

Virtual Sort Setup Checklist



This is a checklist of the items needed/decisions to be made at each step of the Virtual Sort setup process. It is possible to start a Virtual Sort Group and save and return to complete the setup.

Details of each step start on page 2.

☐ **Step 1: Set up Organization (if this is first Action - Virtual Sort or Survey - for the Organization)**

☐ **Step 2: Set up and Save Virtual Sort Group**

☐ **Part 1 – Group Name _____**

☐ **Part 2 – Library Specific Setup**

☐ **Part 3 – Demographics (optional)**

☐ **Part 4 – Close and Reminder Dates, custom messages, and type of invitation**

☐ **Step 3: Enter Participants**

☐ **Step 4: Review and Launch (Send Email Invitations)**

Important Points to Know about the Virtual Sort

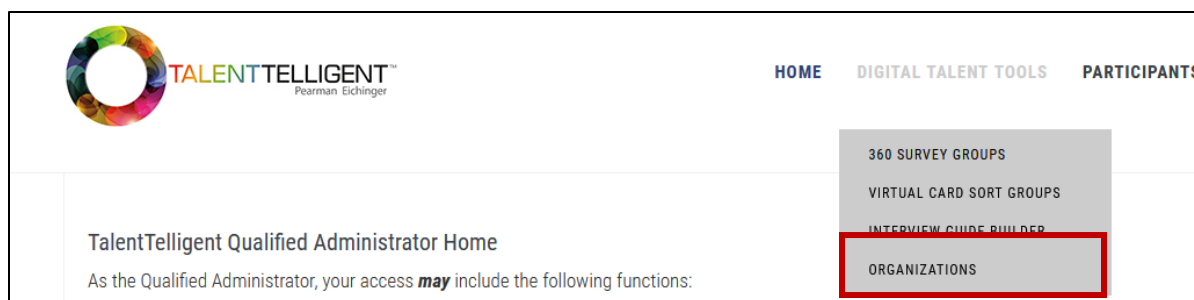
- As the Qualified Administrator, you will select the demographic variables, the KSA library, the sort question, and manage the participants. Carefully select the variables to be used when setting up the sort. You will have the opportunity to edit the variables until the sort is launched.
- It is essential to understand that the end reports and profiles are determined by the variables you select before launching the digital sort.
- The launch process is entirely in your control. You can edit the sort parameters and the participants at any point before you launch the sort. Once you launch the sort, the variables will be locked, and participants will be notified to participate. You can add additional participants after the initial launch.

Virtual Sort Setup Checklist



Step 1: Set up Organization (This step is needed once per organization. Once an organization is set up for any action - Virtual Sort or Survey - you can go directly to Step 2 for subsequent groups attached to the same organization.)

From your QA System Home Page, go to Digital Talent Tools > Organizations



ADD ORGANIZATION

* Required Fields.

* Organization Name

* Organization Address

* Organization City

* Organization State

* Organization Zip

* Contact Name

* Contact Email

* Contact Phone

* Organization Size

Integers only please

* Organization Economic Sector

Select

* Organization Type

Select

Organization Logo

Browse...

No file selected.

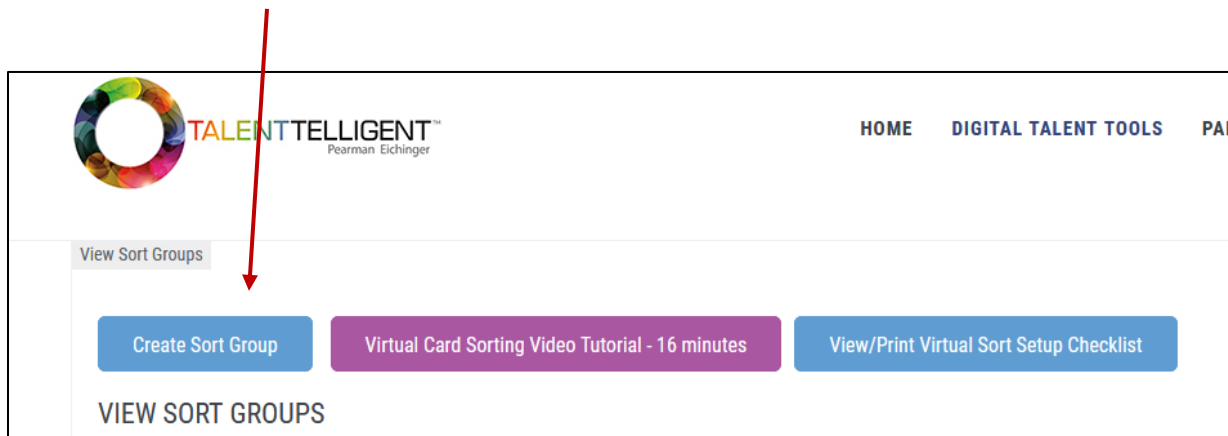
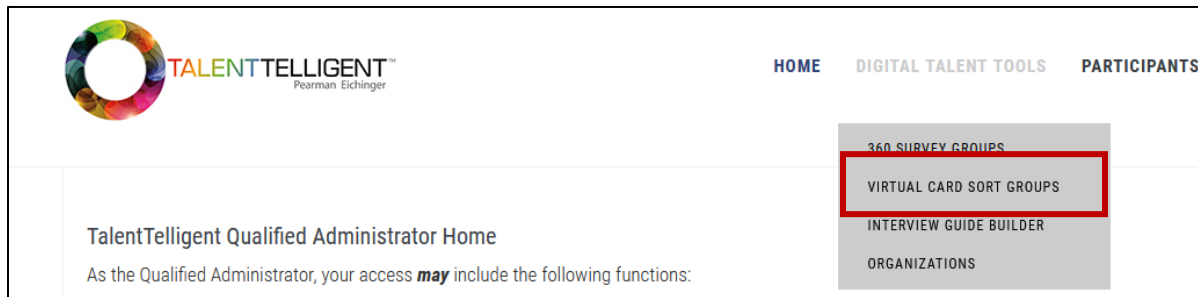
SAVE ORGANIZATION

Note that the organization logo will display in invitation emails and on the surveys. If no logo is uploaded, the TalentTelligent Logo will display.

Virtual Sort Setup Checklist



Step 2: Set up Virtual Sort Group (Digital Talent Tools > Virtual Card Sort Groups)



There are 3 main sections of Step 2.

Part 1 – Choose the Organization and name the new group.

Clone Existing Sort Group – A Yes for this option allows you to clone some elements of an existing completed sort group, including a subset of practices selected in the original group.

Part 2 – Decide on the Library and other elements specific to the type of sort. If you chose Y to clone an existing sort, then some of the library parameters will be fixed and not able to be changed.

Part 3 – Set up demographics that you wish to gather about sort participants.

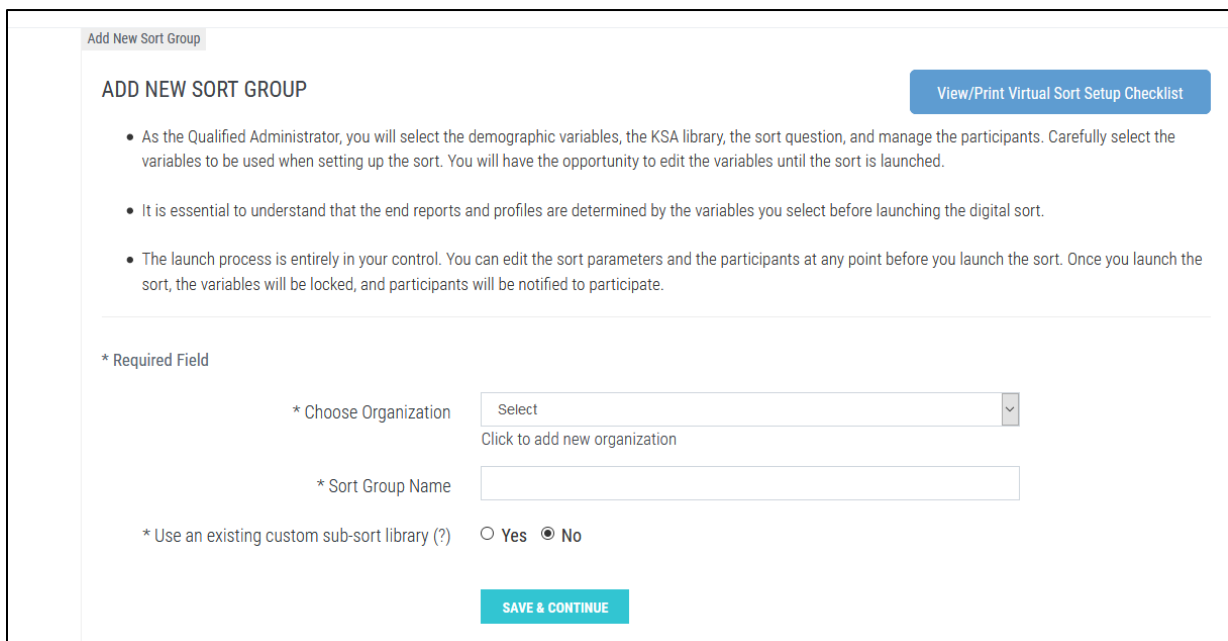
Virtual Sort Setup Checklist

Step 2 - Part 1:

***Organization** (Choose from previous setup)

***Sort Group Name** (customizable, a name with meaning to the process)

***Clone Existing Sort Group (Y/N)** (No is the default and would be used in a new Sort)



The screenshot shows the 'Add New Sort Group' form. At the top left is a tab labeled 'Add New Sort Group'. The main heading is 'ADD NEW SORT GROUP'. In the top right corner is a blue button labeled 'View/Print Virtual Sort Setup Checklist'. Below the heading are three bullet points: 'As the Qualified Administrator, you will select the demographic variables, the KSA library, the sort question, and manage the participants. Carefully select the variables to be used when setting up the sort. You will have the opportunity to edit the variables until the sort is launched.', 'It is essential to understand that the end reports and profiles are determined by the variables you select before launching the digital sort.', and 'The launch process is entirely in your control. You can edit the sort parameters and the participants at any point before you launch the sort. Once you launch the sort, the variables will be locked, and participants will be notified to participate.' Below these points is a section titled '* Required Field'. It contains three items: '* Choose Organization' with a dropdown menu showing 'Select' and a link 'Click to add new organization' below it; '* Sort Group Name' with a text input field; and '* Use an existing custom sub-sort library (?)' with radio buttons for 'Yes' and 'No' (where 'No' is selected). At the bottom center is a blue button labeled 'SAVE & CONTINUE'.

Step 2 - Part 2:

***Sort Question Category** (Dropdown-choose from a preset list of sort categories or choose Custom Question. If you choose custom Question, a text box will appear for you to enter your question. This question will be the question the participants are sorting based upon.)

***Sort Question** (Choose from preset list of questions, If you chose Custom above, this will auto-fill as My Custom Question.)

***Which Library** (KSAL, KSAM, KSAI, KSAP, KSAT)

***Number of Sort Columns** (3 or 5). This is the number of sort piles the participants can sort the items into.

***Sorting Column Labels** (Choose from a pre-set list of labels or choose Custom and enter your own. These labels appear at the top of the sort piles, as sort categories.)

***Sorting Type** (Relative or Absolute)

Virtual Sort Setup Checklist



Relative Sort (even number of Practices in each pile) The Practices in this pile of a sort are all less than all of the rest in the higher piles. Practices in this pile are not done as well as all of the others in the higher piles. There will be differences (ranked within a pile) within the high pile because you were directed to put an even number of Practices in each pile.

Absolute Sort (any number of Practices in any pile) The Practices in this pile of a sort are all less than all of the rest in the higher piles. Practices in this pile are not done as well as all of the others in the higher piles. Since you could put any number of Practices in this pile, there may be very few or a lot.

ADD NEW SORT GROUP - KSAL - Sample Virtual Sort

- Complete the fields below or confirm that they are correct from a previous sort group

* Required Field

* Sort Question Category

Overall Enterprise Question

* Sort Question

Select

Click to **view all full text sort questions.**

* Which Library

KSAL - KSA for Leaders

* Number of Sort Columns

(5) Five Columns

* Sorting Column Labels (5)

Select

([Learn More](#))

* Sorting Type

Relative

([Learn More](#))

RETURN

SAVE & CONTINUE

Step 2 - Part 3:

Demographics: None of the demographics are required. To include a demographic category, select Y next to the item. Most of the items have defined options. A few allow for custom entries by the QA.

Note that if you choose to include a demographic category, that item will be required to be completed by all participants.

There are 3 tabs containing the demographic choices.

Tab 1: Employee-Specific:

Gender – defined options:

- Male
- Female

Virtual Sort Setup Checklist

- Other

Age – defined options:

- Less than 25
- 25-34
- 35-44
- 45-54
- 55-65+

Tenure – defined options: (Tenure with this organization)

- Less than 1 year
- 1-3 years
- 4-6 years
- 7+ years

Education – defined options:

- High School
- 2-year degree
- 4-year degree
- Master's
- Professional (PhD, lawyer, doctor)

Tab 2: Job-Related:

Organizational Level – defined options:

- C-Suite Executive
- Executive
- Manager
- Individual Contributor
- Consultant
- Board of Directors

Organizational Function – defined options:

- Sales and Marketing
- Manufacturing and Production
- Human Resources
- Information Systems
- Finance and Accounting
- Customer Service
- Engineering
- Operations
- Management

Virtual Sort Setup Checklist



- Strategic Leadership
- Retail
- Utilities
- Technology
- Other

Work Location Type – defined options:

- Corporate
- Field

Department – customizable

- Enter your defined options. Use the Tab or Enter key to add the entry to the list. You can add as many items as desired.

Job Title/Position – customizable

- Enter your defined options. Use the Tab or Enter key to add the entry to the list. You can add as many items as desired.

Tab 3: Geographic:

Country (choose what to include) – defined options:

- If you choose to include countries, a defined list will appear, and you will check those countries to include. You can manually open the country list to see the available options.

USA States/Territories – defined options:

- All States/Territories will appear in a dropdown for the participants selection.

City (or City/State/Region for non-US) – customizable

- Enter your defined options. Use the Tab or Enter key to add the entry to the list. You can add as many items as desired.

Organizational-specific locations – customizable

- Enter your defined options. Use the Tab or Enter key to add the entry to the list. You can add as many items as desired.

Virtual Sort Setup Checklist

Step 2 - Part 4:

***Close Date** - The date beyond which the sort cannot be completed.

Auto Reminder Date – Optional, to choose a date to send a reminder automatically.

Optional custom Email Message to include in invitation to Raters. This message will be included in all emails sent from the system (re-send, reminders). This message can be edited as needed.

Survey Email Invitation Option – 1. Send a sort link in invitation email: This option will send a link that will take the participant directly to the sort. 2. Send sort code in invitation email: This option will send a URL and a code. The participant will go to the URL and enter or copy/paste the code. This option is available to avoid active links that may cause problems being delivered by some company security systems.

EDIT SORT GROUP - KSAL Sample Sort

- Select the date that will close the sorting process for this group.
- Sorts that are not complete by this date will not be included in the data gathered.

* Required Field

* Close Date

08/28/2021

Number of days before closing date to auto send final reminder.

0

Optional custom Email Message to include in Invitation to Sorters.

Click to **view Invitation Email** sent to sorters and location of this custom message.

Survey Email Invitation Option (?)

Send a Survey Link in Invitation Email

[Learn More](#)

SAVE & CONTINUE

After saving the group, you will go back to the sort grid. From there, click Review & Launch. This is also the location to manage participants after the sort is launched.

Create Sort Group

Virtual Card Sorting Video Tutorial - 16 minutes

View/Print Virtual Sort Setup Checklist

VIEW SORT GROUPS

Show 25 entries

Edits made to group.

Search:

Click Review & Launch to Finish Sort

Sort Group Name	Survey Library	Launch Date	Close Date	Sorters Complete	Manage Group	Review/Launch/View
KSAL - Sample Virtual Sort	KSAL-Sort	-	-	0 of 0	Delete Edit Manage Sorters	Review & Launch
KSAL Sample Sort	KSAL-Sort	02-09-2021	08-28-2021	0 of 8	Remind All Manage Sorters Edit	View Virtual Sort
KSAM Sample	KSAM-Sort	-	-	0 of 0	Delete Edit Manage Sorters	Review & Launch

Showing 1 to 3 of 3 entries

Previous 1 Next

Virtual Sort Setup Checklist



Step 3: Add participants.

This is also the location you return to review any details about the sort and manage the participants at any time while the sort is open.

*Participant First Name

* Participant Last Name

* Participant Email

If demographics were selected, the QA can, but is not required to, enter those values at this point. The participants will also be presented with the demographic information when they start the sort and can add/change as needed.

REVIEW SORT GROUP - KSAL - Sample Virtual Sort

- Review all the details of the sort group here.
- Use the Return Button to view and edit previous details.
- Use the Launch Now Button to start the Sort. The participants will receive welcome emails and you will not be able to alter the sort group details once the sort has been launched, you will be able to add and edit participants. Participants entered after the sort is launched will receive a welcome email as soon as they are entered.

Review all aspects of sort group

Group Name	KSAL - Sample Virtual Sort
Create Date	02-12-2021
Close Date	-
Library	KSAL-Sort
Sort Question	Sort the Roles/Drivers/Practices which identify the degree of importance of these behaviors for our enterprise's future.
# of Columns	5
Column Labels	5 Pile Importance (Critical or Key or Essential or Most Necessary or Important Nice to Have or Middle or Contributes Some or Minor Importance No Contribution or No Importance)
Sort Type	Relative

RETURNADD/EDIT PARTICIPANTSRETURN TO ALL SORT GROUPS

Cannot launch sort until participants added and a close date is set. Close date also needs to be a date in the future.

Uploaded Sort Participants

Show entries

Search:

First Name	Last Name	Complete	Email	Profile
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Virtual Sort Setup Checklist

You have 3 options for adding participants to the group.

-Add Participants from a previous sort. This allows you to select a previous sort and add the same sorters to this group. After you select a previous sort, you will be able to see and exclude some participants before uploading to this group.

-Bulk Upload Sorters. This allows you to upload sorters using a .csv file. The template is available for download.

-Add New Participant. This allows you to add participants one at a time.

ADD SORT PARTICIPANTS - KSAL - Sample Virtual Sort

- You will be required to enter the first name, last name and email.
- Any other demographic information that you do not enter will be required of the sorter at the beginning of the sorting process.
- The sorter will also be able to change/correct any demographic information you enter here, except name and email.
- **IMPORTANT: You have 92 unused credits in your inventory.**
- To purchase additional credits, please click [here](#)

Click to Add Participants from Previous Sort

Click to Bulk Upload Sorters

Click to Add New Participant

REVIEW SORT

RETURN TO GROUP VIEW

Uploaded Sort Participants

Show

25

 entries

Search:

First Name	Last Name	Complete	Email	Profile
No data available in table				

Virtual Sort Setup Checklist

Step 4: Review and Launch. After adding participants, click Review Sort. This will take you back to the sort page for this group where you can review all the details and if ready, Launch the Sort. This will send the invitations to the participants.

You can add additional participants at any time while the sort is open. Any participants added after the sort is launched will receive their invitations as soon as they are entered.

Review all aspects of sort group

Group Name KSAL - Sample Virtual Sort
Create Date 02-12-2021
Close Date 07-30-2021
Library KSAL-Sort
Sort Question Sort the Roles/Drivers/Practices which identify the degree of importance of these behaviors for our enterprise's future.
of Columns 5
Column Labels 5 Pile Importance (Critical or Key or Essential or Most | Necessary or Important | Nice to Have or Middle or Contributes | Some or Minor Importance | No Contribution or No Importance)
Sort Type Relative

[RETURN](#) [ADD/EDIT PARTICIPANTS](#) [RETURN TO ALL SORT GROUPS](#) [LAUNCH NOW](#)

Uploaded Sort Participants

Show entries Search:

First Name	Last Name	Complete	Email	Profile	
Sample RaterF1	RaterL1	N	ahp549@gmail.com	Edit	Show Demographics

After Launch, the grid will show View Virtual Sort. This will take you to the Virtual Sort Dashboard where you can view the sort results in a variety of formats.

Create Sort Group Virtual Card Sorting Video Tutorial - 16 minutes View/Print Virtual Sort Setup Checklist

VIEW SORT GROUPS

Edits made to group.

Show entries Search:

Sort Group Name	Survey Library	Launch Date	Close Date	Sorters Complete	Manage Group	Review/Launch/View
KSAL - Sample Virtual Sort	KSAL-Sort	-	-	0 of 0	Delete Edit Manage Sorters	Review & Launch
KSAL Sample Sort	KSAL-Sort	02-09-2021	08-28-2021	0 of 8	Remind All Manage Sorters Edit	View Virtual Sort
KSAM Sample	KSAM-Sort	-	-	0 of 0	Delete Edit Manage Sorters	Review & Launch

Showing 1 to 3 of 3 entries Previous 1 Next