

## REMS Analysis Manual - making use of evidence

### 1. Introduction

This analysis manual is designed to assist colleagues to query, interrogate and retrieval sources and evidence from REMS.

To use this manual the user must:

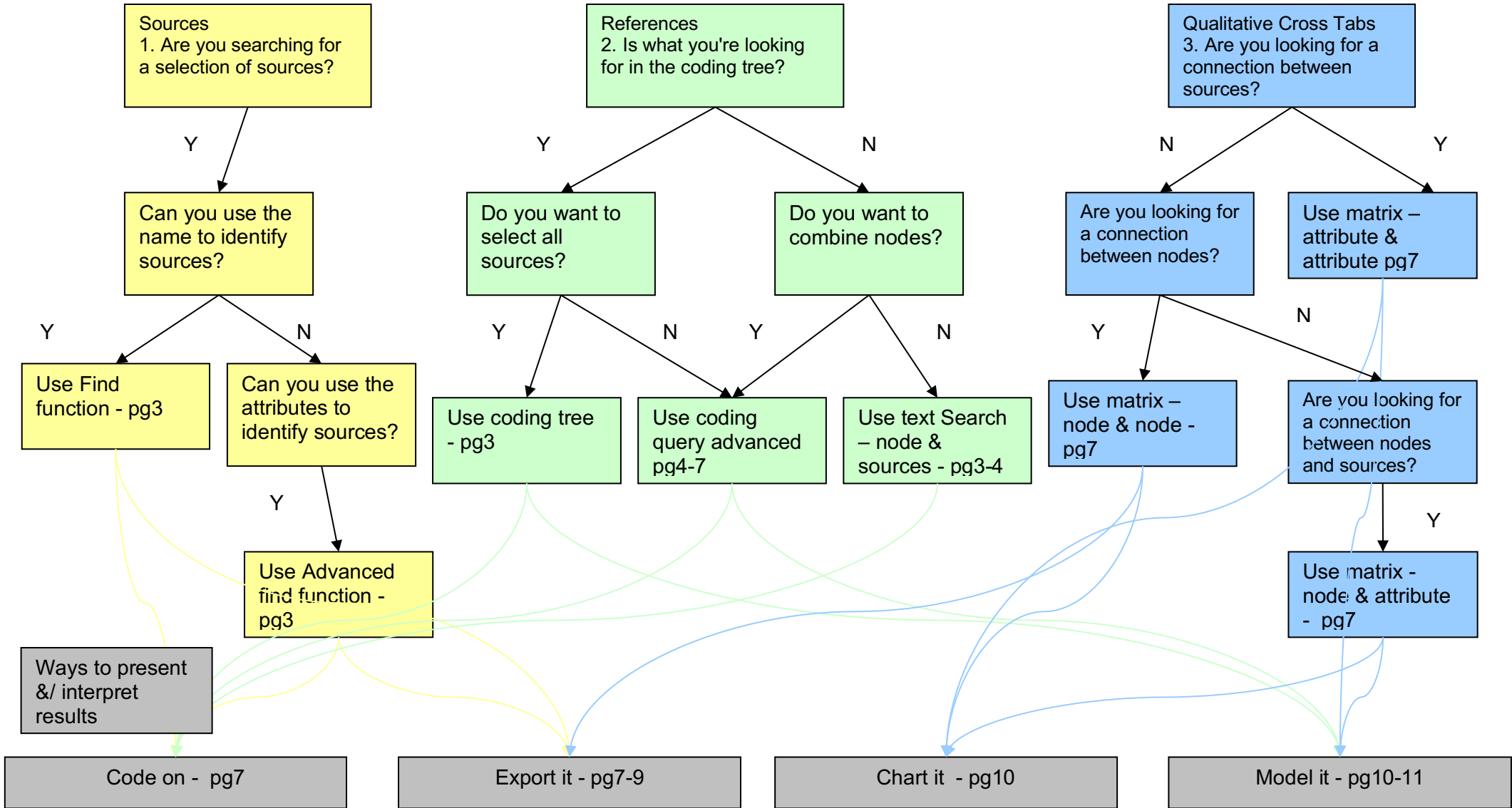
- Know how to use NVivo 8
- Have had the REMS introductory training

When using this manual if you have any problems or would like some help, then please don't hesitate to contact Somia Nasim – [nasims@qca.org.uk](mailto:nasims@qca.org.uk)

### 2. Flow chart

The flow chart on page 2 is devised to help you to determine which analysis option is best for your area of enquiry. Therefore, the advice is to go through the flow chart.

What type of query are you interested in?



## Analysis Process

### 3. Find Function

You can find project items based on their name or characters contained in their name. For example, you could find all the sources, nodes and sets that have *QCA* somewhere in their name.

To find project items by name:

1. Ensure the **Find Bar** is visible at the top of **List View**. To show the **Find Bar**, select **Find** on the **Tools** menu and then click the **Find** option.
2. In the **Find Bar**, enter the item name (or any part of the name) in the **Look for** field.
3. From the **Search In** drop-down list, select the folder you want to search.
4. Click the **Find Now** button.
5. Items matching the criteria are displayed in **List View**.

### 4. Using Advanced Find: Advanced

To gather project items based on a combination of criteria:

1. On the **Tools** menu, click **Find**.
2. Click the **Advanced Find** option.

The **Advanced Find** dialog box is displayed.

3. Click the **Advanced** tab.
4. From the **Look for** drop-down list, select the type of project item you want to find—this selection determines the search options that are available. (For REMS we only ever use 'cases')
5. In the **Define More Criteria** panel, select the required criteria—comprised of **Interaction**, **Option** and **Value**. For example, you could find all *cases* which are functional skills documents and are published in 2008.
6. Click the **Add to List** button. The selected criteria are displayed in the **Find Items that match these criteria** panel.
7. If required, define more criteria and add it to the list.
8. Click the **Find Now** button.
9. The results of the search are displayed in **List View**.

### 5. Using coding tree

Here, refer to the coding tree – To open and review click on the interested node.

### 6. Text Search Queries - nodes and sources

A text search query enables you to search for words or phrases in selected sources, nodes, sets and/or annotations.

To create a text search query:

1. In **Navigation view** click on **Queries**.
2. On the **Main** toolbar, click the **New** button:
3. Click the **Text Search Query in This Folder** option.

The **Text Search Query** dialog box is displayed.

## Research Evidence Management System (REMS)

4. Enter search text and other criteria in the **Text Search Criteria**
5. Determine which areas to search in by using the **Of** option, this enable the selection of:
  - All or certain **sources** to conduct the search in
  - All or some of the nodes to conduct the search in

Here, click the **Selected Items** from the drop down menu and then click select. **Select Project Item** box will appear, here select the items to search in (i.e. nodes/ sources). Note in the **Of** option there's an all sources options, so if this is required for the search, then select this option, rather than selected Items.

6. If you want to save the query, click the **Add to Project** checkbox at the top of the dialog. Enter a name and description in the **General**
7. Determine how the query results are stored in the **Query Options:**
  - In options select – creates results as new node and
  - In spread coding, in spread select custom context and in specify select surrounding paragraphs.
8. To save the query properties without running the query, click **OK**.
9. To run the query, click the **Run** button.

### 6.1. About the Relevance Rating

When you preview the results of a text search, items are displayed with a **Relevance** percentage—a common ranking technique used by internet search engines. The relevance ranking indicates the 'best match' for the scope and criteria you have defined and is derived from:

- The relevance weighting defined for a word (use the Special Characters button to insert a relevance weighting)
- The number of Items included in the search scope
- The number of finds in the search scope
- The number of finds in a particular scope item
- Criteria in your query

## 7. Advanced Coding Queries

You can use advanced coding query to search for source content that has been coded at multiple nodes—and you can use operators to further refine the search.

To build an advanced coding query:

1. Create a coding query
2. Click the Coding **Criteria** tab.
3. Click the Advanced tab.
4. In the **Define more criteria** panel, choose whether you want to search for content coded at (or NOT coded by)
  - All Selected Nodes (this node AND this node)
  - Any Selected Node (this node OR this node)
  - **Any Case Where** an attribute is equal to a selected value

Here, click the **Selected Items** from the drop down menu and then click select. **Select Project Item** box will appear, here select the items to search in (i.e. nodes/ sources). Note in the **Of** option there's an all sources options, so if this is required for the search, then select this option, rather than selected Items.

## Research Evidence Management System (REMS)

5. Click the **Select** button and choose the required nodes or attribute value.
6. Click the **Add to List** button.

The criteria is added to the **Search for content matching these criteria** list.

8. To build on this criteria:
  - Click the **AND** drop-down list and select the required operator
  - If you choose the NEAR or PRECEDING Content operators, the Coding **Search Operator** dialog box is displayed and you can specify the proximity and retrieval options
  - Select Coded **by** (you can also choose **Not Coded by**) from the drop down list.
  - Select the required nodes or attribute value.
  - Click the **Add to List** button
  - If required, use the arrow buttons to force the order of processing. Select an item from the criteria list and click the required arrow button.
9. To add or edit items in the **Search for content matching these criteria** list:
  - Select the item you want to edit.
  - Click the **Remove** button. The item is removed from the list and is available for edit in the **Define more criteria** panel
  - Edit the required criteria, for example, change **AND** to **OR**.
  - Click the **Add to List** button to return the edited item to the criteria list.
10. From the **In** drop-down list, select the items you want to include in the query. For example, search all sources or selected nodes.
11. From the **Where** drop-down list, you can specify to search project items created and/or modified by any or selected users.
12. Determine how the query results are stored in the **Query Options tab**

Option	Description												
Option	<p>From the drop-down list, select how you would like to save the results of the query:</p> <table border="1"> <tbody> <tr> <td>Preview Only</td> <td>Displays matching content in a preview node.</td> </tr> <tr> <td>Create Results as New Node</td> <td>Creates a new node, codes all matching contents at the node, and saves it in the selected node folder.</td> </tr> <tr> <td>Merge Results into Existing Node</td> <td>Codes all matching content at an existing node. Click the <b>Select</b> button and choose the required node.</td> </tr> <tr> <td>Create Results as New Set</td> <td>Creates a new set that includes all project items matching the search criteria.</td> </tr> <tr> <td>Add Results to Existing Set</td> <td>Saves the matching items in an existing set. Click the <b>Select</b> button and choose the destination set.</td> </tr> <tr> <td>Create Results as New Node Hierarchy</td> <td>Saves the results as a tree using the node name as the parent and matching items as the children.</td> </tr> </tbody> </table>	Preview Only	Displays matching content in a preview node.	Create Results as New Node	Creates a new node, codes all matching contents at the node, and saves it in the selected node folder.	Merge Results into Existing Node	Codes all matching content at an existing node. Click the <b>Select</b> button and choose the required node.	Create Results as New Set	Creates a new set that includes all project items matching the search criteria.	Add Results to Existing Set	Saves the matching items in an existing set. Click the <b>Select</b> button and choose the destination set.	Create Results as New Node Hierarchy	Saves the results as a tree using the node name as the parent and matching items as the children.
Preview Only	Displays matching content in a preview node.												
Create Results as New Node	Creates a new node, codes all matching contents at the node, and saves it in the selected node folder.												
Merge Results into Existing Node	Codes all matching content at an existing node. Click the <b>Select</b> button and choose the required node.												
Create Results as New Set	Creates a new set that includes all project items matching the search criteria.												
Add Results to Existing Set	Saves the matching items in an existing set. Click the <b>Select</b> button and choose the destination set.												
Create Results as New Node Hierarchy	Saves the results as a tree using the node name as the parent and matching items as the children.												
Location	If you are saving the results as a new node, click the <b>Select</b> button to define the location. For example, to save the results as a new free node, select the <b>Free Nodes</b> folder.												
Name	<p>If you are saving the results as a new node or set, enter a name for the new item.</p> <p>If you are merging the results into an existing node or set, click the <b>Select</b> button and choose the destination item.</p>												
Description	If required, enter a description for the new node or set.												
Spread to	Refer to <a href="#">Spread Coding to the Context</a> for more information.												
Open results	Click this checkbox to display the query results in <b>Detail View</b> .												
Create results if empty	<p>If the query does not return any results, click this option if you want to create an 'empty' node.</p> <p>This option is only available if you have chosen to save the results as a new node, set or node hierarchy.</p>												

7. Determine how the query results are stored in the **Query Options** :
  - In options select – creates results as new node and
  - In spread coding, in spread select custom context and in specify select surrounding paragraphs.
8. If you have selected the **Add to Project** checkbox, click **OK** to save the query set-up.
9. Click the **Run** button.
  
13. If you have selected the **Add to Project** checkbox, click **OK** to save the query set-up.
14. Click the **Run** button.

## 8. Matrix Coding Queries

Matrix coding queries enable you to compare pairs of items and display the results in a table or matrix. A new node is created for each cell in the matrix—you can open the node and explore all the material gathered there.

To define the criteria for a matrix coding query:

1. In **Navigation View**, click the **Queries** button.
2. Right click the mouse in the white space in list view.
3. Click the **Matrix Coding Query in This Folder** option.

The **Matrix Coding Query** dialog box is displayed.

4. From the **Define More Rows** drop-down list, click the type of item you want to display in rows.
5. Click the **Select** button and choose the required items.
6. Click the **Add to List** button.
7. Click the **Columns** tab.
8. From the **Define More Columns** drop-down list, click the type of item you want to display in columns.
9. Click the **Select** button and choose the required items.
10. Click the **Add to List** button.
11. From the **In** drop-down list select the items you want to include in the scope of the search.
12. If you have selected the **Add to Project** checkbox, click **OK** to save the query set-up.
13. Click the **Run** button.

## Interpreting the Results

### 9. Code-on process

Once a query is completed the output is quite often a list of references – i.e. raw data, to make sense of it will require you to read through the references and draw out common or relevant themes. You can do this in NVivo by coding on the references to existing nodes (tree nodes) or new nodes (free nodes which can be moved into the tree node).

To code-on from out put is the same as coding a document, i.e. highlight the section to be coded and drag and drop it into the node. Note: with free nodes you will need to create the nodes before you code.

### 10. Export it

You can export project items to work with them in other applications such as Microsoft Word or Excel. You can also export your sources and nodes to HTML, so you can open them in your web browser. This can be useful if you want to share project items with someone who does not have **NVivo**. You can export the following:

## Research Evidence Management System (REMS)

- nodes (free nodes, tree nodes, cases and relationships)
- matrices
- the casebook
- Reports
- Query results

### 10.1. Nodes

You can export free nodes, tree nodes, cases and relationships to HTML and view them as a "website" in your Internet browser.

To export a free node, tree node, case or relationship:

1. In the **List View**, select the required node.
2. On the **Project** menu, click **Export <Node>**.

The **Export Options** dialog box is displayed.

3. Select the required options
4. Click **OK**.

The **Save As** dialog box is displayed.

5. In the **Save in** list, select the destination for the exported file.
6. In the **File name** field, enter a name for the exported file.
7. In the **Save as type** field, select the format for the exported file.
8. Click **Save**.

### 10.2. Matrices

You can export the results of a matrix coding query as a Microsoft Excel file (.xls) or a tab-separated text file (.txt). To export a matrix:

1. Open an existing **Matrix**.

OR

Create and run a matrix coding query—refer to **Matrix Coding Queries** for more information.

The matrix is displayed in **Detail View**.

2. On the **Project** menu, click **Export Matrix**.

The **Save As** dialog box is displayed.

3. In the **Save in** list, select the destination for the exported file.
4. In the **File name** field, enter a name for the exported file.
5. In the **Save as type** field, select the format type for the exported file.
6. Click **Save**.

### 10.3. The Case Book

You can export the casebook as a tab-separated text file and open it in Excel. To export the casebook:



## Research Evidence Management System (REMS)

1. On the **Tools** menu, click **Casebook**.
2. Click the **Export Casebook** option.

The **Export Casebook** dialog box is displayed.

3. Click the **Browse** button to define the location for the exported file.
4. Select the required options
5. Click **OK**.

### 10.4. Reports

You can export a report to work with it in other applications. The available formats for export include:

- Microsoft Word (.doc)
- Rich Text Format (.rtf)
- Microsoft Excel (xls)
- Portable Document Format (.pdf)
- HTML (.htm)

To export a report:

1. On the **Tools** menu, click **Reports**.
2. Select the required report.
3. Define the report format options. Different options are displayed depending on the type of report. Refer to specific report Help topics for details.
4. Click **OK** to run the report.

The report is displayed in the **Report Viewer**.

5. Click the **Export Report** button on the toolbar:

The **Export Report** dialog box is displayed.

6. Select the required format and location.
7. Click the **Save** button.

### 10.5. Query Results

You can export query results to HTML, PDF, Microsoft Word, Microsoft Excel, as a plain or tab-separated text file. The format available will depend on the type of query you ran and how you chose to store your query results. When you store **text query** and **coding query** results as nodes, you can export them to HTML:

1. In **Navigation View**, click Queries.
2. Click on the Results folder.
3. In List View, select the query result to export.
4. On the Project menu, click Export Result.
5. Select the required options
7. Click OK.

The **Save As** dialog box is displayed.

5. In the Save in list, select the destination for the exported file.
6. In the File name field, enter a name for the exported file.
7. In the Save as type field, select the format for the exported file.
8. Click Save.

## 11. Chart it

You can create chart for sources, nodes, attributes and query results (including matrices). There are instructions on the best ways to chart different output, refer to NVivo help.

To create a chart:

1. In the **Tools** menu, click .

The **Wizard** dialog box is displayed.

2. Select the chart you want to create and click **Next**.
3. Select the data you want to chart in the options provided. These options will change depending on the type of chart you want to generate. Refer to **Selecting Options** for details.
4. Click **Finish** to generate the chart.

The chart is displayed in **Detail View**.

## 12. Model it

You can create models to visualise, explore and present the connections in your data. For example, you might use a model to plan your project and sketch your expectations/ themes or hypotheses.

Models are made up of **shapes and connectors** that may or may not be linked to existing project items.

When a shape or connector is linked to an existing project item, you can easily open the item and explore it in **Detail View**.

### 10.1 Dynamic and Static Models

By default, the models you create in **NVivo** are 'dynamic'. This means you can make shapes 'live' to the data by linking them to existing project items—and you can open the project item directly from the shape.

After creating a model, you may want to keep a 'snapshot' of it at a particular point in your project. This snapshot is called a 'static' model. You cannot edit static models and they are no longer linked to the live data in your project—so if you change a name of a node, for example, it will not be updated in the static models.

### 10.2 What Can You Do in a Model?

When working with a model you can:

- Copy/paste, drag and drop or use the model menu to add project item shapes to the model — including sets or query results.
- Add a project item along with its associated items.
- See how project items in a model are linked.
- Group items and show or hide the groups as required. This allows you to show stages or different views on the same model.
- Zoom out to see more of a model at a reduced size.

### 12.3. Arranging Shapes and Connectors

You can drag shapes and connectors to move them to the required position in a model. **NVivo** also provides a number of automatic **layout options** that can be a useful starting point for laying out your model —experiment with the options to find one that suits you. You can find these options by clicking the model menu and selecting **Layout**.