CREATING CASES

To be able to readily compare across "cases" (e.g., study participants) using NVivo Framework Matrices or Classification Attributes, you can create Cases.
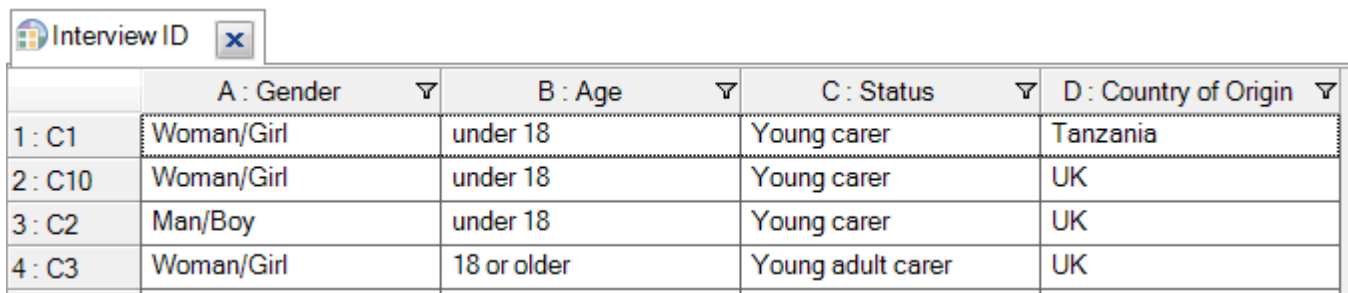
To code Sources to Cases:

1. In the Navigation pane, click Sources.
2. In List View, select the Sources you want to code by Cases.
3. Right-click, and in menu scroll to and hover over Create As then select Create as Cases.
4. Select the Cases folder Cases then click OK.

CLASSIFICATIONS AND ATTRIBUTES

In NVivo, you use Classifications to store descriptive information about your sources or about the people, places or other cases in your project – e.g., demographics or other distinct characteristics – called Attributes. You can then use this information to make comparisons or to gather material by Attribute. This topic gets you started with Classifications— more at bit.ly/29KVBOr. While Source and Case Classifications behave in a similar way, they are used for different purposes:

• Use Source Classifications to store bibliographical information about your sources—you can import this information from reference management tools like EndNote or Zotero. NVivo also provides the predefined classifications interview and focus group to help you keep track of your sources—you can add these to your project or create your own general classifications.

• Use Case Classifications to provide demographic details about the people, places or other 'cases' in your project. For example, classify interview subject cases and define attributes for age and country of origin.

Interview ID	A : Gender	B : Age	C : Status	D : Country of Origin
1 : C1	Woman/Girl	under 18	Young carer	Tanzania
2 : C10	Woman/Girl	under 18	Young carer	UK
3 : C2	Man/Boy	under 18	Young carer	UK
4 : C3	Woman/Girl	18 or older	Young adult carer	UK

CLASSIFICATION SHEETS

A Classification Sheet is a grid that displays the attributes for all items in a particular classification. While you can create Classification Sheets within NVivo, I advise creating the classification sheet in Excel and then importing it into NVivo. **IMPORTANT:** Your identifiers in your first column of your classification sheet ***must exactly match*** the source/node to which that classification is to be attached in NVivo. For example, if you have Cases that are named Mandy, Jo, Patrick, and Jacob, then the Case Classification sheet with rows for those interview subjects and their attributes must be labeled in the first column as Mandy, Jo, Patrick, and Jacob.

Importing a Case Classification Sheet:

1. In the Navigation pane, click Classifications.
2. At top left-hand side of screen, select the appropriate classification type (Source Classifications or Case Classifications).
3. Right-click in white space of main part of screen, and then select Import Classification Sheets.
4. In Import Classification Sheets Wizard box, click Browse and upload your Excel classification sheet file, then click Next button.
5. Make sure the correct classification type is displaying in the dropdown, then click Next button.
6. **IMPORTANT:** Click radial button next to As names, and use the Select button to point to the folder in which the items (Sources or Cases) you are wishing to attach the Classification sheet to is located, then click Next button.
7. Click Finish button.

Your classification sheet should then display in NVivo. You can then sort and filter the columns of the classification sheet as needed. Check to be sure it was successfully attached to the appropriate project items two ways:

1. Right-click on one of the items (e.g., Sources or Cases), in menu scroll to Classification, and see if the title of the Classification is showing up with a check mark next to it. If so, you did it!

2. To see the classification Attribute Values connected with that particular project item, right-click on it, click on its Properties option in the menu, then in the Properties window click the Attribute Values tab.

ADVANCED FIND AND CREATING SETS

The Advanced Find allows you to search for specific criteria and then you can store those results as a Set to use for comparisons later (e.g., matrix coding queries with cross-sections of demographic attributes).

Using an Advanced Find Search to Create a Set:

The below example uses the "Environmental Change Down East (Sample Project.nvp) project that comes with every installation of NVivo to create a Set of females age 40-49.

1. On the Ribbon at top of screen, click the Query tab and then click Advanced Find icon at far left.
2. Set the Search Criteria to Nodes (from the dropdown menu) and select the Advanced tab.
3. From Define more criteria section, select Attribute from the Interaction dropdown menu.
4. Expand Person (click the plus sign), select the Gender attribute, and click OK button.
5. Choose Female from the value box. (Make sure the Option box is set to "equals value".)
6. Click Add to List. Don't click OK button yet!
7. Repeat step 3 above, then expand person and select Age Group.

8. Scroll to 40-49, and click Add to List.
9. Click Find Now button, then close Advanced Find window.
10. Select the items in List View (use Shift or Ctrl keys to select multiples), right-click on the selection, hover over Create As and then click Create as Set.
11. Enter name for the set and click OK button.
12. In the Navigation Pane, click on Collections and you will see the Sets folder with the new Sets you created listed.

FRAMEWORK MATRICES

Framework matrices provide a way to summarize or condense your source materials in a grid that has rows for case nodes (for example, Authors) and columns for theme nodes. Each cell in the grid represents the intersection of a case and theme—when you enter text into the cell you can type your own summary of the source content relevant to that case and theme, or you can also have it "auto summarize" to bring the coded references into the framework matrix grid.

Create a new Framework Matrix:

1. On the Create tab, in the Sources group, click Framework Matrix.
2. The New Framework Matrix dialog box opens.
3. Enter a name for the matrix, and optionally enter a description.
4. On the Rows tab, under Rows, click the Select button and then select the Cases that will be the rows in your matrix.
5. On the Columns tab, click the Select button, and then select the thematic nodes that will be columns in your matrix.
6. Click OK.
7. On the Analyze tab, in the Framework Matrix group, click Auto Summarize to have the coded references import into the matrix grid.

QUERYING YOUR DATA – CODING AND MATRIX CODING QUERIES

A query is a powerful way to examine your data for trends, patterns, and other meaningful relationships in your research. **Always save your Query to your project** to easily re-run it later – and you can change it by clicking Queries in the Navigation pane, right-clicking on the query, and selecting Query Properties.
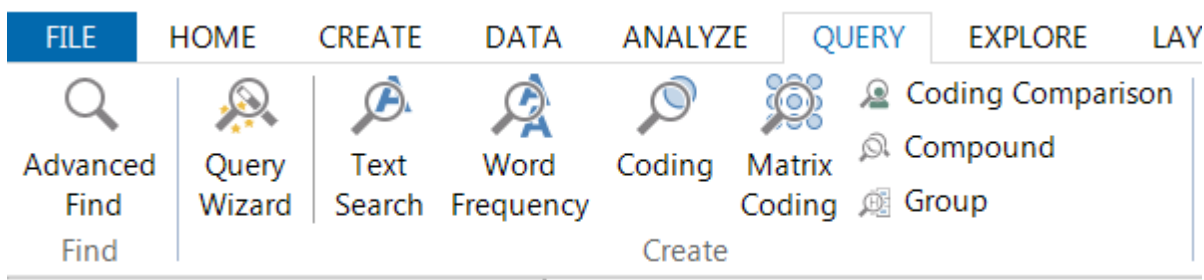
CODING QUERY

A Coding Query allows you to sort through the data that you have coded to search for particular patterns in your coding.

Run a Coding Query:

1. On the Query tab, in the Create group, click Coding. A new blank query opens in Detail View.
2. Choose where you want to search for coding:
- All sources—search for content in all the sources in your project, including externals and memos
- Selected Items—restrict your search to selected items (for example, a set containing interview transcripts)
- Selected Folders—restrict your search to content in selected folders (for example, a folder of interview transcripts)
3. By default, the query will look for content where All of the rows of criteria are met. Select Any if you want content that meets only some of your criteria.
4. Define your criteria. You can find content that is coded at (or not coded at):
- All Selected Nodes—find content that is coded at one or more nodes you specify. For example, find content coded at the node economy, or you might choose to find content that has been coded at the nodes negative and natural environment—this option uses the AND operator. Click the button to select the node.
- Any Selected Node—find content coded at any of the nodes you specify. For example, find content that has been coded to any of the nodes habitat, forest or landscape—this option uses the OR operator. Click the button to select the nodes.

- Any Case Where—find content coded at cases with specific attribute values. For example, you could search for content coded at males aged 25-35. Click the button to select the attribute values.

5. (Optional) In the Spread to list, define the spread coding options (amount of coding spread around the search word).

6. Click the Run Query button.

MATRIX CODING QUERY

A Matrix Coding Query allows you to compare types of items and display them in a table, which enables you to ask a variety of questions and identify patterns in your data. For example, you might use a matrix query to compare similarities/differences between what various demographic groups have to say about the same attitude/issue.

Run a Matrix Coding Query using Query Wizard:
1. Click Query tab in screen ribbon, then click Query Wizard.

2. Click radial button next to "Cross-tabulate how content is coded," then click Next button.

3. Choose what you would like in the rows of your matrix coding table by clicking Add Selected Items button (e.g., select specific Attribute Values to compare, such as one row for each for different age groups) then click Next button.

4. Now choose what you wish to appear in the columns of your matrix coding table (e.g., use Add Selected Items to select specific theme nodes to compare across age groups), then click Next button.

5. Select what Project items to query, and click Next button.

6. Choose whether to run the query just once or to add to your Project to run in the future as you add new Sources, then click Run button.

	A : Mixed	B : Negative	C : Neutral	D : Positive
1 : Person:Age Group = 30 - 39	0	12	0	13
2 : Person:Age Group = 40 - 49	4	48	5	51
3 : Person:Age Group = 50 - 59	7	89	5	80
4 : Person:Age Group = 60 - 69	11	72	6	67

VISUALIZATIONS – look along the right-hand side of your Matrix Code Query results at the tabs for visualization option:

• *Chart* – You can make changes to the chart type, title, labels, gridlines, and rotation by clicking the Chart tab in the screen Ribbon.

RE: CELL CONTENT OF A MATRIX CODE TABLE
Double-click to open results of cell.
Right-click to:
- change displayed cell content – options discussed here: bit.ly/29DKmEe
- export to Excel for statistical computations
- add shading to cells

DATA VISUALIZATION

Located on the Explore tab, NVivo has a number of methods for visualizing your findings. You can create a variety of charts, graphs, and dynamic and static models, and NVivo has helpful Wizards to walk you through the steps.
- *Maps* – Use **Mind Maps** to brainstorm your ideas and visualize your thoughts and visually create Node hierarchies, or **Concept Maps** to map out your ideas or to explore and present the connections in your theories, or **Project Maps** to explore and present the connections in your data.
- *Charts* – create a chart based on a node, node matrix, or another source. You can choose from a variety of charts including 3D bar, column, and others.
- *Hierarchy Charts* – visualize a hierarchy, helping you to see patterns in your coding or view the attribute values of cases and sources.
- *Cluster Analysis* – visualize patterns in your project by grouping sources or nodes that share similar words, similar attribute values, or are coded similarly by nodes.
- *Comparison Diagram* – compare two of the same type of project items—for example, sources, nodes or cases—to see their similarities and differences.
- *Explore Diagram* – focuses on a single project item, showing all of the items connected to that item. The diagram is dynamic, allowing you to step forward and back through your project data to explore the connections between items.

GENERATING REPORTS

Reports contain information about your project that you can view and print. For example, you could run a Coding Summary by Node report to review the content coded at each node (organized by source). An NVivo project file has many ready-made reports available, but you can also create and generate custom reports to fit your specific needs.

Run a Ready-Made Report:

1. In Navigation View, click Reports, and then click the Reports folder.

2. In List View, double-click the report you want to run.

3. The report results are displayed in Detail View.

Creating a Custom Report:

1. Click the Explore tab in the screen Ribbon, click New Report at far left, and click New Report via Wizard.
2. Follow the steps of the Report Wizard

RESEARCH TEAMS

Here are some helpful tips for facilitating teamwork in NVivo:
- It is recommended that all team members use the same version of the software – i.e., everyone should be using either the Windows version or the Mac version, not a mixture.
- The simplest way for team members to collaborate on a standalone project is to work with a single project file—however only one user can open and work with the project at any point in time.
- If more than one user wants to work on a project at the same time, you can establish a 'master' project file, and then give a copy of the master project file to each team member. The team members work in the copied project files separately. Then, at regular intervals, the team leader should import team members' separate copied project files into the master project file
- Each team member should have their own user profiles in the project designated by consistent initials used at all times
- There are various ways to track team members' work in NVivo
- You can run Coding Comparison queries to compare coding done by two users (or two user groups) to measure the 'inter-rater reliability' or degree of agreement for coding between the users—