labels (one might have created a category called “Installing,” while another created a category called “Installation”). The following categories were created by the largest number of users:

Category Name	% of Users
Developers	87%
Installation	50%
Customizing	33%
About Gallery	30%
Support/Help	30%

Recommendation: The reorganized Codex site must keep help/documentation about G1 separate from help/documentation about G2. The above categories would be a good primary-level breakdown to use within the G1 and the G2 product areas:

Gallery 1

- Developers
- Installation
- Customization
- Help
- About Gallery

Gallery 2

- Developers
- Installation
- Customization
- Help
- About Gallery

Be sure to make the category names as parallel as possible, matching nouns (development, installation, customization) or verbs (develop, customize, install).

The "About Us" or "About Gallery" label is fine as it is, and is consistent with usability and content labeling best practices.

Categories Created with Moderate Agreement Among Users

Category Name	% of Users
Administration	23%
Downloads	23%
General Information	20%
Using Gallery	17%

Categories Created with Low Agreement Among Users

Category Name	% of Users
Installation and Upgrading	13%
Getting Started	13%
Gallery Maintenance	10%
User's Guide/Handbook	10%
Gallery Remote	10%
Advanced Use	10%
How to	10%
FAQ	10%
Community	10%
Troubleshooting	10%
Configuration	10%
Maintenance	10%
Themes	7%
Beginners/First Time Users	7%
Gallery Local	7%
Contributions	7%
Extending Gallery	7%
Migration	7%
Why choose Gallery?	7%

Categories Created by Only One User

Category Name	% of Users
Gallery Extras	3%
Others	3%
Appearance and Functions	3%
Website stuff	3%
Webmaster Information	3%
Integration	3%
Styling	3%
G1 to G2	3%
Pre Gallery 2 stuff	3%
Tools and Add-ons	3%
Gallery 1	3%
Gallery 1 Basics	3%
Gallery 2 Basics	3%
Migration	3%
Advanced Usage: Installation Modes	3%
Blatant Money-Grubbing	3%
Helpful Stuff	3%
Technical Stuff	3%
Soft	3%
Resources	3%
3rd party	3%
Tweaking Gallery	3%
Content Management	3%
Setting Up Gallery	3%
Features	3%
Credits	3%
What does gallery do?	3%
Look and Feel	3%
Unsorted	3%
Don't know	3%
Enhancements	3%
What others are doing	3%
Installation - Integration	3%
Welcome	3%
Help Gallery Out	3%
Intermediate	3%
Modifying Gallery	3%
Be on the air	3%
Translation	3%
Upgrades and Security	3%
Documentation	3%
End User	3%

Note: Labels like "general" "overview" "resources" and "helpful information" are often too generic/nondescriptive to be usable web labels.

Category Consistency

Different users might each create a similar category label, but group a completely different set of cards under that label. Focusing on the most agreed upon category names, Valere reviewed users' agreement about which cards belonged in the category.

Category Name	Consistency of Content in Category	Cards/Topics Most Commonly Placed in Category	Other Cards/topics Placed in Category
Developers	Moderate to high A few sorters put "advanced" kinds of task information here as well.	Development Standards, Code Review Scripts, Developer Support, Development Approach, Developer's Guide, Creating Patches for Gallery, Developing a Translation for Gallery	change from standalone to multisite, adding printing services, offline copy, imageframes, colorpacks, URL rewrite, customizing, integrating with your website, adding items, gallery local, migrating G1 to G2, optimizing performance, embedding into CMS, patching, meeting minutes, documentation request, Gallery credits, mailing lists, user stories

Category Name	Consistency of Content in Category	Cards/Topics Most Commonly Placed in Category	Other Cards/topics Placed in Category
Installation	<p>Consistent core content, with a little bit of everything thrown in here and there.</p> <p>Some users created a “getting started” topic that captured much of the same information.</p>	<p>Installation, Installation Requirements, Configuration Wizard, Installing on Mac, Installing on Windows, Installing on Unix</p>	<p>migrating to a new server, adding printing service, securing, setting up G2 multisite, known issues, URL rewrite, upgrading G2 multisite, managing gallery, g1-g2 comparison, integrating with your website, embedding into CMS, applying patches, webhosting services, change from standalone to multisite, download modules, download packages, download upgrades, backing up/restoring, other scripts/plugins, gallery local, download themes, FAQs for G1 and G2, donate, What is gallery, features of gallery, URL rewrite, getting help</p>
Customizing	Moderate to high	<p>customizing gallery, colorpacks, embedding into CMS, customizing themes, using themes, user contributions, Optimizing for SEO, download themes, integrate with your website, imageblocks, other scripts/plugins, customizing slideshow defaults</p>	<p>download modules, upgrading, contributing/google summer, download packages, download upgrades, customize themes, tpl reference, imageframes, URL rewrite, localizing, creating patches, optimizing performance, adding printing services, imageframes, change from standalone G2 to multisite, applying patches, development approach, developer’s guide</p>

Category Name	Consistency of Content in Category	Cards/Topics Most Commonly Placed in Category	Other Cards/topics Placed in Category
About Gallery	Moderate Seems to mix two topics: "About the Gallery Project" and "About the Gallery Software". One user created a category with much of this content but named it "Welcome".	Donate, features, user stories, what is gallery, web hosting referrals, FAQs for G2, Meeting minutes, comparison of G1 and G2, FAQs for G1	list of G2 developers, list of G developers, installation requirements, FAQs for Gallery remote, mailing lists, special installation considerations, requesting new documentation, user contributions, contributing: Google summer, gallery local, mirroring, known issues,
Support/Help	Moderate Some other labels for this category: <ul style="list-style-type: none"> • FAQ • Help & FAQ • Support • FAQs and useful information 	FAQs for G2, FAQs for G1, Mailing lists, getting help, requesting new documentation, comparison of G1 and G2, what is gallery, features, FAQs for Gallery remote	test matrix, using themes, adding items, user stories, creating an offline copy, special installation considerations, installation requirements, web hosting referrals, other scripts and plugins, known issues
Administration	Not consistent		
Downloads	Very consistent	All four "Download" cards.	
General Information	Vague category		
Using Gallery	Vague category		
Installation and Upgrading	Expands installation to include software upgrades/maintenance		
Getting Started	This would be a nice category of information to present for the first-time user.		

Card Sorting: Additional Cards Created

A few card sorters added new topics (cards) into the card sorting exercise:

- Integrating Gallery Stylistically Into Your Website
- Detailed Reference: How Each Setting Works
- For New SysAdmins: What to know about taking over and continuing maintenance on existing Gallery sites.
- Troubleshooting and Error Messages
- Integrating Advertisements
- Using Imageblocks in Gallery
- Isolating Gallery: Where is Everything Stored?
- Gallery Scaling Issues and Setting User Limits
- Recovering From Disaster
- How URL Rewrite Works and When To Enable It
- A Word About Your Responsibility To Your Users
- Requirements and Limitations When Using Gallery Commercially
- Administrator FAQs
- Adding Outside Photo Printing Services to the Menu
- About the GPL: Rights, Responsibilities and How To Find Out More
- File & Database Formats
- Gallery Project History
- Embedding Gallery with APIs
- Creating Add-In Modules
- Using Gallery with eBay and Other Similar Services
- Adding Links to Outside URLs and Media
- Restricting Your Gallery: Permissions
- Neat Tips & Tricks
- Organizing Your Albums
- Using Captions, Summaries, Descriptions and Keywords
- Moving Between Items: Navigating Your Gallery
- Changing Your Password and Account Settings
- Sharing Your Gallery With Email Notifications and RSS
- Using Slideshows
- Using Third-Party Photo Printing Services
- Selecting a Theme
- Using and Maintaining Comments
- Changing Properties of Items and Albums
- What extensions are available.
- FAQ for modules
- What are the parts of the Gallery system

A majority of these new topics were expressed with a task focus (sharing, using, selecting, etc.)

Orphaned Cards

In a few cases, users created categories that contained one and only one card. In card sorting, cards are orphaned for one of several reasons:

- The cards are poorly labeled (people can't determine what kind of content would be under that label).
- The cards represent content that users don't know about or understand.
- The cards represent content that really just doesn't "fit".

Orphaned cards (number of users who orphaned the card):

- Gallery Local (3)
- Frequently Asked Questions for Gallery 1 (3)
- User Stories (2)
- User Contributions (1)
- Comparison of Gallery 1 and Gallery 2 (1)
- Installing Gallery on Mac OSX (1)
- Localizing Gallery (1)

Cluster Tree: Visual Depiction of Card Sort Data

The xSort software created a cluster tree that shows which topics users grouped together, at what level of consistency (level of agreement among users that a certain set of topics belonged together).

View file `Codex_cluster_tree.png` to review the cluster tree.

Horizontal lines extend to the right of each card name and link up at some point to a larger grouping of cards. The farther to the right a line goes before it intersects with another, the less confidence there is about including that item in the larger group.

For example, in the tree, the Installation, Installing on Windows, and Installing on Unix cards are very tightly linked, but the Installing on Mac card is a little less tightly linked to that cluster, and the Configuration Wizard card is even less tightly linked to that cluster.

Moving Ahead

For usability's sake, the reorganized Codex site must keep help/documentation about G1 separate from help/documentation about G2.

Basic Structure for Codex Revision

Consider using category labels with the highest agreement among users as a set of subcategories under both G1 and G2.

- Gallery 1
 - Developers
 - Installation
 - Customization
 - Help

- Gallery 2
 - Developers
 - Installation
 - Customization
 - Help
 - About Gallery

Use your product knowledge, the table that maps card names to page URLs, and the cluster tree to identify which topics/page groupings go below each subheading. Be sure to review the Customization category carefully to see if it is a meaningful and accurate way to group content.

More Interpretive Structure for Gallery Codex Revision

- Gallery 1
 - About Gallery 1
 - Getting Started with Gallery 1
 - Installation
 - Customization
 - Help

- Gallery 2
 - About Gallery 2
 - Getting Started with Gallery 2
 - Installation
 - Customization
 - Help

- Other Gallery Products
 - Gallery Local
 - Gallery Remote

- Develop for Gallery

- Download Files

- About the Gallery Project

What this structure does:

- Moves Development into its own area, to call more attention to it. Enough users recognized and understood the Development label, so this should be OK.
- Moves the products that some people aren't familiar with (Gallery Local, Gallery Remote) to a separate location with a category label that suggests these are different.
- Adds a "Getting Started" subcategory to G1 and G2 (many card sorters created something like this).
- Adds a Downloads page. This is important content that some users grouped together in one page, even though others placed download items in related topic areas (pages for themes, modules, etc.).

Other Recommendations and Key Findings

- Consider cross-linking more often – Downloads information could be in a Getting Started section, a Downloads section, and an Installation section.
- Category labels should be nouns (customization, installation, etc.), but consider re-titling content pages to use a task focus (installing, customizing, etc.). The majority of new cards that users created during the sort were task-focused (page titles began with a gerund – Verb-ing).
- Consider modifying pages to include more meaningful titles. This goes hand in hand with the previous recommendation. The wiki seems to set a default title for the page that matches its location (for example: Gallery1:Installation). Consider adding a real title ("Installing Gallery 1" below the default title, or in place of it (if that's possible).