

HOW TO USE THE BISE NVIVO DATABASE

Running Matrix Queries, Running Coding Queries,
and Creating Sets

Terms and Definitions

The BISE Coding Framework refers to codes that are applied to the entire report as well as codes that are tied to specific text within a report. NVivo also uses these categories, but has different terms for them.

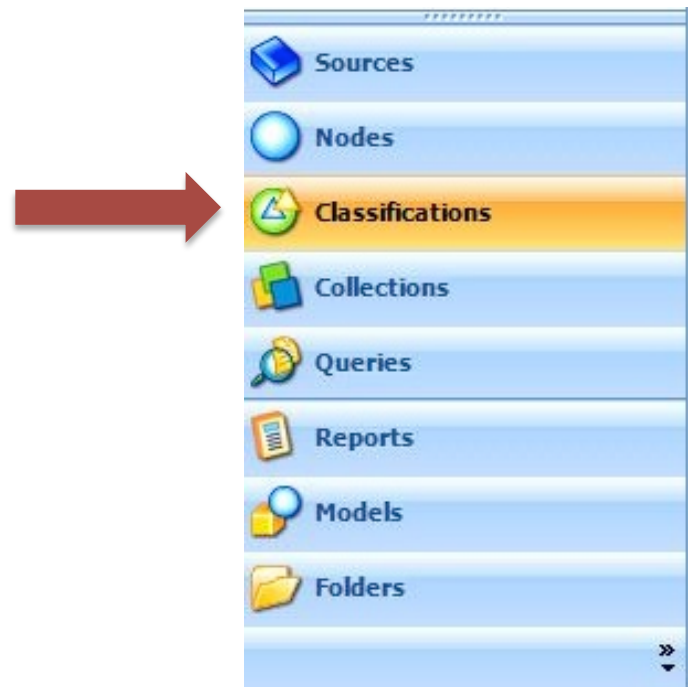
BISE Coding Framework	NVivo	Examples
Report Level Code	Attribute	Evaluation Type, Evaluand, Sample Size
Within Report Code	Node	Evaluation Questions, Recommendations

The list of BISE codes is found on page 3 of the Coding Framework document. The majority are Report Level Codes (Attributes), but those marked with an asterisk are also Within Report Codes (Nodes).

Attributes “live” in the “Classifications” menu in NVivo, and Nodes “live” in the “Nodes” menu.

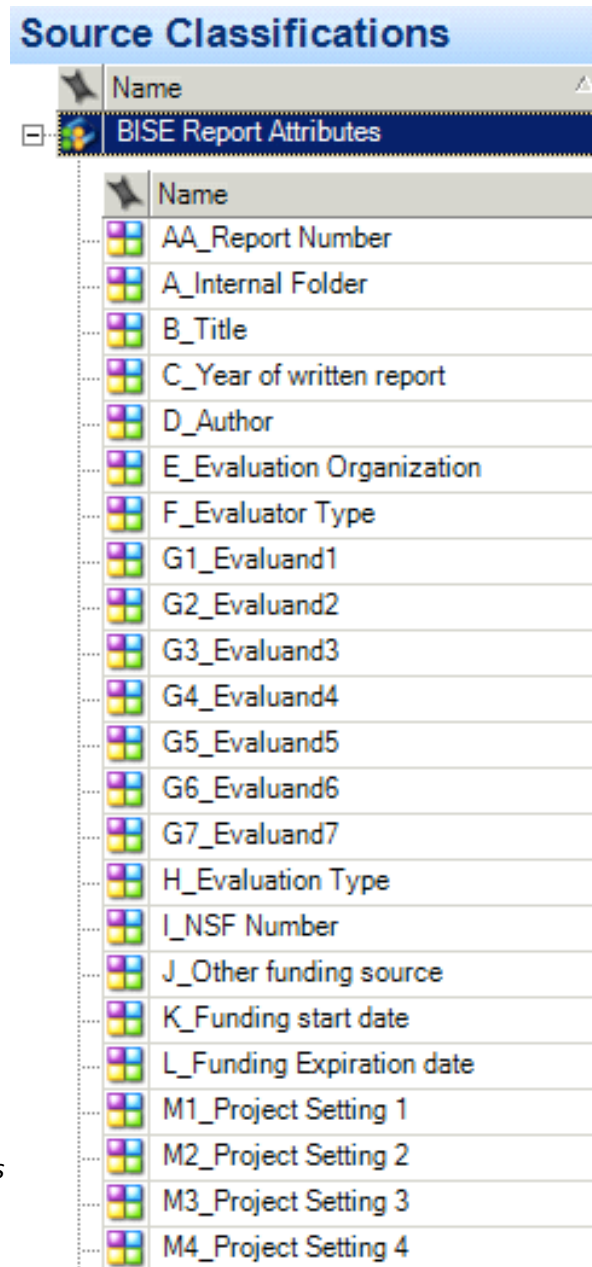
Visualizing Attributes

Let's say you want to answer the question,
"How many summative evaluations are in the BISE Database?"



To answer this question you would need to look at the code "Evaluation Type," which is a report level code. Report level codes are found in the NVivo attributes. Upon opening NVivo, select "Classifications" from the menu bar along the right hand side of the window.

You will see one item titled "BISE Report Attributes."
Click on the plus sign* to the right to expand the item.



**Note: The plus sign is used to expand all item trees in Nvivo. Clicking the minus sign will collapse them.*

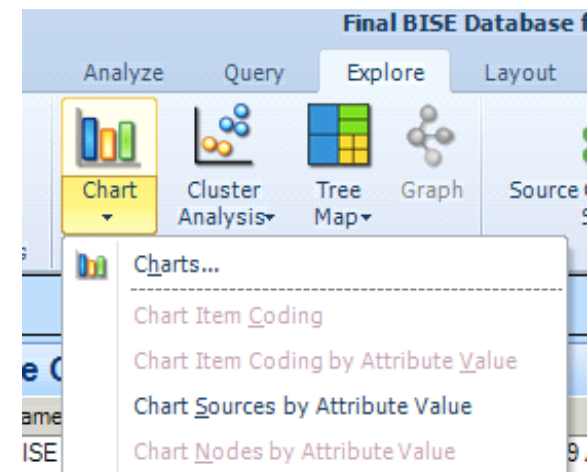
Find and click on the attribute you are interested in. In this case, "H_Evaluation Type."

G6_Evaluand6	Text	7/6/2014 10:59 AM
G7_Evaluand7	Text	7/6/2014 10:59 AM
H_Evaluation Type	Text	7/6/2014 10:59 AM
I_NSF	Text	
J_Oth	Text	
K_Fun	Text	
L_Fun	Text	
M1_Pr	Text	
M2_Pr	Text	
M3_Pr	Text	
M4_Pr	Text	7/6/2014 10:59 AM
M5_Pr	Text	7/6/2014 10:59 AM
N_San	Text	7/6/2014 10:59 AM
O_Acc	Text	
P_Lan	Text	
Q_Instruments provided	Text	
R1_Interview protocol instrument	Text	
R2_Survey instrument	Text	
R3_Observation instrument	Text	
R4_Timing & Tracking instrument	Text	
R5_Focus group protocol instrument	Text	
R6_Other instruments provided	Text	
S1 Statistical Tests 1	Text	7/6/2014 10:59 AM

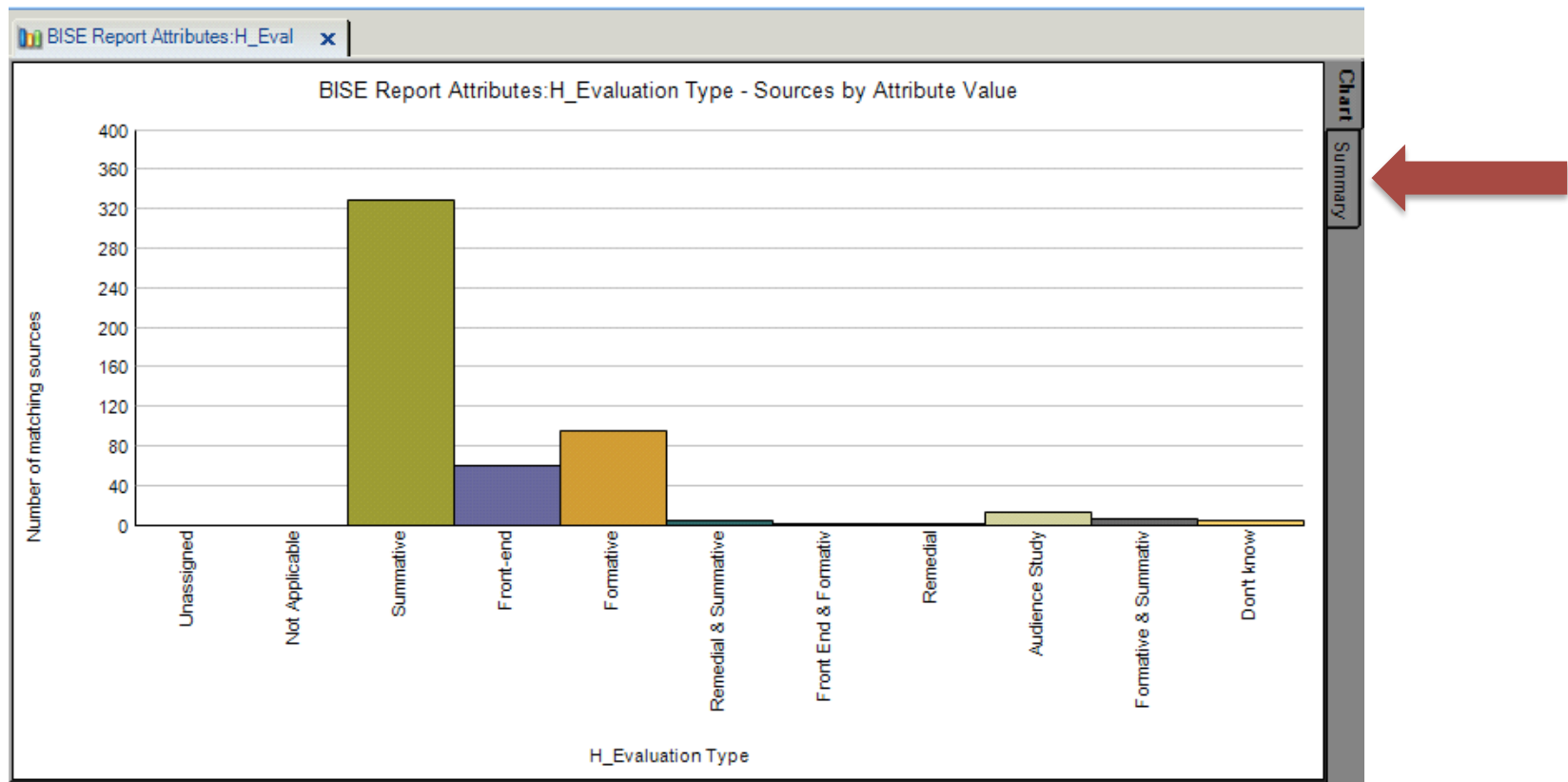
Right click on the desired attribute. Select "Visualize" from the menu (Second from the bottom) and then "Chart Sources by Attribute Value"

- Import Attribute Values...
- Export
- Print List...
- Cut Ctrl+X
- Copy Ctrl+C
- Delete Del
- Move Up Ctrl+Shift+U
- Move Down Ctrl+Shift+D
- Visualize
- Attribute Properties... Ctrl+Shift+P
- Chart Item Coding
- Chart Item Coding by Attribute Value
- Chart Sources by Attribute Value
- Chart Nodes by Attribute Value
- Cluster Analysis of Items...
- Tree Map of Attribute Value Combinations
- Graph

Alternatively, you may select "Chart" from the "Explore" tab on the ribbon, and then select "Chart Sources by Attribute Value."



The results will be shown as a bar chart. Hovering over each bar will show the number of sources for each category. You can also select the "Summary" tab at the right for a table presentation.



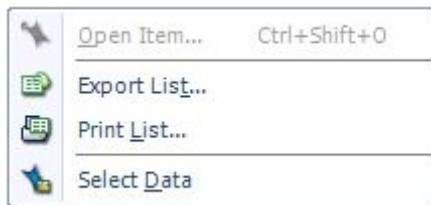
When you are viewing the chart, there are options to change the title, type of chart, and adjust other options for the X and Y axes (such as adding data values) located in the Chart tab before saving the file.

Question: How many summative evaluations are in the BISE Database?

H_Evaluation Type	Number of matching sources
Unassigned	0
Not Applicable	0
Summative	329
Front-end	81
Formative	96
Remedial & Summative	5
Front End & Formative	1
Remedial	2
Audience Study	14
Formative & Summative	7
Don't know	5

+ -----

Answer: 341 Summative evaluations are in the database

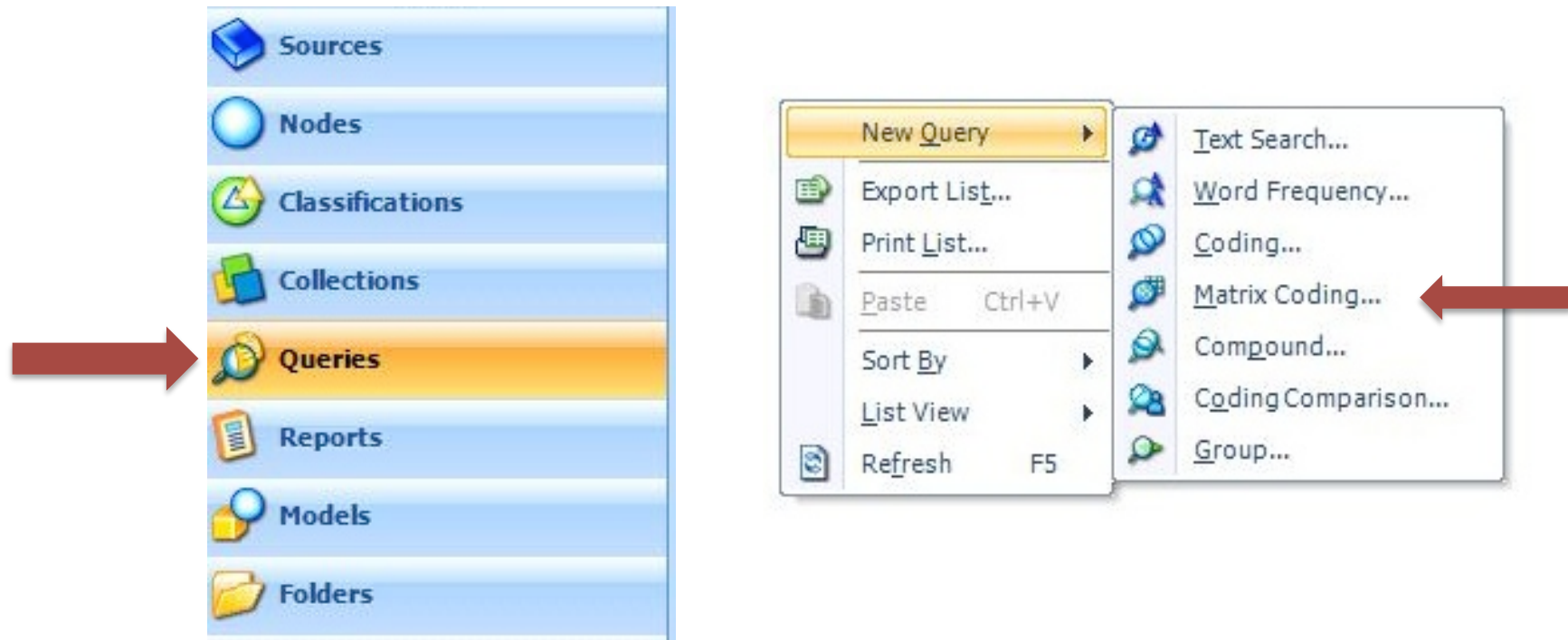


To export, right click on either the chart (as a graphic) or in the white area below the data on the table view. You may also use the keyboard command “Ctrl+Shift+E.”

Attribute x Attribute Matrix Query

Now let's say you want to answer the question,

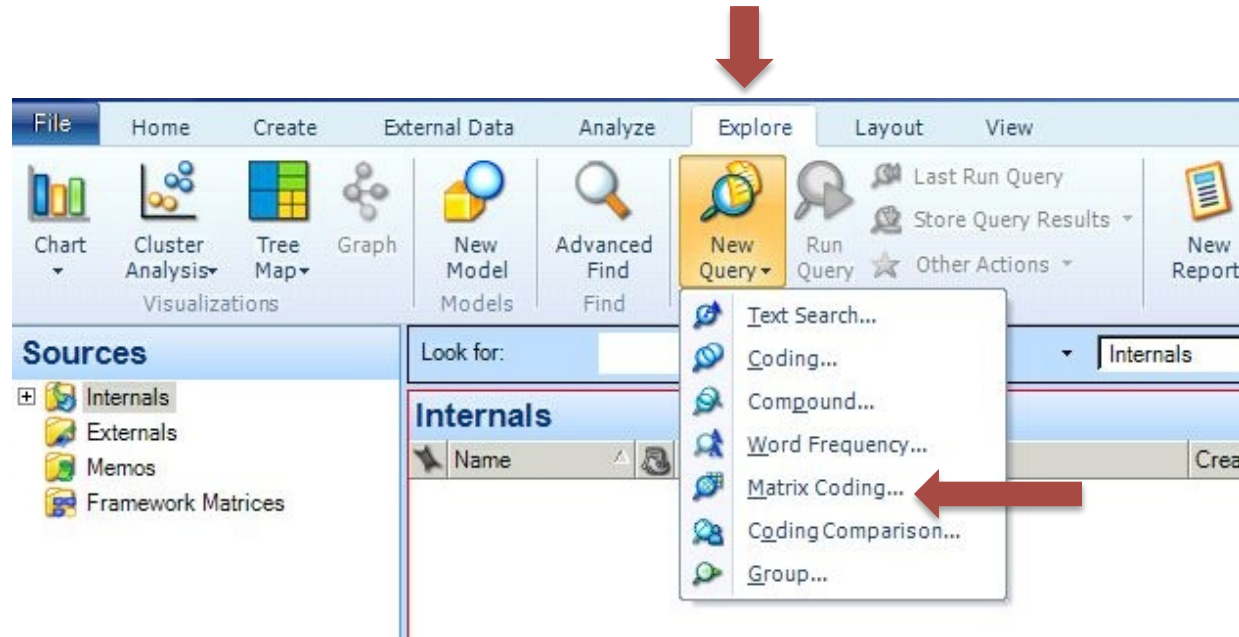
"How many summative evaluations of exhibitions are in the BISE Database?"



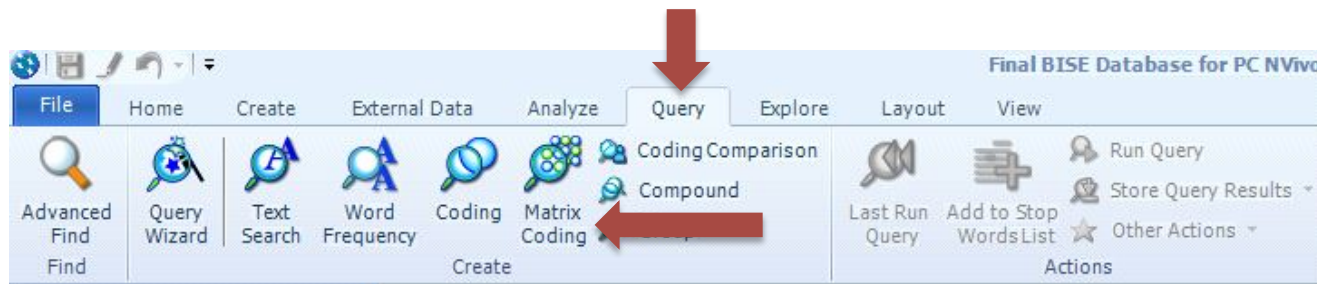
To answer this question you need to run a query. Upon opening NVivo, you can access the query functions one of two ways: 1) Select "Queries" from the menu bar along the left hand side of the program window. Then right click in the work area to access the options menu. Access to these options by right clicking is only available when in the Query workspace.

2) For Nvivo 9, you can select the “Explore” tab on the ribbon, then click “New Query,” and make your selection from the options provided in the drop down. In NVivo 10, queries have their own tab in the ribbon. In this case, we’ll be doing a “Matrix Coding Query.” You may access the query menu regardless of which version of NVivo you are in.

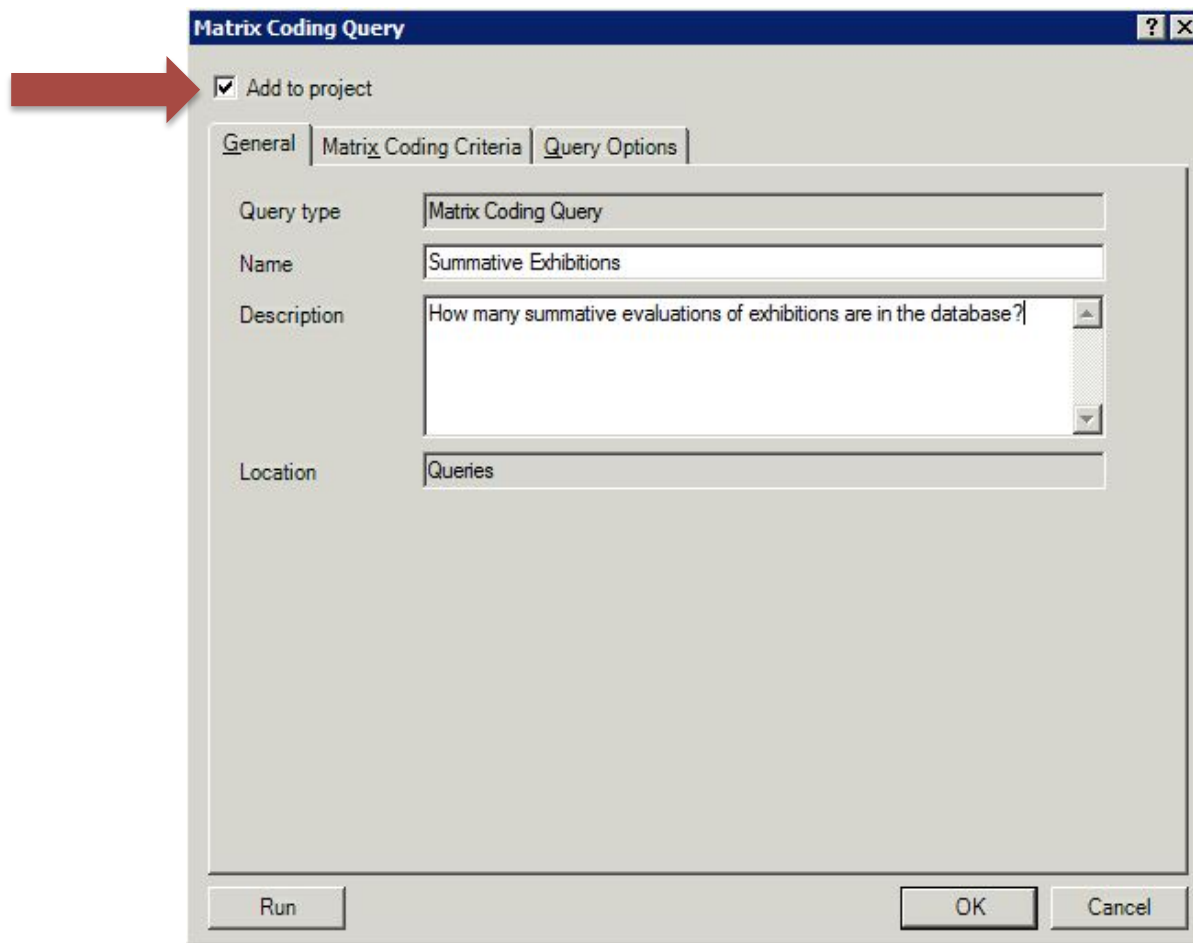
NVivo 9



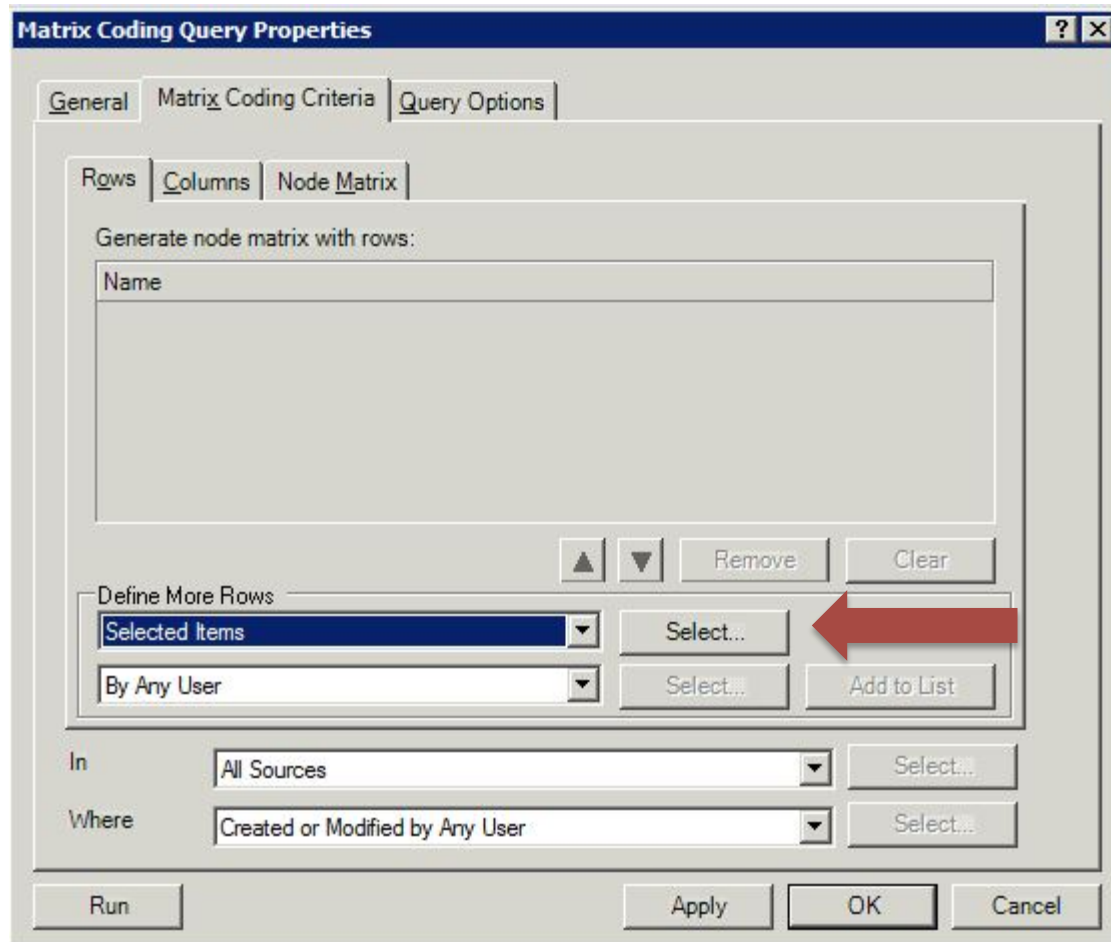
NVivo 10

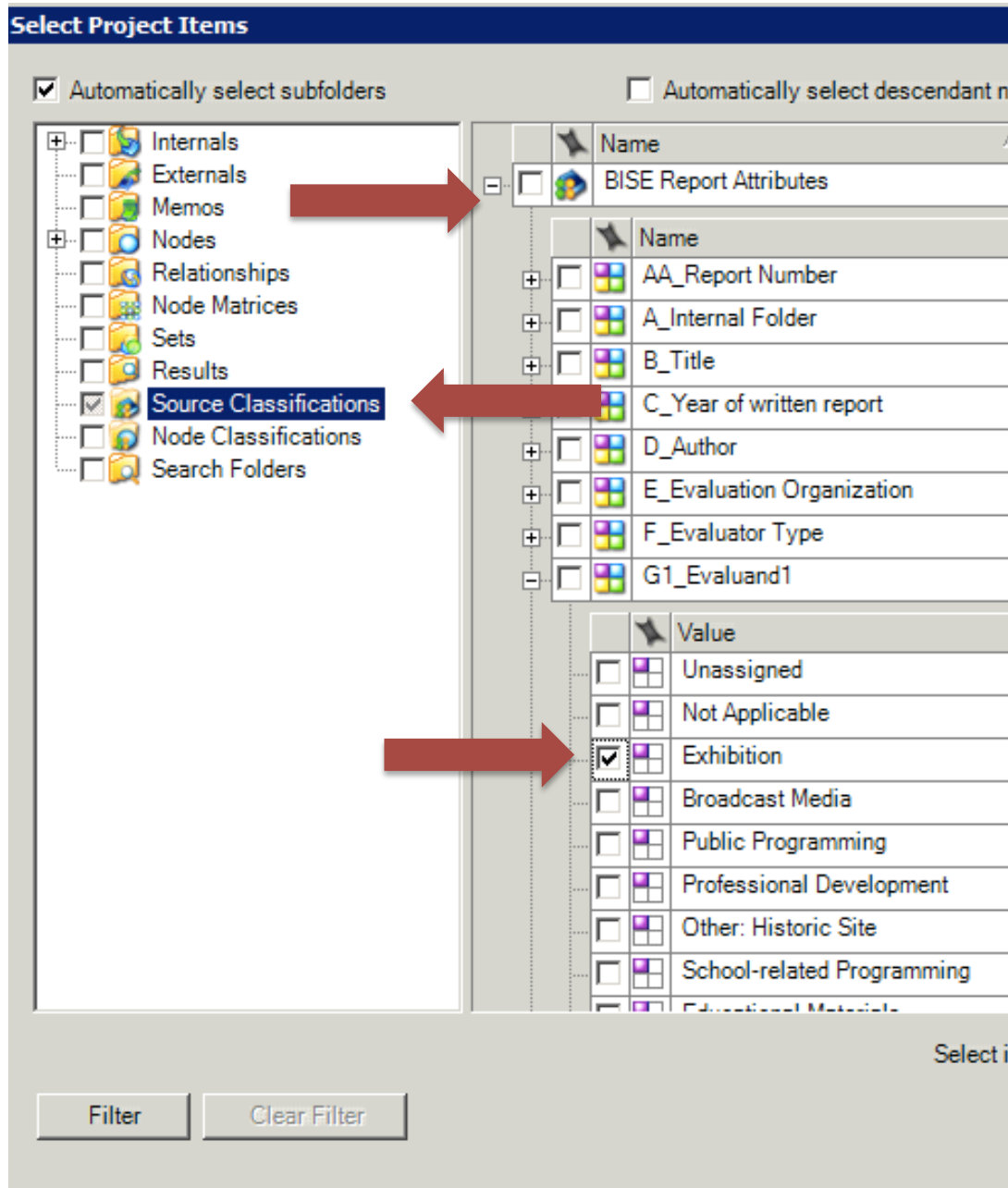


After you open a new query, a dialog box will open up. The dialog box will initially have two tabs: “Matrix Coding Criteria” and “Query Options.” Checking the box “Add to Project” will create a third tab “General.” This is where you can name your query specifications so they are saved in the NVivo Project. The “Name” field is required. Description is optional, but will only be visible when examining the query properties.



Next, click the “Matrix Coding Criteria” tab. Think of a Matrix Query as a cross table. First, define the rows by clicking “Select” next to the dropdown menu where “Selected Items” is displayed. This is the default option for row definition (and suitable for our task).



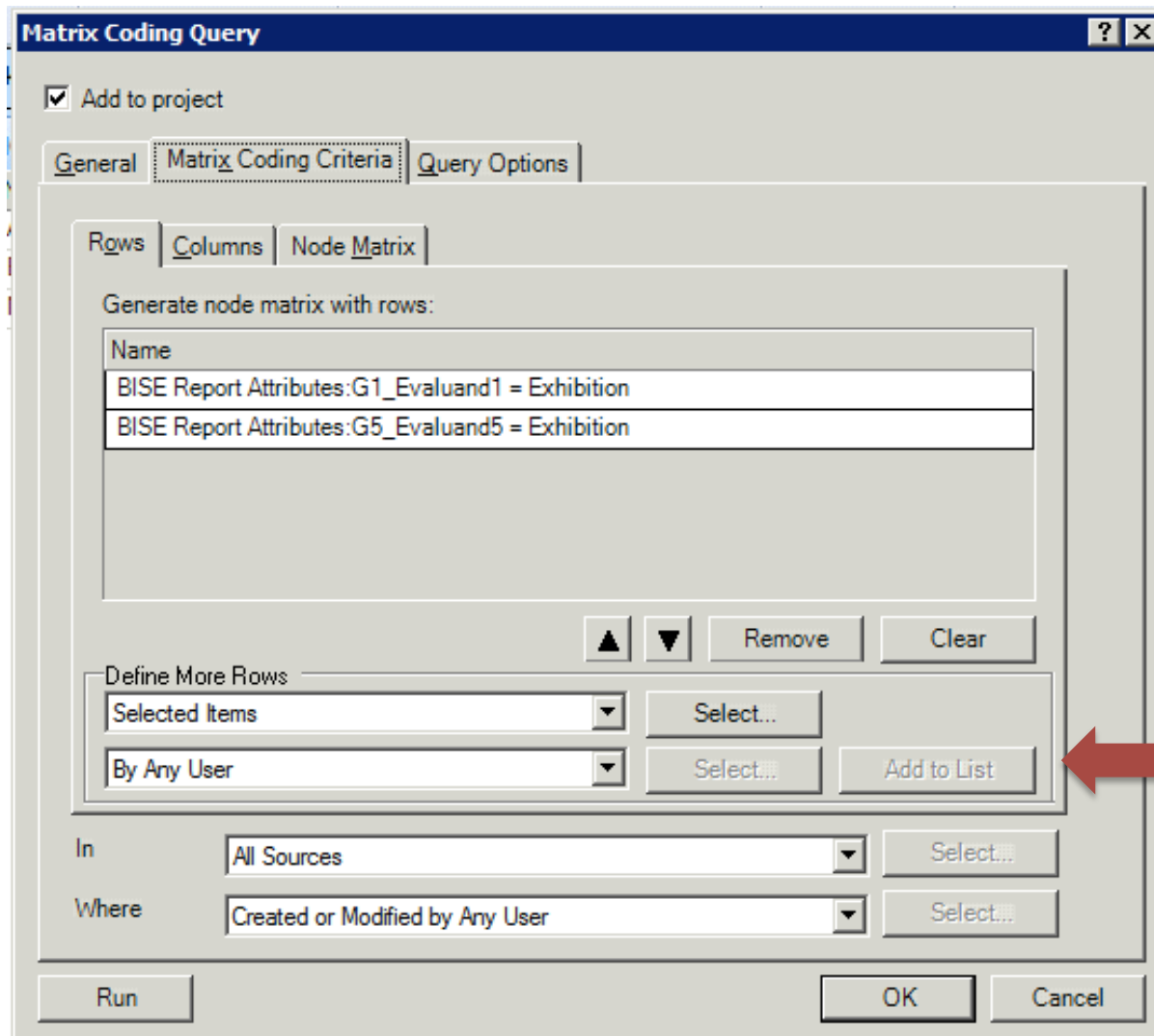


Now you will select the project items for the rows of your query. To answer our question, rows will be “Exhibition,” which is under the report level attribute of Evaluand. So you’ll need to find “Attribute” codes, which are under “Source Classifications.”

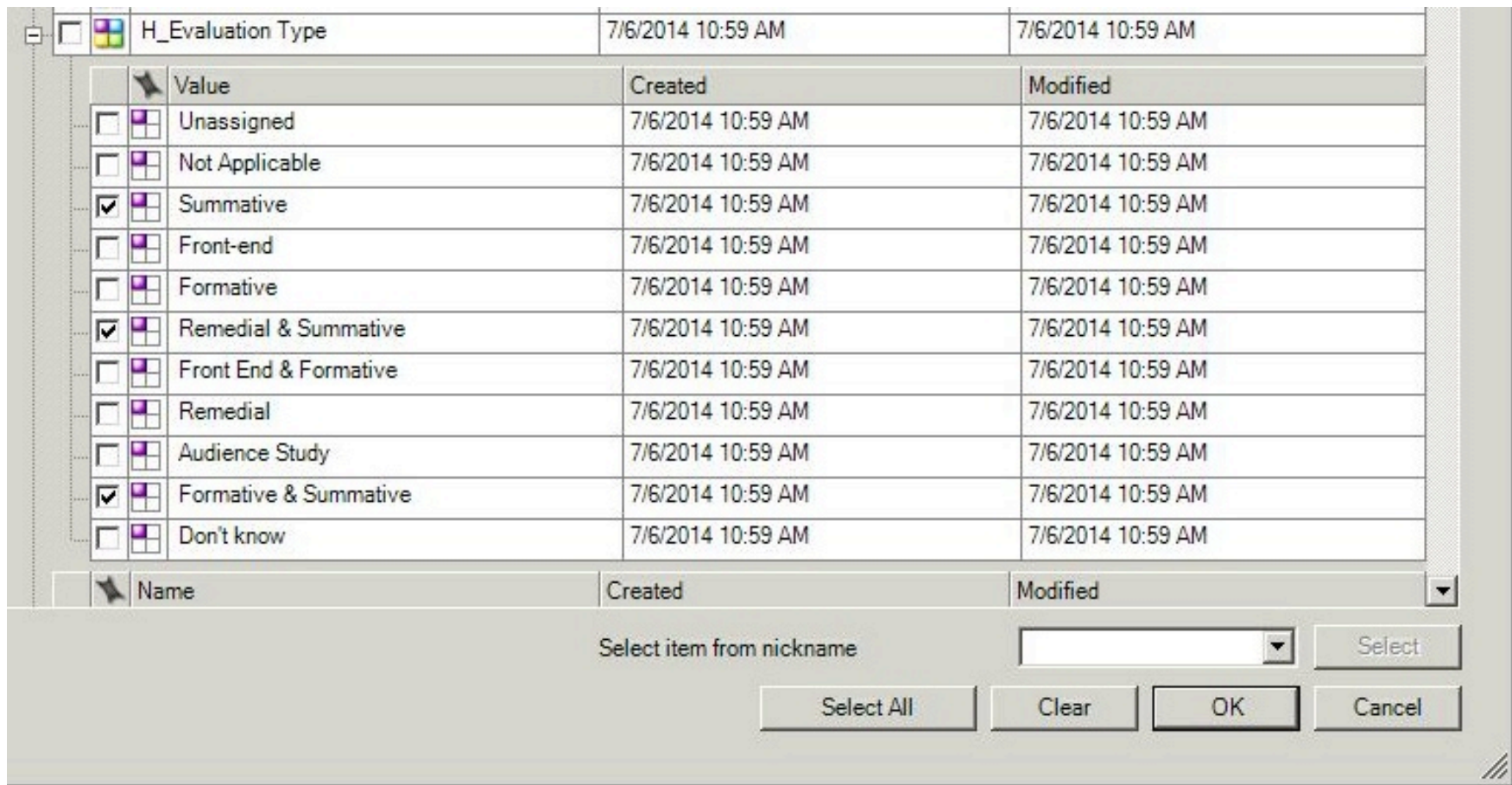
Then expand the Classification Sheet “BISE Report Attributes.”

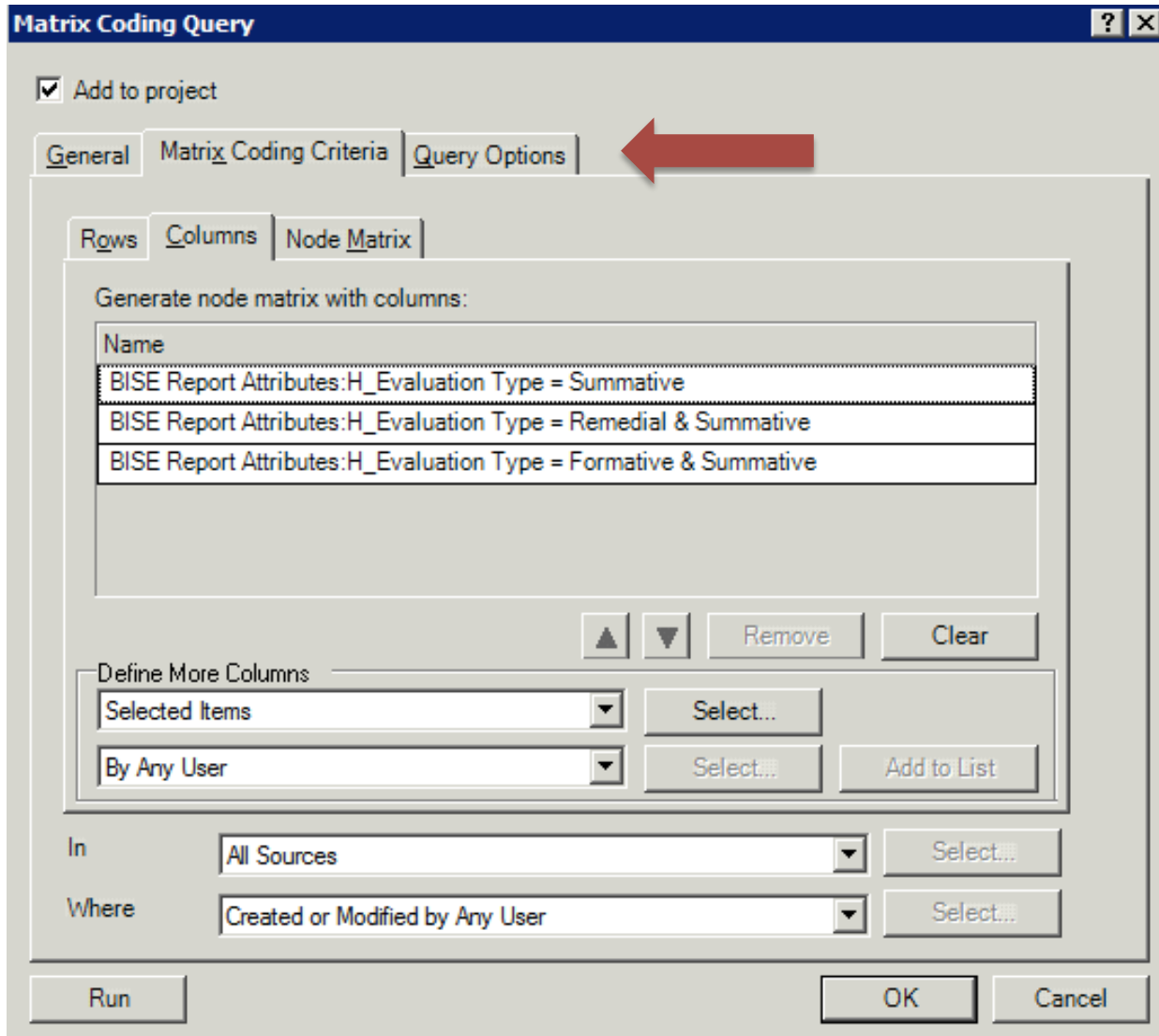
Since we are interested in only those reports on Exhibitions, expand each of the “Evaluand” options and check the “Exhibition” box, where available. For this example, it will be Evaluands 1 and 5 (5 not shown). Click “OK.”

The Row definitions WILL NOT APPEAR UNTIL you click “Add to List.” Here is what it looks like after selected items have been added. Then select the “Columns” tab, and click on “Select” to define the columns.



For the rows, we need to select “Summative Evaluations,” which is under the report level attribute of “Evaluation Type.” So you will need to select the “Source Classifications” box, expand the Attributes, then find and expand “H_Evaluation Type.” Since some reports included Remedial or Formative aspects along with Summative, you will need to check all three boxes that include summative. Then click “OK.”

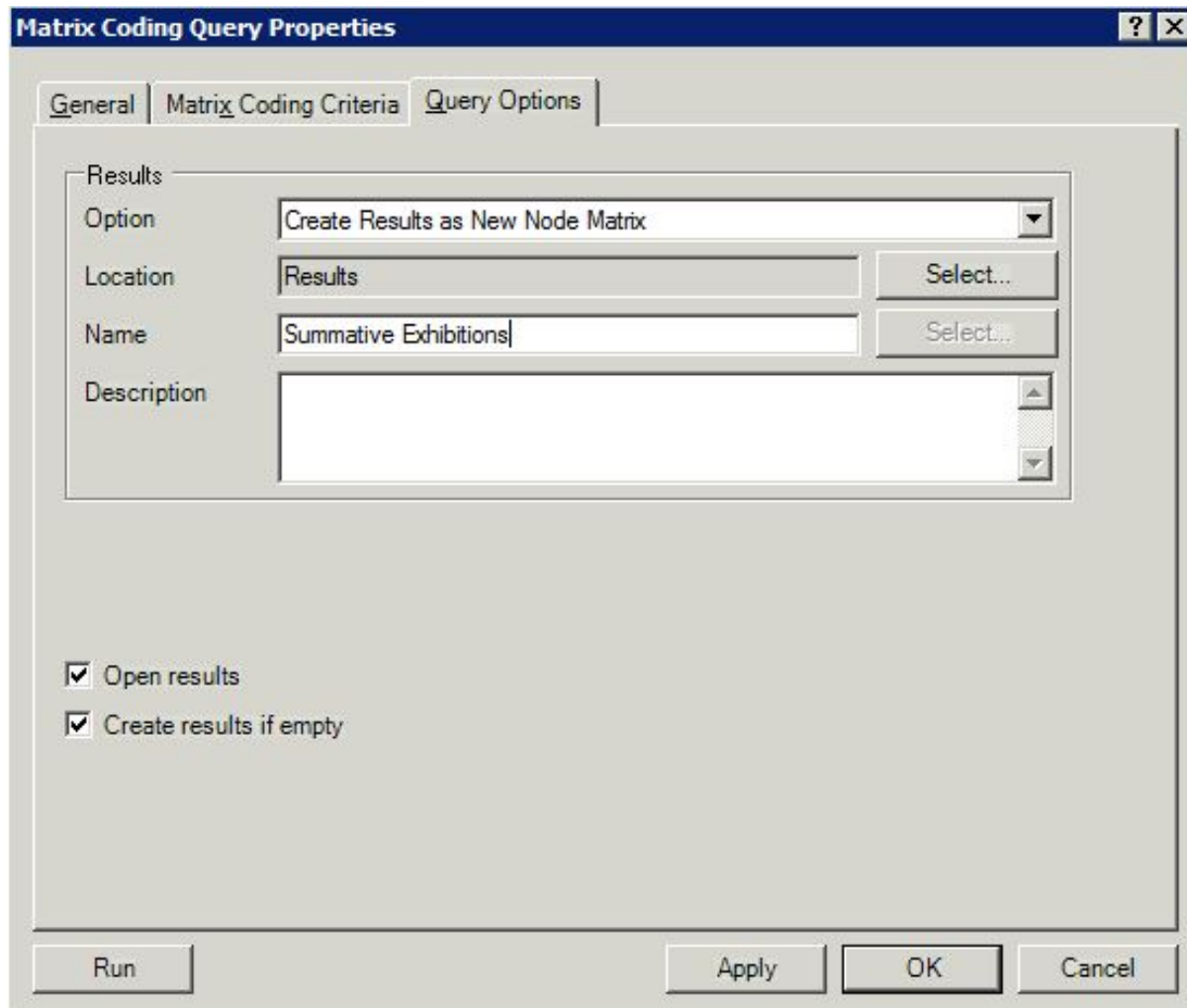




Click “Add to List” to add the column definitions.

Then click “Query Options”.

Query Options allows you to save the results of your query. The default setting for the Option dropdown menu is “Preview Only.” Select “Create Results as New Node Matrix” from the dropdown menu. Select the Location where you want to save your results. Then name your results so that you will understand what they are. Click “Run.”



The screenshot shows the 'Matrix Coding Query Properties' dialog box with the 'Query Options' tab selected. The 'Results' section contains the following fields:

- Option:** A dropdown menu set to 'Create Results as New Node Matrix'.
- Location:** A text box containing 'Results' and a 'Select...' button.
- Name:** A text box containing 'Summative Exhibitions' and a 'Select...' button.
- Description:** An empty text area with scrollbars.

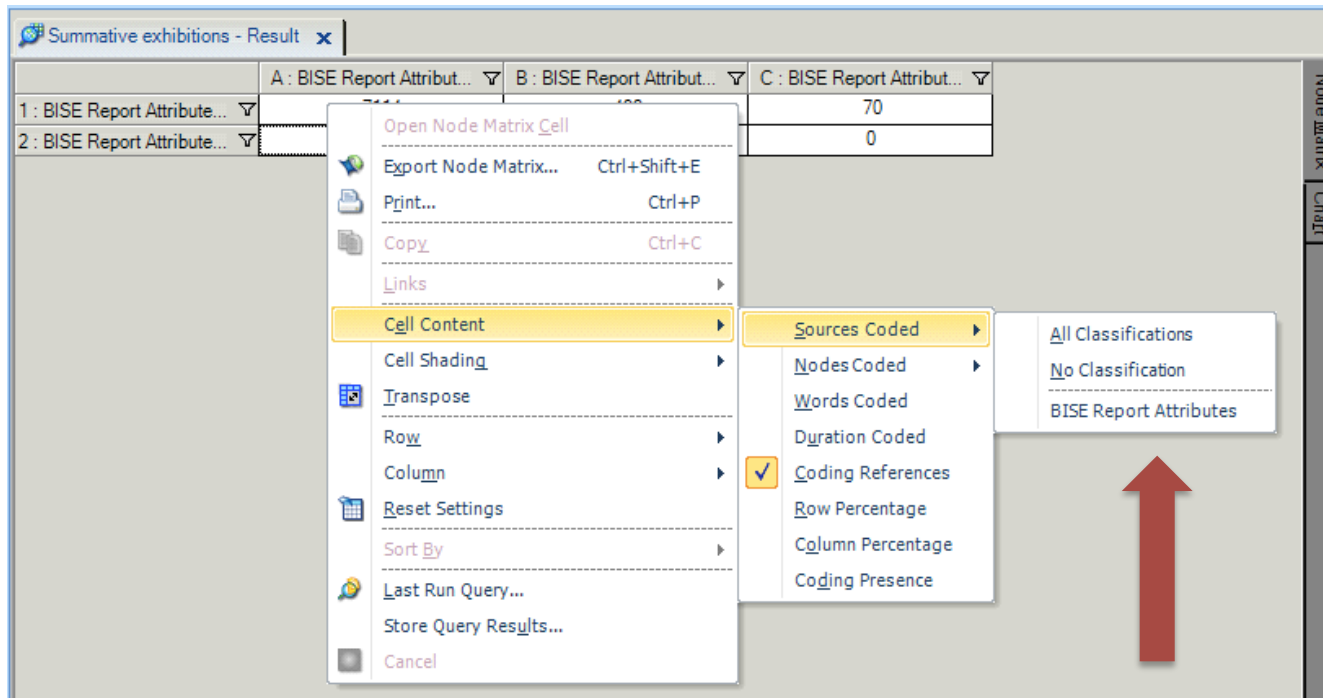
At the bottom of the dialog, there are two checked checkboxes:

- Open results
- Create results if empty

At the very bottom, there are four buttons: 'Run', 'Apply', 'OK', and 'Cancel'.

Note: This step is not required, but by saving the query results, you will be able to access them in the future without needing to re-run the query. Since the BISE database is large, this eliminates future waiting if you need to work with the results again. However, this is a required part of creating a “Set,” which will be discussed later.

The results will look like this, however the numbers displayed in the table represent the number of references coded, not the number of sources.



To change the numbers show they show the number of sources, right click on one of the cells and find the “Cell Content” option from the menu. Select, “Sources Coded” and click on the Attributes file, which will give you the table below.

	A : BISE Report Attribut...	B : BISE Report Attribut...	C : BISE Report Attribut...
1 : BISE Report Attribute...	129	5	2
2 : BISE Report Attribute...	1	0	0

Adding up the six cells results in 136 Summative Reports about Exhibitions.

Or...

If you saved your query results, you can click on the “Results” folder, which will show you the number of sources and references, regardless of if you change the default cell contents.

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar has a 'Queries' section with two sub-items: 'Queries' and 'Results'. A red arrow points to the 'Results' sub-item. The main content area has a search bar at the top with 'Look for:' and 'Search In' dropdowns, and 'Find Now' and 'Clear' buttons. Below the search bar is a 'Results' section with a table. The table has columns: Name, Sources, References, Created On, Created By, and Modified. The first row of data is 'Summative Exhibitions', '136', '7806', '3/8/2015 1:12 PM', 'GMH', and '3/8/2015'. A red arrow points to the '136' value in the 'Sources' column.

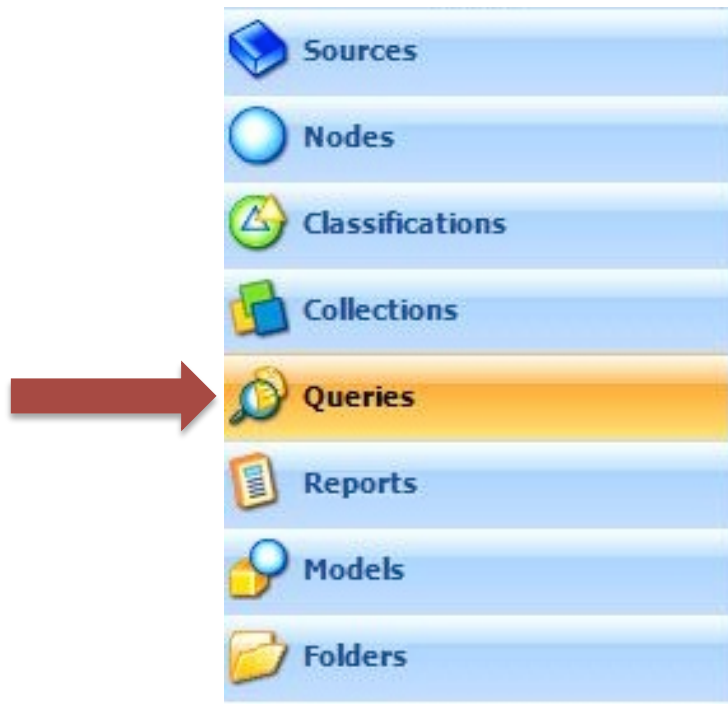
Name	Sources	References	Created On	Created By	Modified
Summative Exhibitions	136	7806	3/8/2015 1:12 PM	GMH	3/8/2015

Question: How many summative evaluations of exhibitions are in the BISE database?

Answer: There are 136 summative evaluations of exhibitions.

Creating a Set From Query Results

Sets are helpful because they limit the number of sources you are considering. This decreases the amount of time it takes NVivo to process queries, and allows you to ask more refined questions.



In the “Queries” workspace, click on the “Results” folder. This is where the “Summative Exhibitions” query results are.



Right clicking on results will pull up the options shown below. Click on “Create As,” then “Create As Set.”

The screenshot shows a software interface with a 'Queries' sidebar on the left and a 'Results' table on the right. The table has columns: Name, Sources, References, Created On, Created By, and M. The row 'Summative Exhibitions' is selected. A context menu is open over this row, listing various actions. The 'Create As' option is highlighted in yellow, and its sub-menu is open, showing options like 'Create As Set', 'Create As Node...', 'Create As Nodes...', 'Create As Relationship...', and 'Create As Static Model...'. A red arrow points to the 'Create As Set' option.

Name	Sources	References	Created On	Created By	M
Summative Exhibitions	136	7806	3/8/2015 1:12 PM	GMH	3/8/201

- Open Node Matrix Ctrl+Shift+O
- Export
- Print
- Cut Ctrl+X
- Copy Ctrl+C
- Delete Del
- Open Linked Query...
- Expand/Collapse
- Create As**
- Add To Set...
- Visualize
- Node Matrix Properties... Ctrl+Shift+P
- Aggregate

- Create As Set**
- Create As Node...
- Create As Nodes...
- Create As Relationship...
- Create As Static Model...

New Set [?] [X]

Name:

Description:

Items:

Type	Content
Node Matrix	1

OK Cancel

Change the name to whatever makes the most sense for your project.

Collections

Look for: Search In: Find Now

Summative Exhibitions

Name	In Folder	Created On	Created By
Summative Exhibitions	Results	3/8/2015 1:12 PM	GMH

Sets
 Summative Exhibitions
 Search Folders
 All Nodes
 All Sources
 All Sources Not Embedded
 Memo Links
 See Also Links
 Annotations

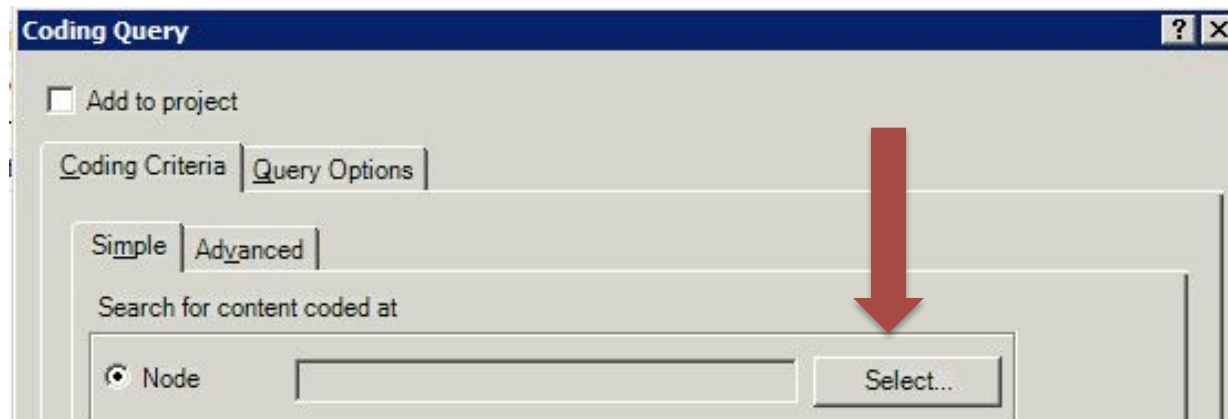
Sets are found in the “Collections” folder hierarchy, but are still considered a source when it comes to running queries.

Attribute x Node Coding Query

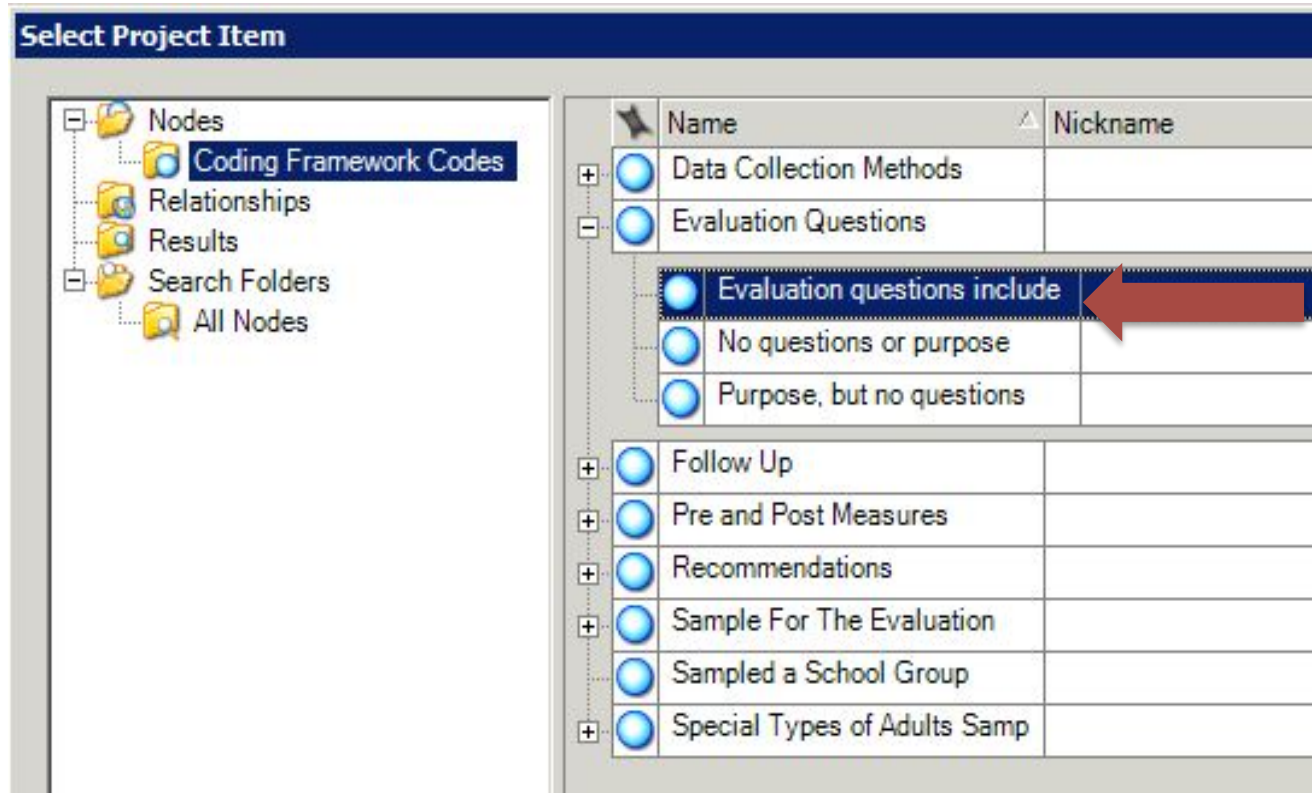
Let's say you also want to answer the question, *“What kinds of evaluation questions do people ask in summative evaluations of exhibitions?”*

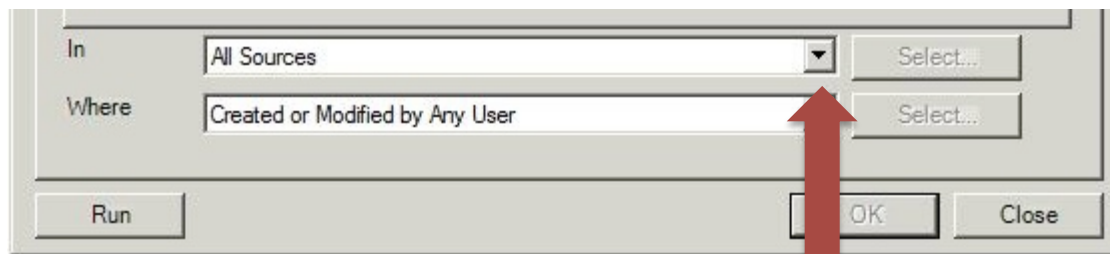
To answer our question, you'll want to create a new query based on report level coding (Attributes) and specific text coded within a report (Nodes). This time select “Coding Query.” Make sure to check “Add to Project.”

Under the Coding Criteria tab, click “Select” to define the “Node” we want NVivo to isolate.



Expand the “Nodes” folder, and click on “Coding Framework Codes.” Then expand “Evaluation Questions,” click “Evaluation questions included,” and then click “OK”

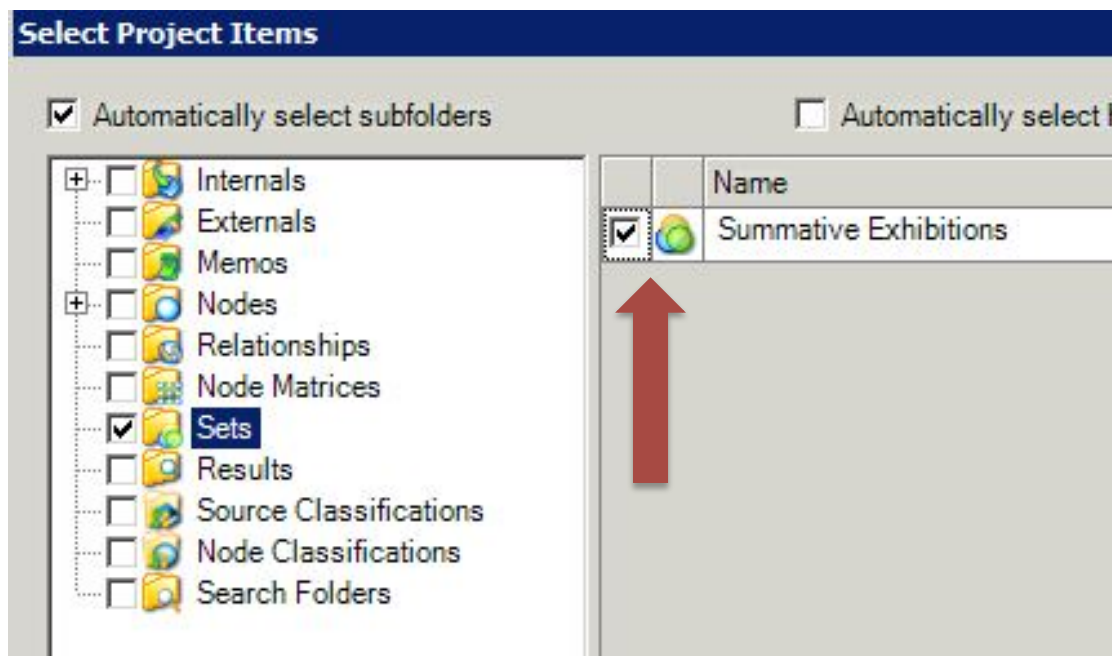




Choose “Selected Items” from the dropdown menu next to “In” to narrow our sources to only those that include “Summative Exhibitions” (the set we created earlier). Click on “Sets” and check “Summative Exhibitions,” then click “OK.”

Select “Run” to generate the query.

See “Attribute x Attribute Query” and “Creating a Set” if you have not already created a set that includes only Summative Evaluations of Exhibitions.



Evaluation Questions (Summative) | Evaluation Questions (Summative

[<Internals\\Combination of Evaluands\\104>](#) - § 5 references coded [0.63% Coverage]

References 1-5 - 1.26% Coverage

What We Wanted to Find Out
 There were many questions we wanted to answer with the summative evaluation. The studies are grouped into four categories: demographics; motivations and satisfaction; behavior and learning; and dissemination of CLO-VC exhibit concepts.

Demographics of visitors: What level of expertise? Were there groupings? Families? Adults?

2003 • Critical Appraisal • Re
 2004 • Exit Interviews
 • Observations at Natural So
 • Questionnaires after the Object Theater Presentation

2005
 • Follow-up Questionnaires about the Object Theater
 • Observations and Questionnaires in Bartels Theater
 • Observations in the Sound Studio
 • Orientation Observations: "The First Five Minutes"

2006 • Critical Appraisal revisited

Motivations and satisfaction: Why did visitors come to CLO-VC? How much time did they spend in the Visitor Center? How did they feel about their visit? What did they enjoy most about their visit? What did

The results will appear and you can view them as a running list (Reference view), or select the "Text" tab to view them one report at a time. Export by right clicking.

Summary
 Reference
 Text
 PDF

Note: Running a Matrix Query --defining the row as the Node and the column as your Set-- will return the same results, but they will be presented as a number matrix (at right). Double clicking on the cell will open the in-text references that are shown above.

Eval Questions | Matrix Coding Query - Results

	A : Summative Exhibitions ▾
1 : Evaluation questions ... ▾	172