NVivo Classifications and Datasets for PC Users

UBC Research Commons, 2018

Contents of the handout

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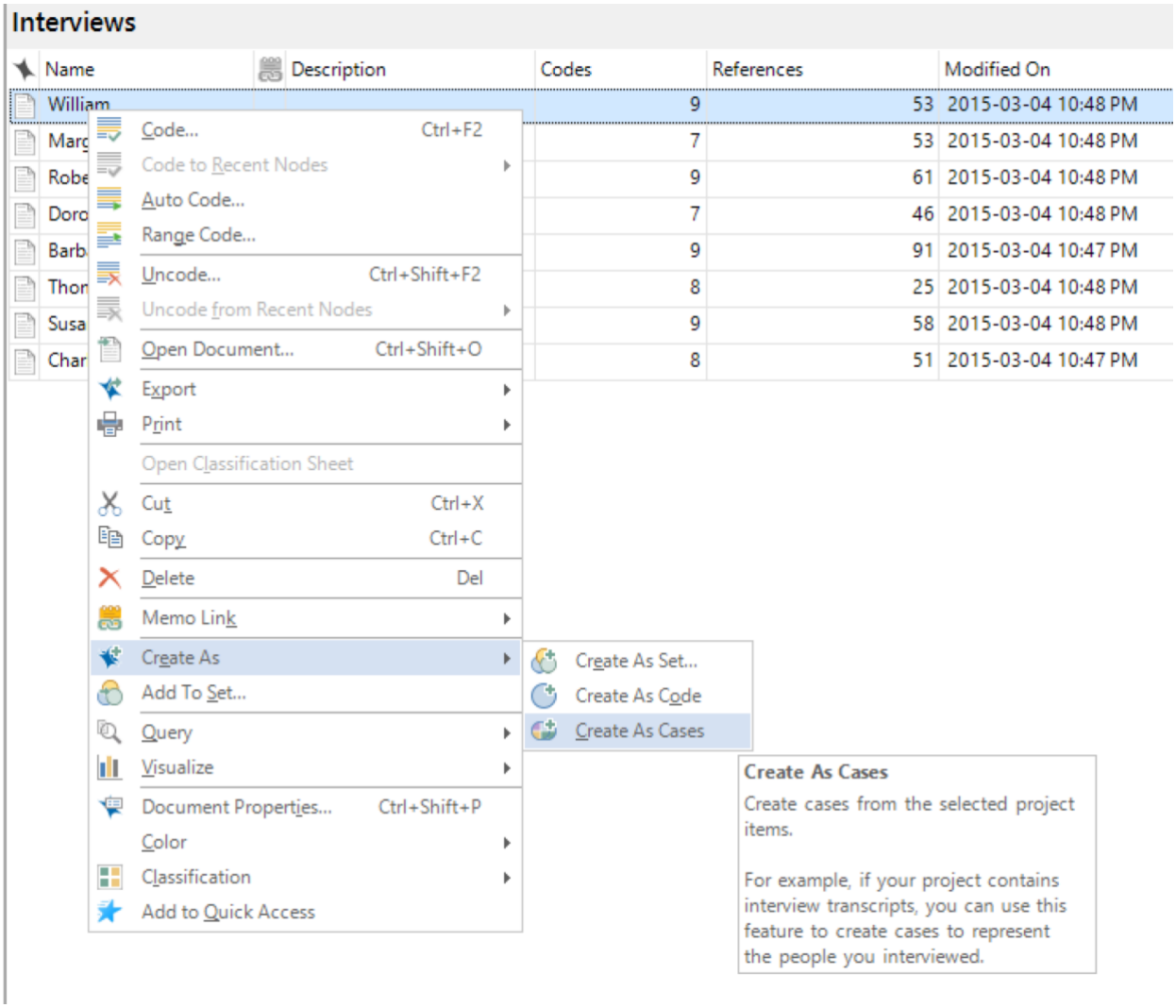
1. Cases

To create a new Case – i.e., to create a node that represents a participant or company

- Select the file (e.g. document with interview transcript) that you want to create a case for. To select multiple files, hold down CTRL while you click the files. To select all files in a list, click the first file in the list view, then hold down Shift and click the last file in the list
- Go to the **Home** Tab, and in the 'Item' section, click on "Create As Cases", then you can select the Case folder and click "OK" button to create the new case node

OR

- Right-click on the file you want to create a case for (You can also select multiple files to create more than one case at time)
- On the menu that pops up, go to "Create As", and select "Create As Cases"
- Your new case can be found now under the Cases folder



2. Case Classifications

Creating a new Case Classification

- Go to the **Home** Tab, and in the 'Classification' section, click on 'Case Classification' and then select "New Case Classification"

OR

- Right-click in Case Classifications List View, and select "New Classification" from the menu

OR

- Once in Case Classifications List View, use the shortcut CTRL+Shift+N

THEN

- EITHER: Enter the name for the new classification (description is optional)
- OR: **Use a Predefined Case Classification**
  There are two options
  - Person: Attributes include Name, Sex, Age Group, Occupation, Country of Birth
  - Organization: Attributes include Name, Sector, Size, Industry

Adding an Attribute to a Case Classification

- Click on the Classification you wish to add the attribute to
- Go to the **Home** Tab, and in the 'Classification' section, click on 'Case Classification' and then select 'New Attribute'

OR

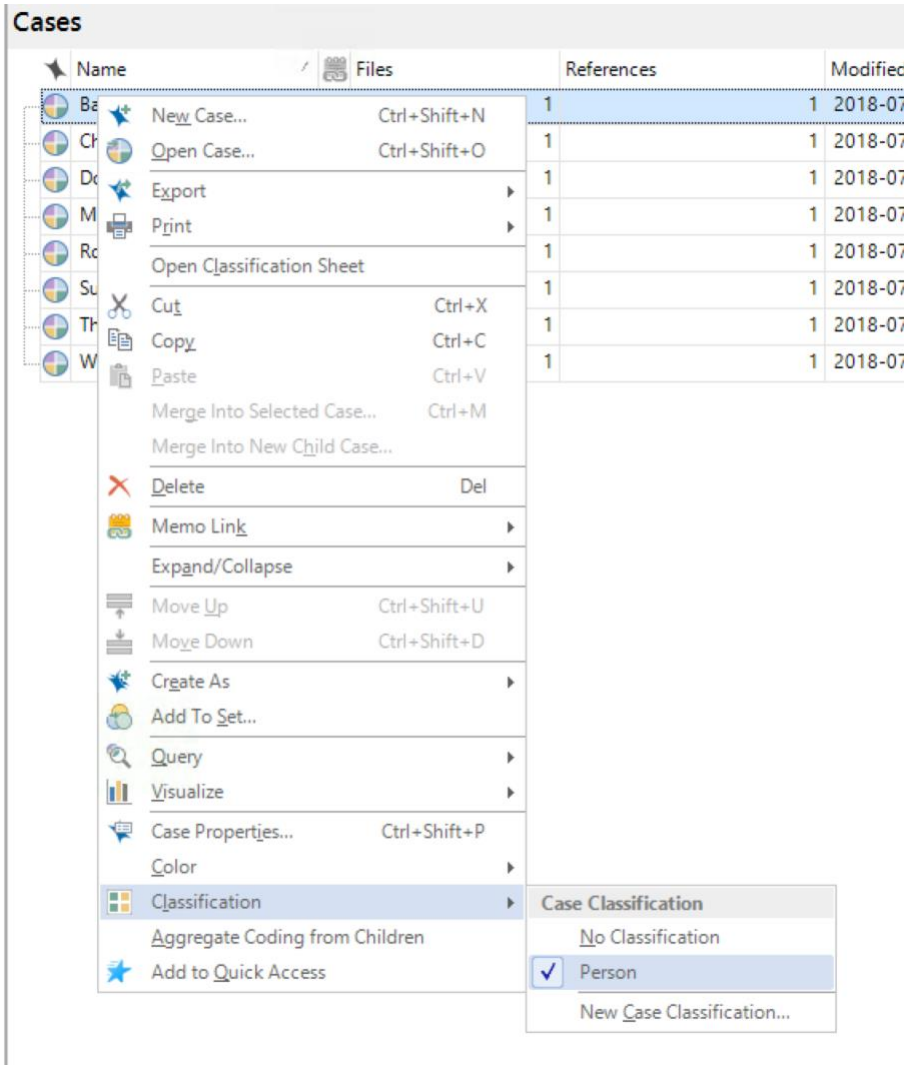
- Right-click on the Classification, and select "New Attribute" from the menu

OR

- Click on the Classification, and then use the shortcut CTRL+Shift+N

Adding a Classification to a Case

- Right-click on the Case you want to add the Classification to.
- In the drop-down menu, go to "Classification", and then select the Classification you wish to add.



2. Importing Survey data

IMPORTANT!

You cannot edit your original dataset or add records after you import it, so make sure all the information you need is in the dataset before you import it.

Importing a dataset: The Survey Import Wizard

When you want to import a dataset

- Go to the **Import** tab and in the Survey section and select the file you want to import it from (Excel, txt, Survey Monkey, or Qualtrics).

OR

- Right-click in the **List View** of the folder you'd like to import the dataset to, then click "Import Survey", and select a file (Excel, txt, Survey Monkey, or Qualtrics)

Step-by-step Survey Import Guide (example with an Excel file)

- ✓ Select the spreadsheet, text file, or Online Survey results you'd like to import.
- ✓ ***For spreadsheets*** (.xls, .xlsx): If the spreadsheet file you're importing has multiple worksheets, select the worksheets you wish to import (you can only import one worksheet at a time).

  OR

  For text files (.txt, .csv): Select your File Encoding (if you can't see your data in the preview window, change the option in the drop-down menu), Text Delimiter (Tab or Comma), and Text Qualifier (i.e., if your text values are surrounded by single or double quotation marks) values.

- ✓ Survey Import Wizard will open

Survey Import Wizard

Step 1. "Welcome to the Survey Import Wizard"
Click 'Next'

Step 2. "Check Your Data Format"
Specify the number of header rows and how dates should be interpreted
Click 'Next'

Step 3. "Manage Your Survey Respondents"

- Select Case location for your NVivo project
- Select a unique ID for each case
- Create a new OR Assign an existing Classification

Typically the suggestion made by the Wizard can be automatically used
Click 'Next'

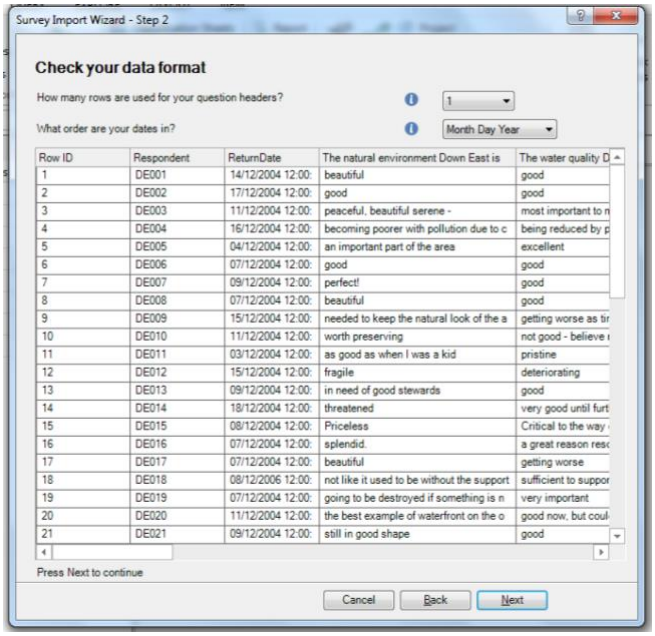
Step 4. "Identify open-ended and close-ended questions"

- Identify you survey questions (variables) as close-ended or open-ended questions or choose to not import responses to certain questions
- You can scroll through different respondents to see the type of answers to questions in case you are not sure if a question should be coded as open-ended or close-ended

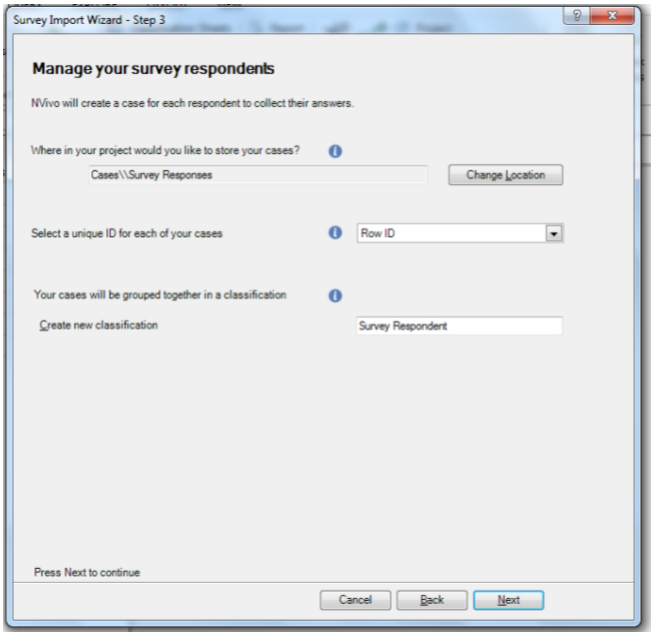
NVivo makes a suggestion for classifying your questions, but double-check if it's right before proceeding
Click 'Finish'

Step 5. "Processing Survey"
The window that pops up will take a few seconds to finish, then when all rows are checked off, you can click 'Close'

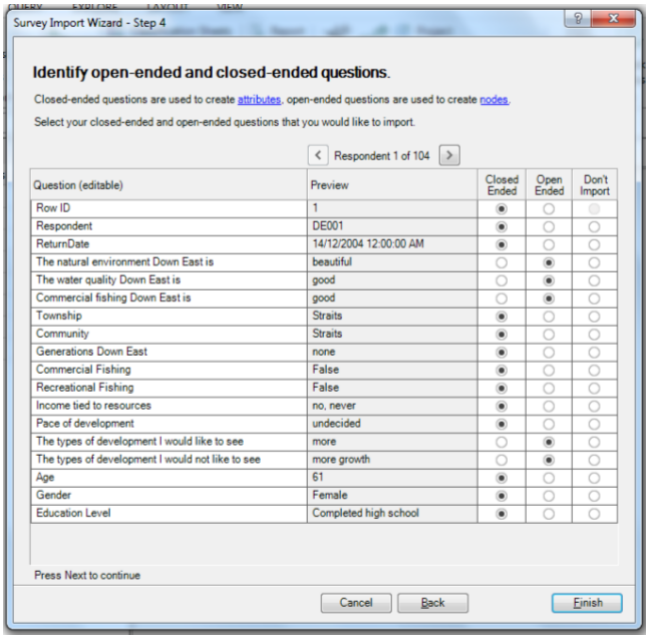
Step 2



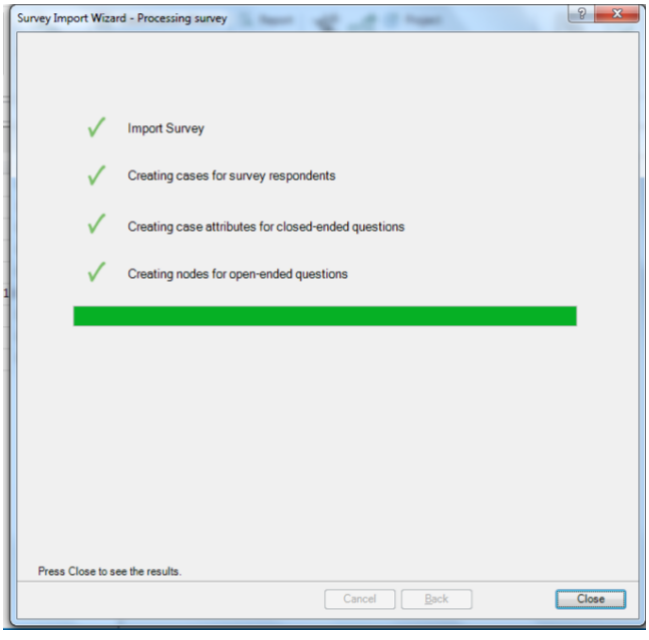
Step 3



Step 4



Step 5 (Finish)



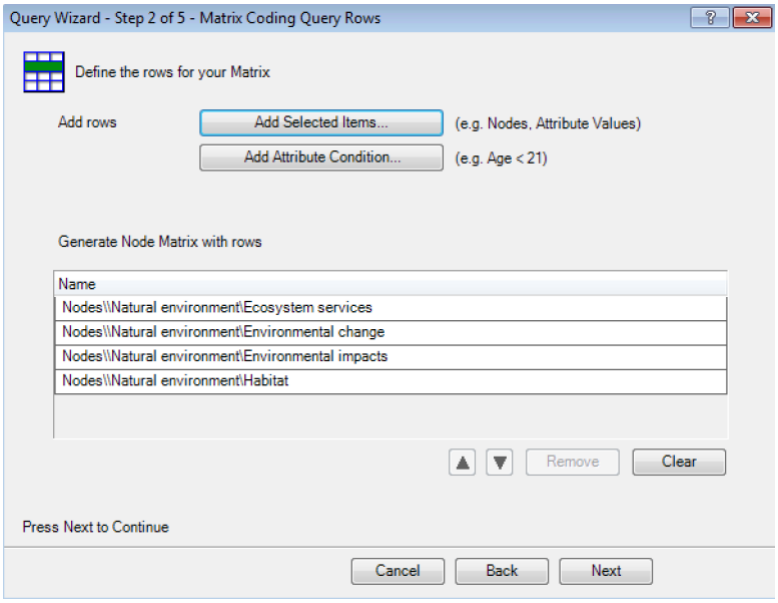
To rename your survey data or add description, you need to go to Properties after the Survey Import Wizard is complete.

Unlike in earlier versions of NVivo (until and including NVivo 10), now your dataset will be auto-coded automatically as you specified in the step-by-step survey import wizard.

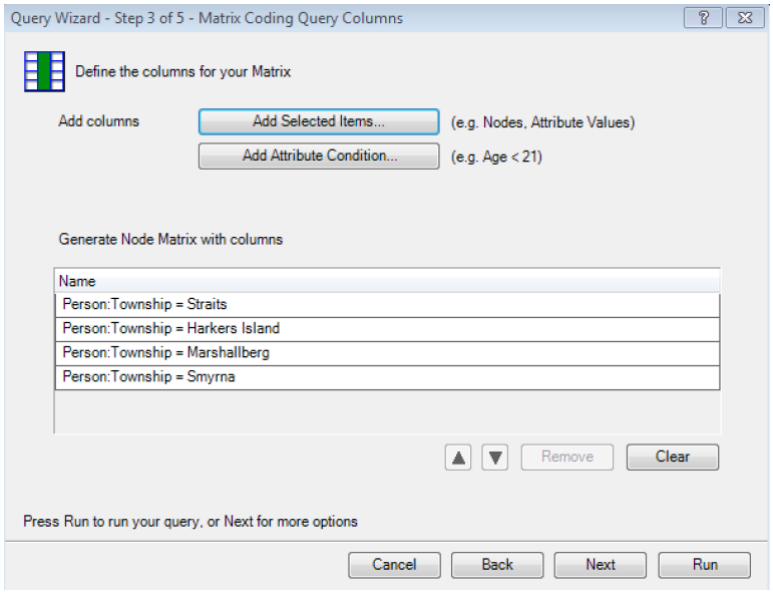
3. Matrix coding queries

Create a Matrix Coding query using the Wizard

- On the **Explore** tab, in the **Query** group, click **Query Wizard**
- Click **Find coding intersections between two lists of items**, and then click **Next**
- On **Step 2** and **Step 3** of the Wizard, add the rows and columns you want to show in the matrix
    - Click **Add Selected Items** to add a row/column that represents a specific node, file, content with a particular attribute value or other project item



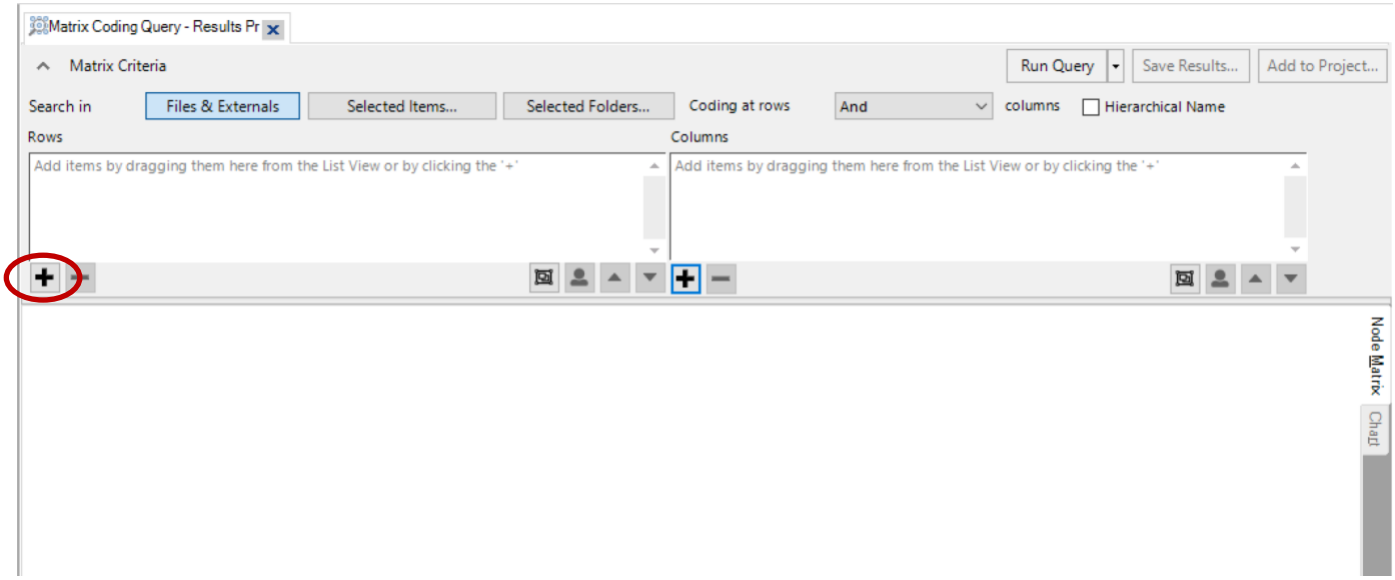
    - Click **Add Attribute Condition** to add a row/column that represents all the files or nodes that meet specific attribute value criteria



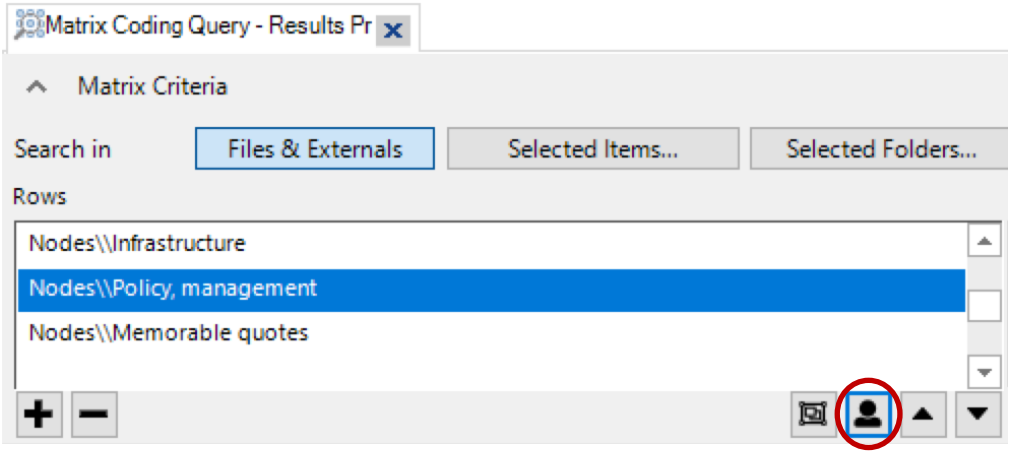
- On **Step 4** of the Wizard, choose whether you want to search text in all your files, or restrict the search to selected items or folders
- On **Step 5** of the Wizard, choose whether you want to run the query just once or add it to your project (and run it). If you choose to add it to your project, you must enter a name. You can optionally enter a description
- Click **Run**

Create a matrix coding query outside the Wizard

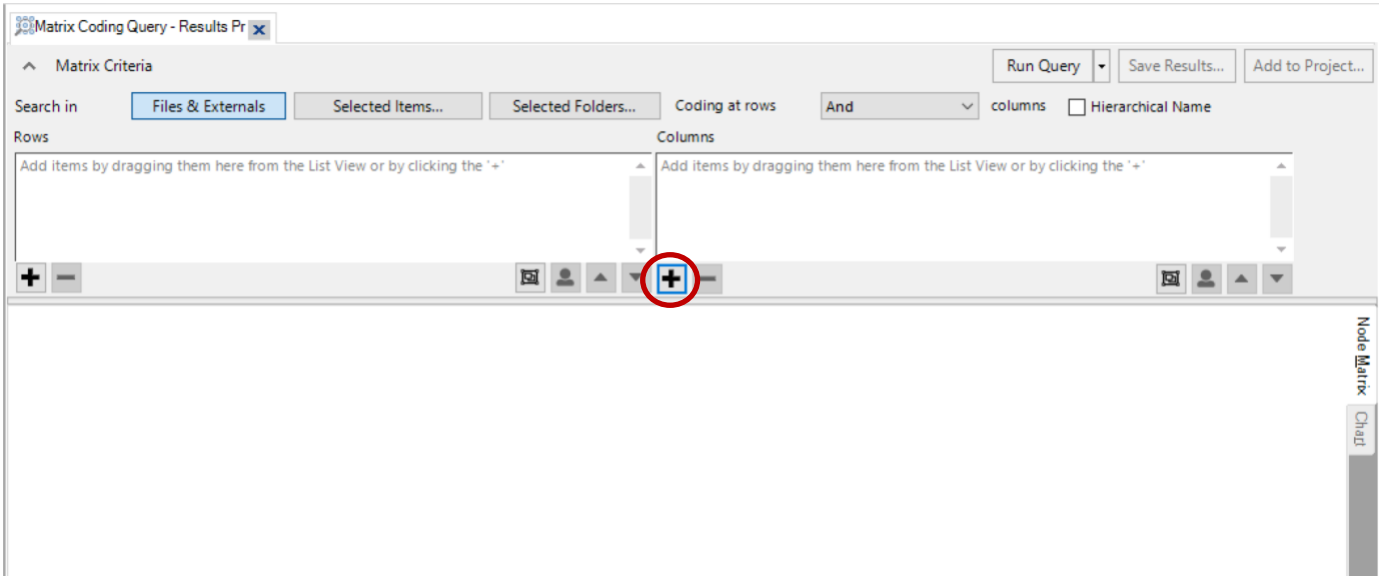
- On the **Explore** tab, in the **Query** group, click **Matrix Coding**
- Select which files you want to use for the query (files and externals, selected items or selected folders only)
- On the **Rows** section, define the rows of the matrix:
    - Click  and then click Select items (e.g. thematic nodes, or cases) or Drag and drop from the list view



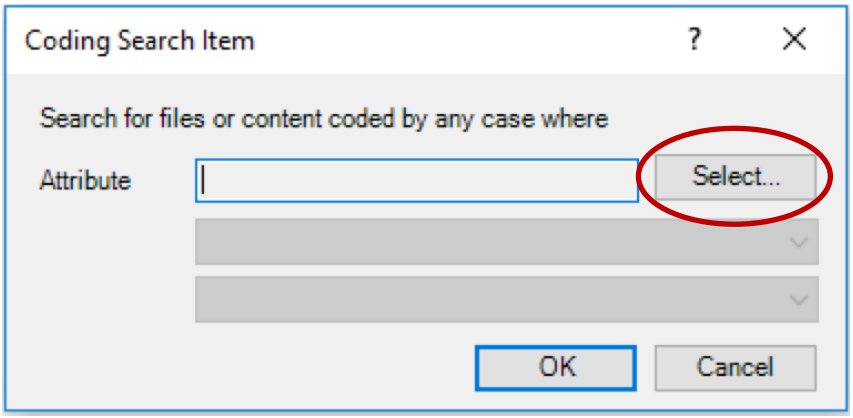
    - (Optional) Once you add the items, if you click on them, you can select coding done by any user or choose only the coding done by specific users—click the  button to select the users



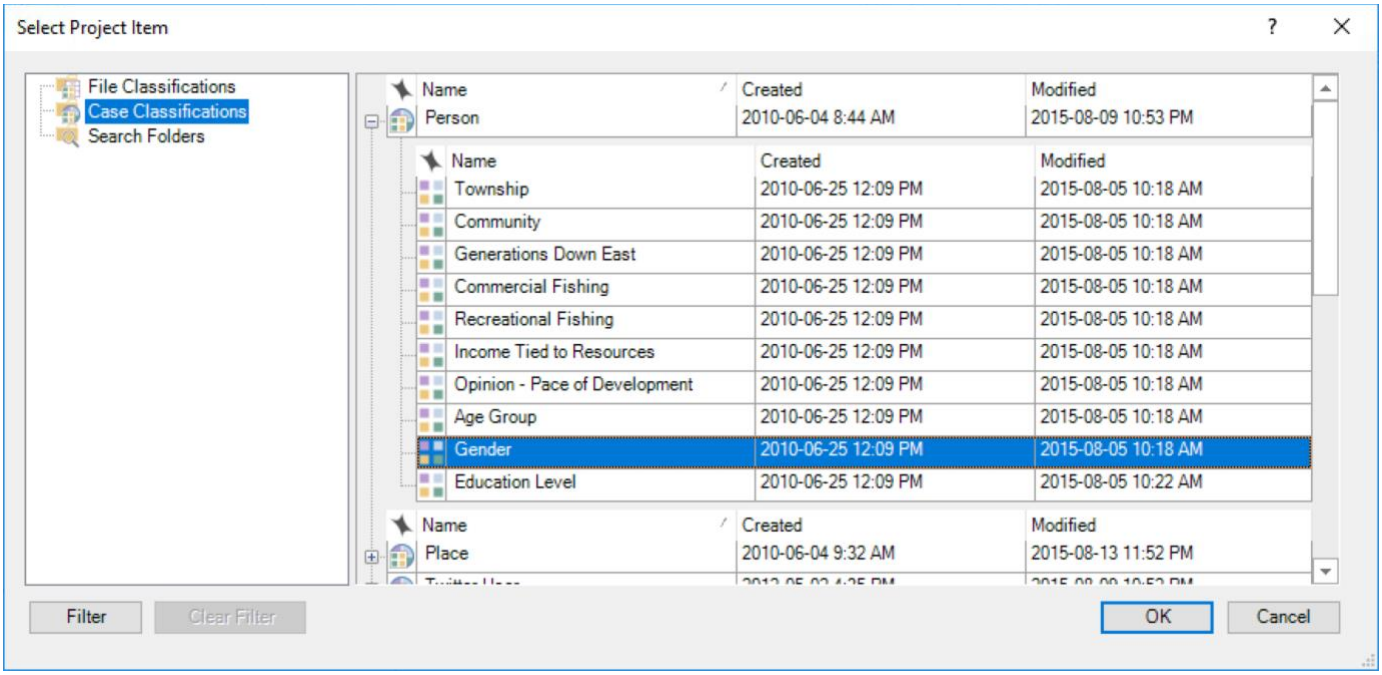
- On the **Columns** section, define the columns of the matrix
    - Click  and then click Select items (e.g. attributes values, in this case, you cannot use the drag and drop function)



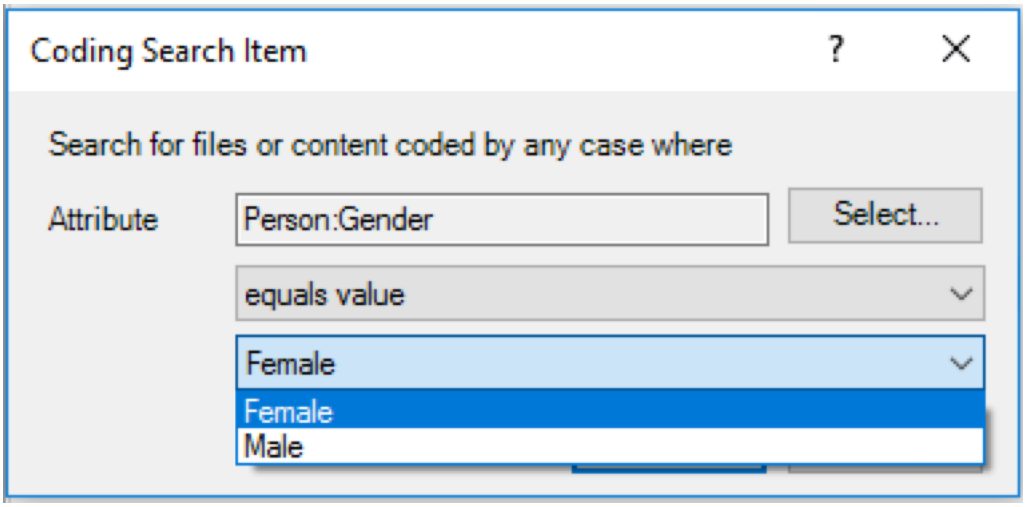
    - Click the **Select attribute values** option. Then click **Select** from the **Coding Search Item** box



- From the **Select project item** box, click **Case Classifications** folder. From here, expand the classification you would like to use (click the ⊞ next to the name of the classification), and select the attribute. Then click OK



- Now you will see the selected attribute on the **Coding Search Item** box. Here, you can change the attribute value on the third drop-down menu (e.g. Female or Male). Then click OK



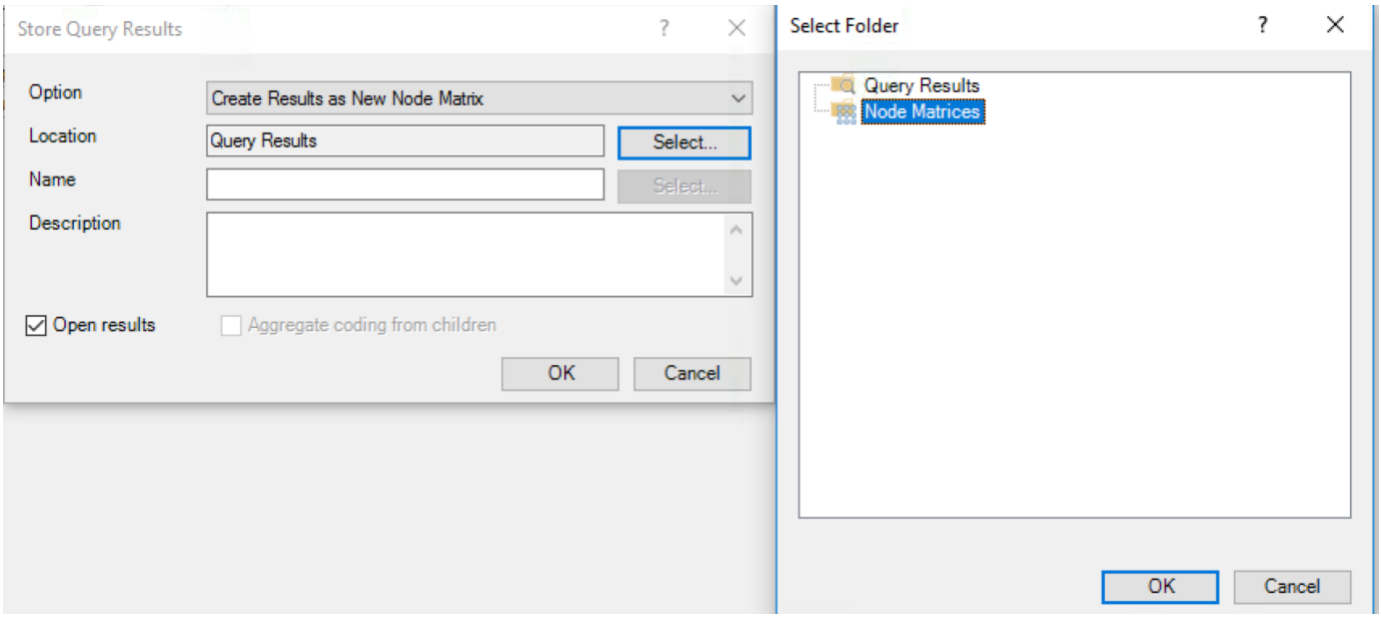
- Now repeat the process to add another attribute value.

- Finally, Click **Run**

Save the preview results as a node matrix

- On the **Matrix** tab, in the **Query** group, click **Store Query Results**

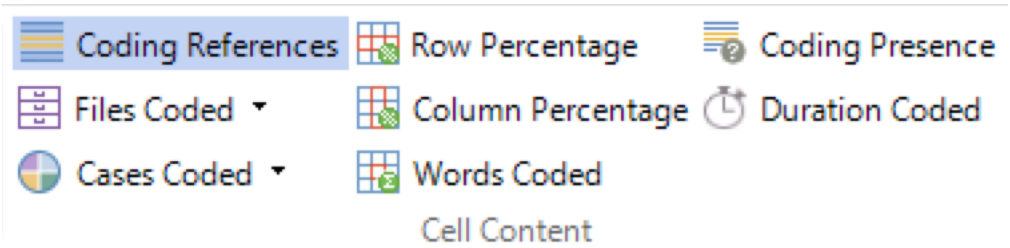
- Click **Select** to change the location where you want to store the results, and select the **Node Matrices** folder. Click OK



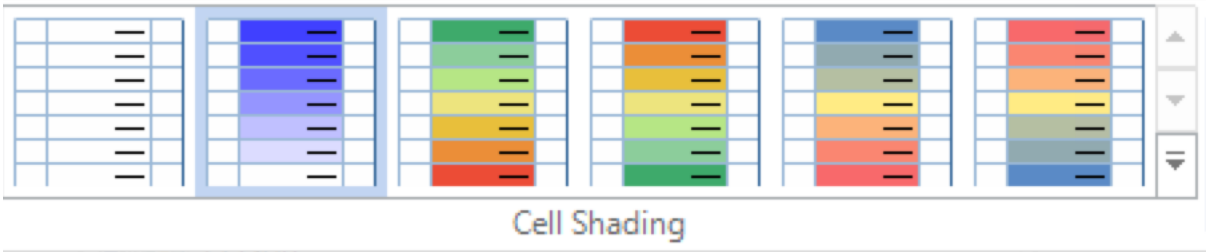
- Enter a name and description
- Click **OK**

Change what information is displayed in the matrix and how it is displayed (e.g., cell shading)

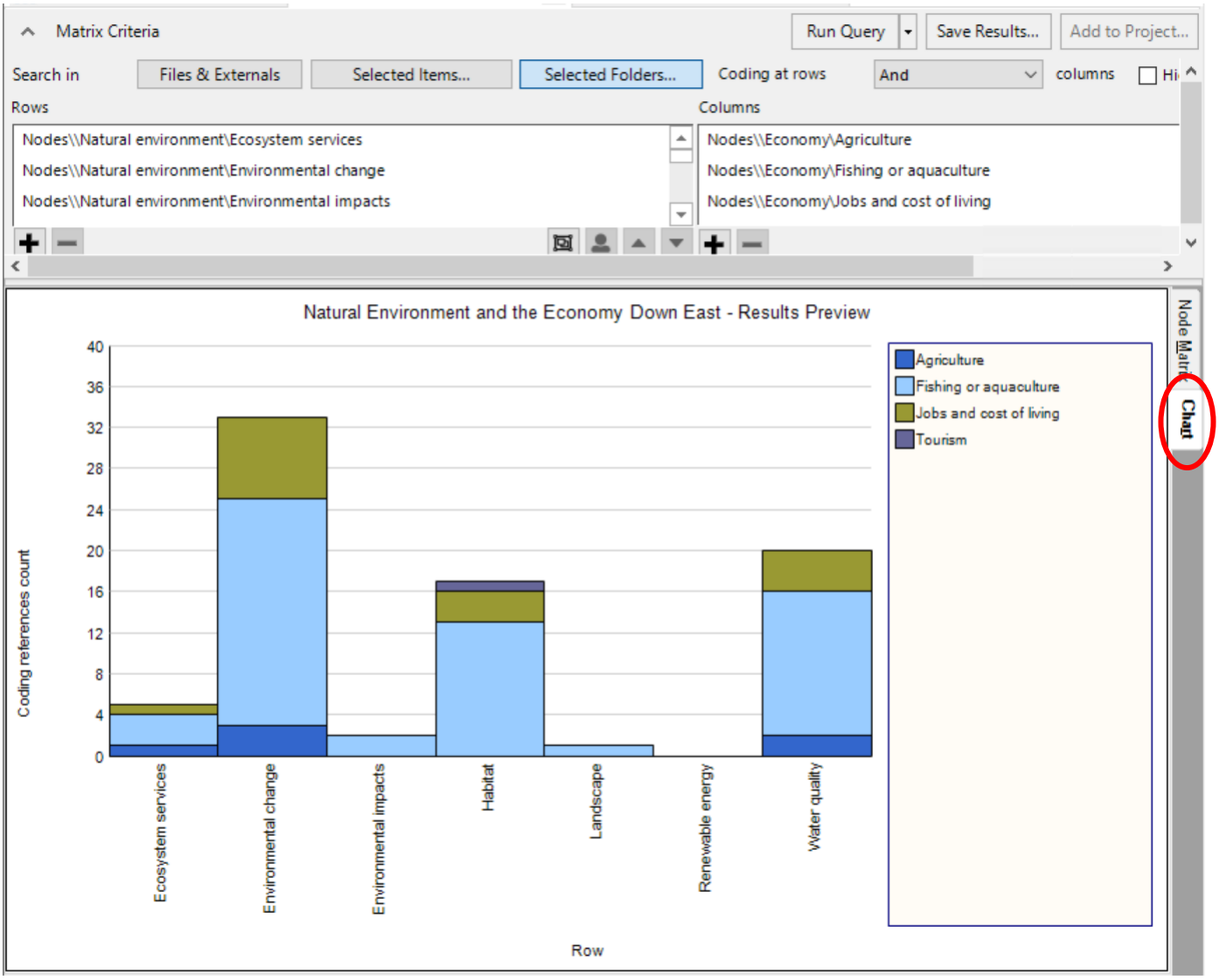
- On the **Matrix** tab, in the **Cell Content** group, select how you would like to display the results



- On the **Matrix** tab, in the **Cell shading** group, select whether you would like to use cell shading

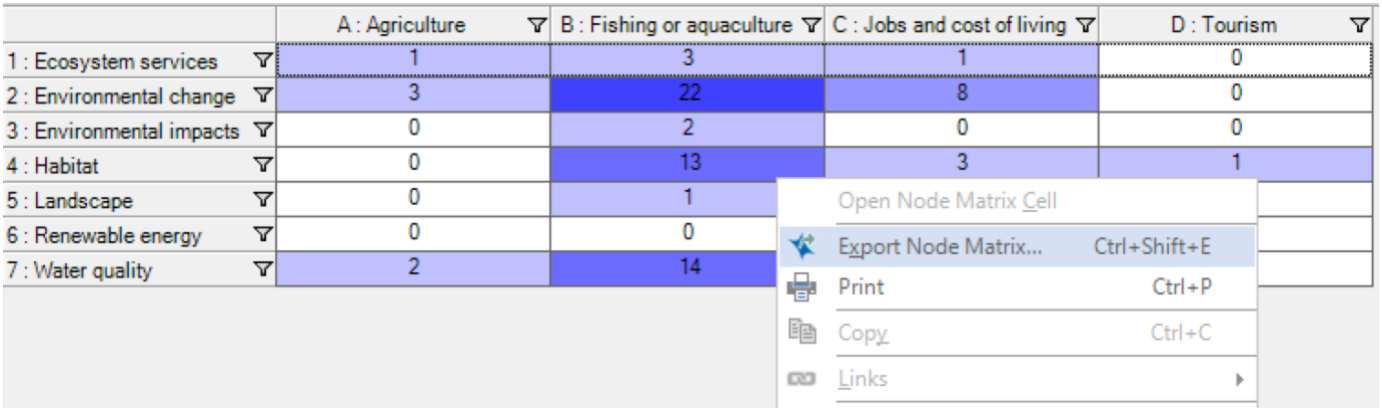


- To Create a chart for your results, click the **Chart** tab on the right side of the node matrix table



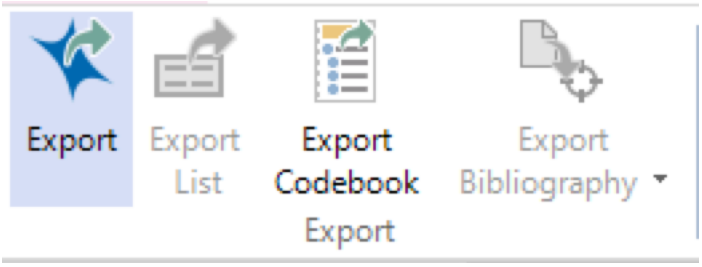
Export results from a Matrix coding query

- Right click on the table, and select **Export Node Matrix** (Choose between SPSS, Excel, or Text)



Or

- On the **Share** tab, select **Export**



Or

- Use the Shortcut **CTRL+Shift+E**

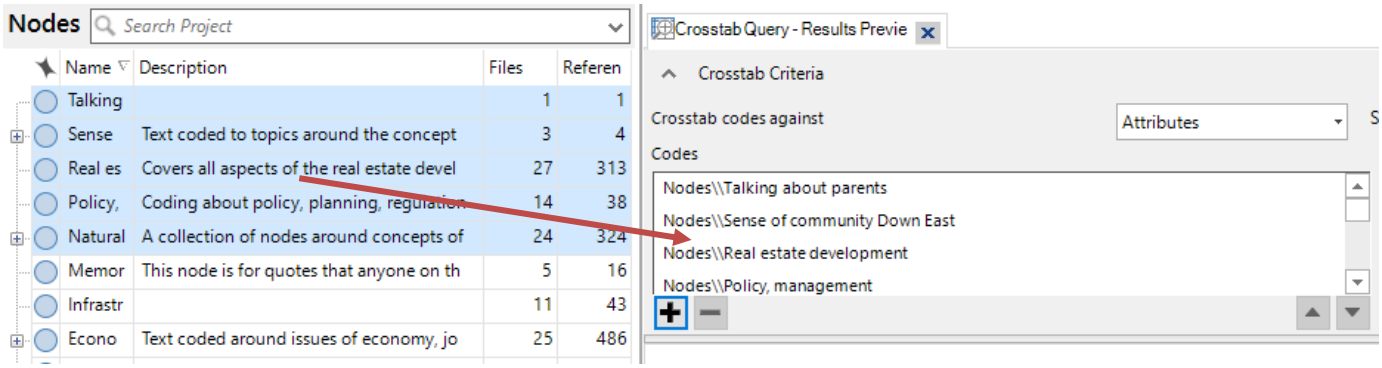
4. Crosstab queries

Create a Crosstab query against attributes

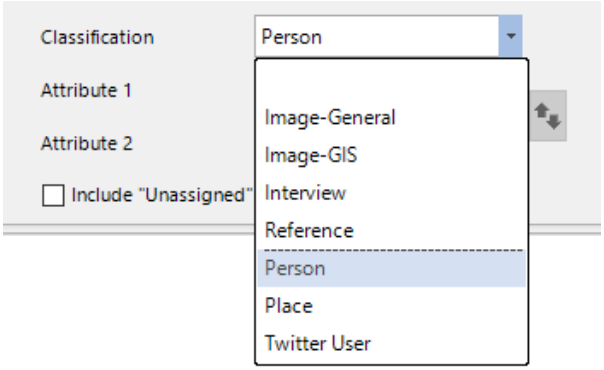
- On the **Explore** tab, in the **Query** group, click **Crosstab**,
- In the **Crosstab codes against** drop-down menu, select **Attributes** (by default, attributes are selected)
- Select which files you want to use for the query (files and externals, selected items or selected folders only)
- On the **Codes** section, define the nodes you want to explore:
    - Click  and then select the thematic nodes

    or

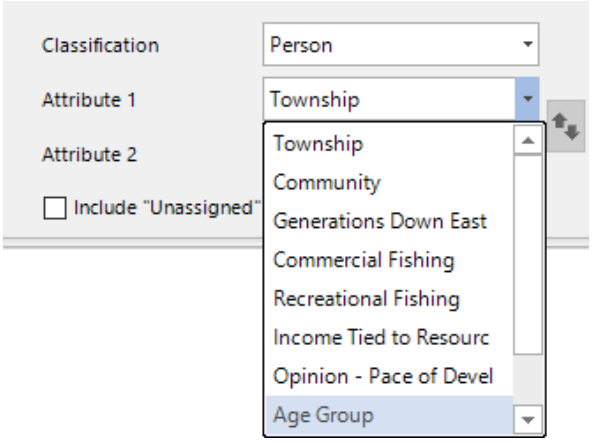
    - Drag and drop from the nodes list view



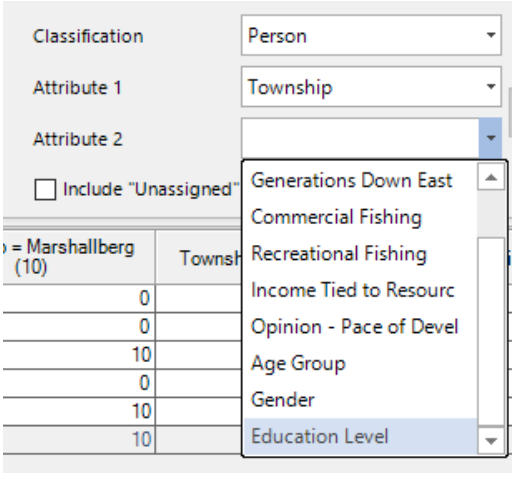
- In the **classification** drop-down menu, select the classification you want to use.



- In the **Attribute 1** drop-down menu, select the first attribute you want to explore



- Optional, in the **Attribute 2** drop-down menu, you can select a second attribute to explore

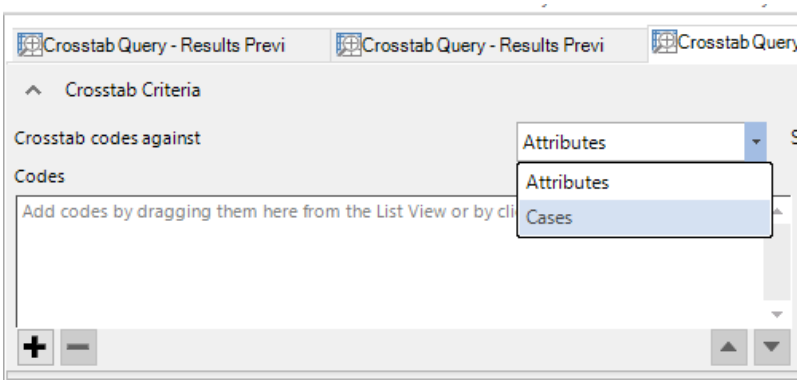


- Click **Run Query**

Create a Crosstab query against cases

- On the **Explore** tab, in the **Query** group, click **Crosstab**

- In the **Crosstab codes against** drop-down menu, select **Cases**



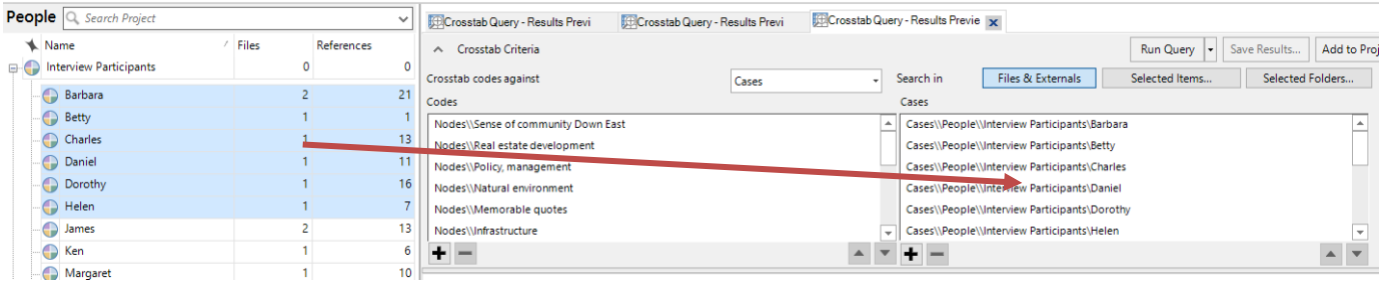
- Select which files you want to use for the query (files and externals, selected items or selected folders only)
- On the **Codes** section, define the nodes you want to explore:
  - Click  and then select the thematic nodes

  or

  - Drag and drop from the nodes list view
- On the **Cases** section, define the cases you want to explore:
  - Click  , click the Cases folder, and then select the cases you want to explore

  or

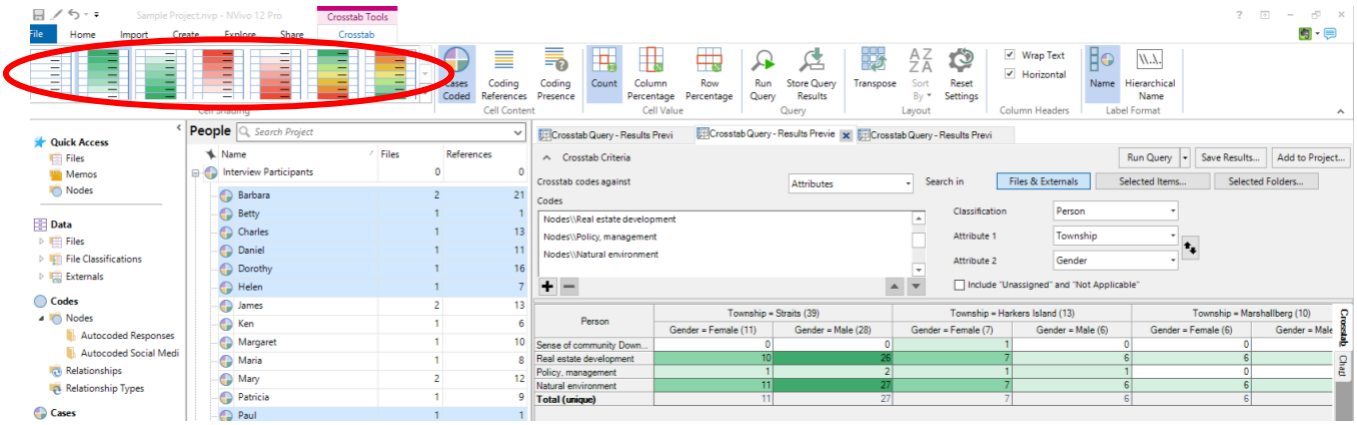
  - Drag and drop from the cases list view



- Click **Run Query**

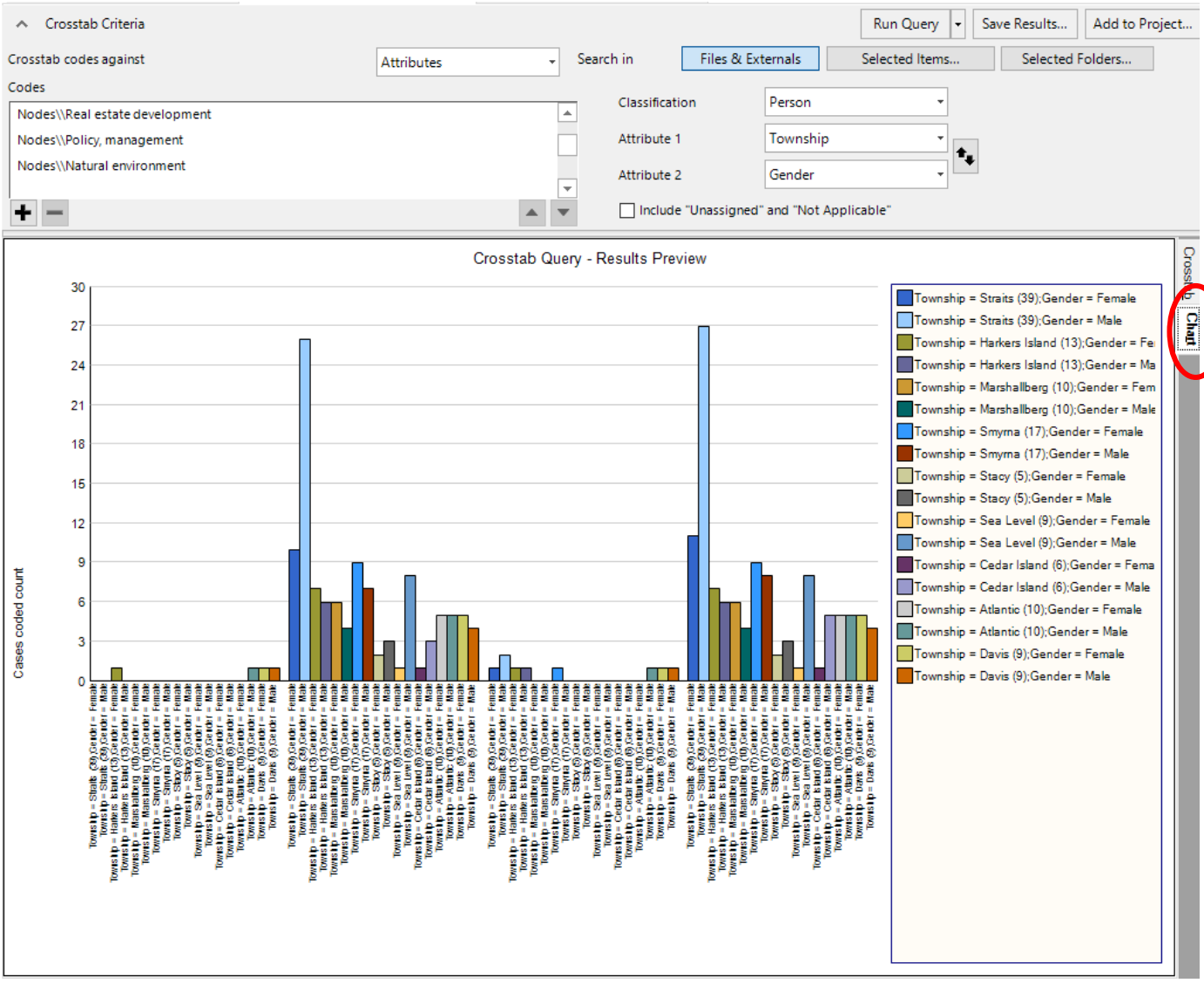
Change what information is displayed in the Crosstab and how it is displayed (e.g., cell shading)

- On the **Crosstab** tab, in the **Cell shading** group, select whether you would like to use cell shading



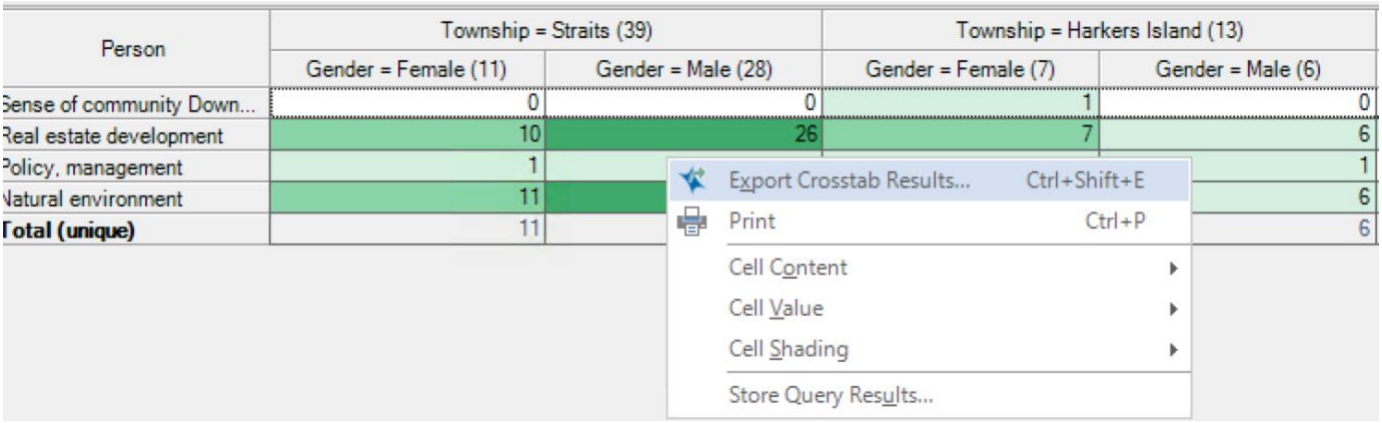
- On the **Crosstab** tab, in the **Cell Content** group, select how you would like to display the results (Coded Cases, Coding References, or Coding Presence)

- To Create a chart for your results, click the **Chart** tab on the right side of the crosstab table



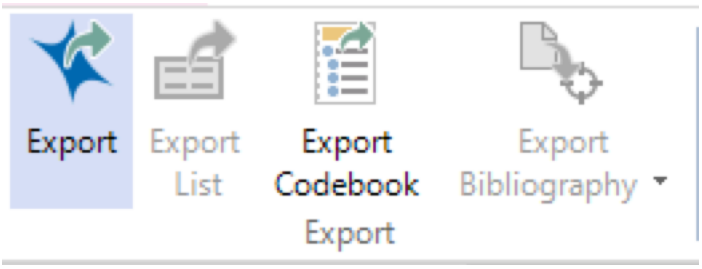
Export results from a Crosstab query

- Right click on the table, and select **Export Crosstab Results** (Choose between SPSS, Excel, or Text)



Or

- On the **Share** tab, select **Export**



Or

- Use the Shortcut **CTRL+Shift+E**

5. Keyboard Shortcuts

Shortcut	**Function**
Creating classifications	
CTRL+Shift+N	Create a new classification (in the Source Classifications or Node Classifications folders)
Adding attributes to classifications	
CTRL+Shift+N	Add an attribute to a classification (when you have selected the classification you want to add the attribute to)
Creating Cases	
CTRL + F6	Code a source at a new Case Node
CTRL + F5	Code a source at an existing Case Node