

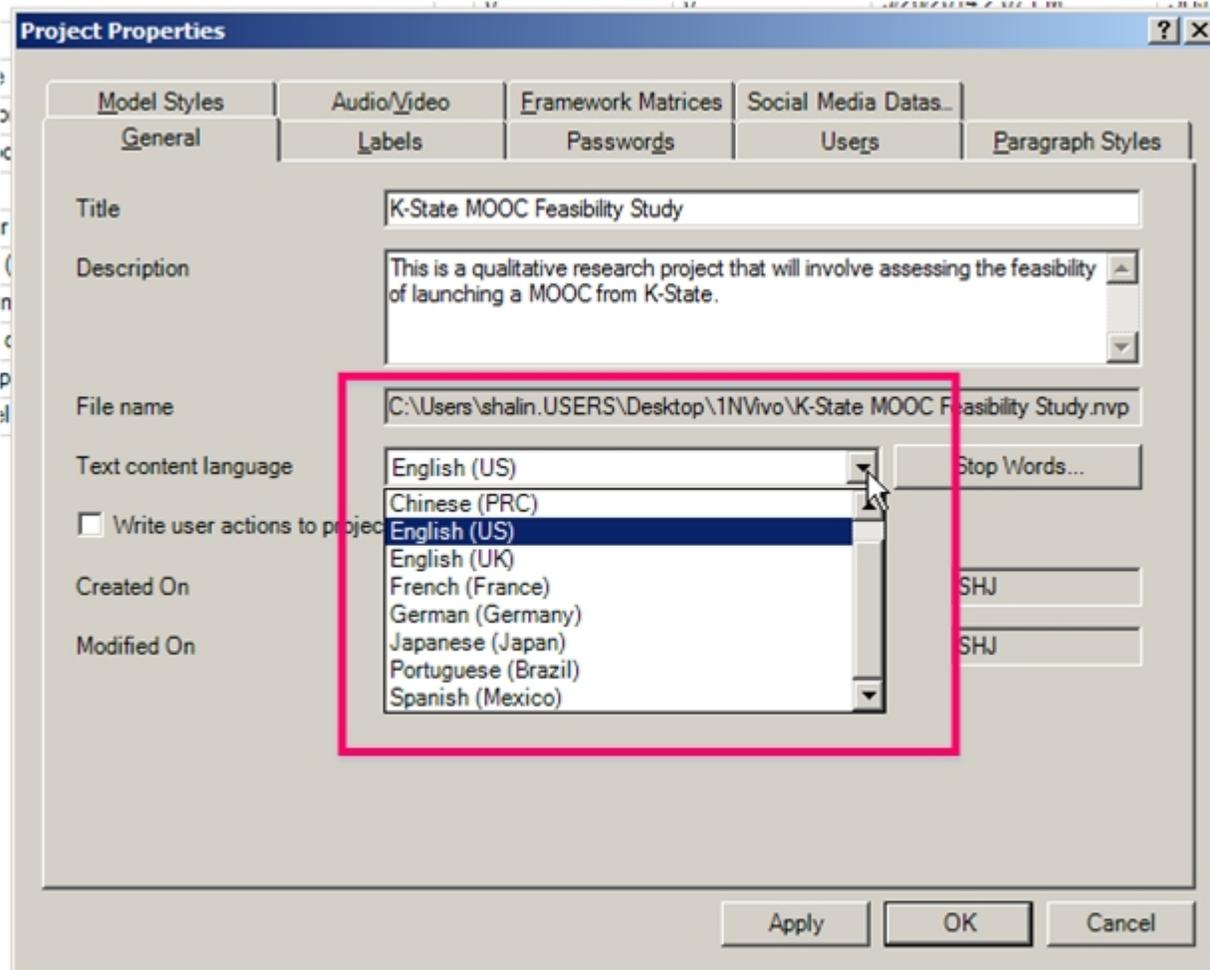
# MATRIX QUERIES AND MATRIX DATA REPRESENTATIONS IN NVIVO 12 PLUS

NVivo Advanced  
(Updated)

# OVERVIEW

1. Matrices and their basic structures
2. Types of elements (variables) for matrix comparisons
3. Setting up matrix queries in NVivo 12 Plus
4. Specific matrix “use cases” in qualitative, quantitative, and mixed methods research
5. Wrap-up

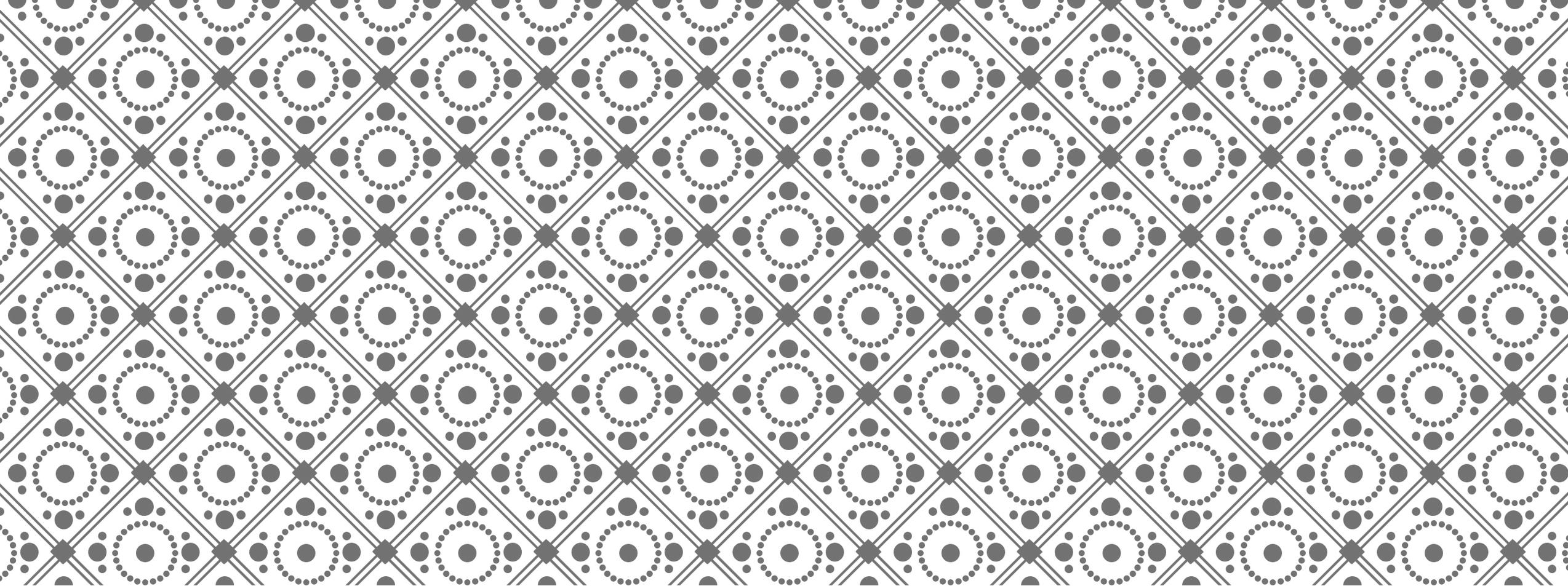
# IF MULTILINGUAL...SELECTION OF A BASE LANGUAGE (“TEXT CONTENT LANGUAGE”)



Go with default (determined by QSR International based on purchaser location in the world)

OR

NVivo ribbon -> File tab -> Info -> Project Properties -> General (sub) tab -> Text content language (dropdown menu)



# 1. MATRICES AND THEIR BASIC STRUCTURES

# DEFINITION(S) AND PURPOSES

## General Purposes

Matrices are used to explore and show data relationships and patterns

- In NVivo, any defined element may be used to populate the respective matrices
- NVivo uses (intensity) matrices to report out on sentiment analysis autocoding findings
- NVivo 12 Plus uses (intensity) matrices to report out on theme and subtheme autocoding findings

## Structure

“a rectangular array of quantities or expressions in rows and columns that is treated as a single entity and manipulated according to particular rules” (in a mathematics sense; in a computer science / information technology sense) (per Google search engine)

a complex of lines intersecting at right angles (via rows and columns)

# MATRICES ARE ABOUT RELATIONSHIPS

Types of Common Relationships found in Matrices:

- hierarchical such as general to specific, topic to subtopic,
- within the set of, part of a type, contained within, found within
- included with, co-occurring with,
- associated with (some relationship but not fully defined)
- appearing in close proximity with,
- similar to, related by likeness
- different from (orthogonally unrelated)

# MATRICES ARE ABOUT RELATIONSHIPS (CONT.)

For example, some relationships described by matrices include:

- Which source documents (articles) are related to particular themes?
- Which themes and subthemes are related to which documents?
- Which terms from text sets are related to the four sentiment categories (very negative, moderately negative, moderately positive, and very positive)?
- What are similarities and dissimilarities between the coding of two coders (in a dyadic comparison in a coding comparison)?
- What are macro themes in a coding structure or codebook (through a matrix coding query)?

# TYPES OF MATRICES

Matrices are referred to by their application (matrix type), which includes the types of data and the analytical uses of that data

- Confusion matrix / contingency table or cross-tabulation analysis / error matrix (predicted values vs. actual empirical values)
  - These are sometimes used to highlight the differences between Type I and Type II errors in basic signals detection
- Effects matrix
- Sentiment analysis intensity matrix (a temperature matrix, ~ to a color-saturation heatmap but in matrix format or with intensity indicated by number)
- Relational or network matrices (for relationships), and others

Matrices are generically referred to sometimes by the numbers of their elements in their rows and columns (as in a 5 x 7 matrix, or a 2 x 2 matrix)

# TYPES OF MATRICES (CONT.)

Specific topical matrices are referred to by their main contents (one content type along its column headers and the other along its rows)

- For example: type-by-document matrices, document-by-theme matrices, and others

# GENERAL FEATURES

Matrices do not have to be symmetrical in terms of the labels on Column A1 and Row 1A (in the next diagram)

The numbers of entities (column and row headers) in the rows and columns do not have to match; they do not have to pair either (but may depending on the type of matrix)

- Data may be incomplete, and matrices still have informational value (they are robust even in the condition of missing data)

Tables tend to be more structured, with unique records on each row (running horizontally) and variables at the top of each column (running vertically)

Matrices may be automatically extracted (by computer); they may be manually created

# BASIC STRUCTURE

	Matrix Variables (Columns)			
	A			
1				
Matrix Variables (Rows)			Data Cells	

# MATRIX INDICATORS (W/ DEFINED ROW AND COLUMN LABELS/HEADERS)

Variables may be...

- Of a similar kind or type (in the matrix): all nodes / case nodes (individuals to individuals, or organizations to organizations) / codes; all interviews (in various groupings); all (cross-referenced) responses to questions, etc.
- Of mixed kinds or types (across rows and columns, not within the cells): themes and research documents; physical locations and interview subjects; themes (terms) and interviews; themes (concepts) and categorical outcomes; individuals and organizations; time periods and themes; sources in NVivo (sources, memos, codes, transcripts, interviews, and others)

In the data cells...

- Presence or non-presence of a relationship (1 or 0; a binary finding)
- Frequency of occurrence of relationship; “strength” of relationship (may be turned into a network graph); intensity
- Contents of matrix variable overlap in text (content) format; coded text

# MATRIX CELLS

Cells come at the intersection of respective column headers and rows (individual records)

Matrices may be labeled “sparse” if there are more cells with 0s than with non-zeroes (whether in binary matrices or strength-of-relationship matrices)

# ...IN QUALITATIVE AND MIXED METHODS RESEARCH, MATRICES...

Are word- or text-based; may include a quantitative aspect (usually frequency counts as an indicator of relationship strength)

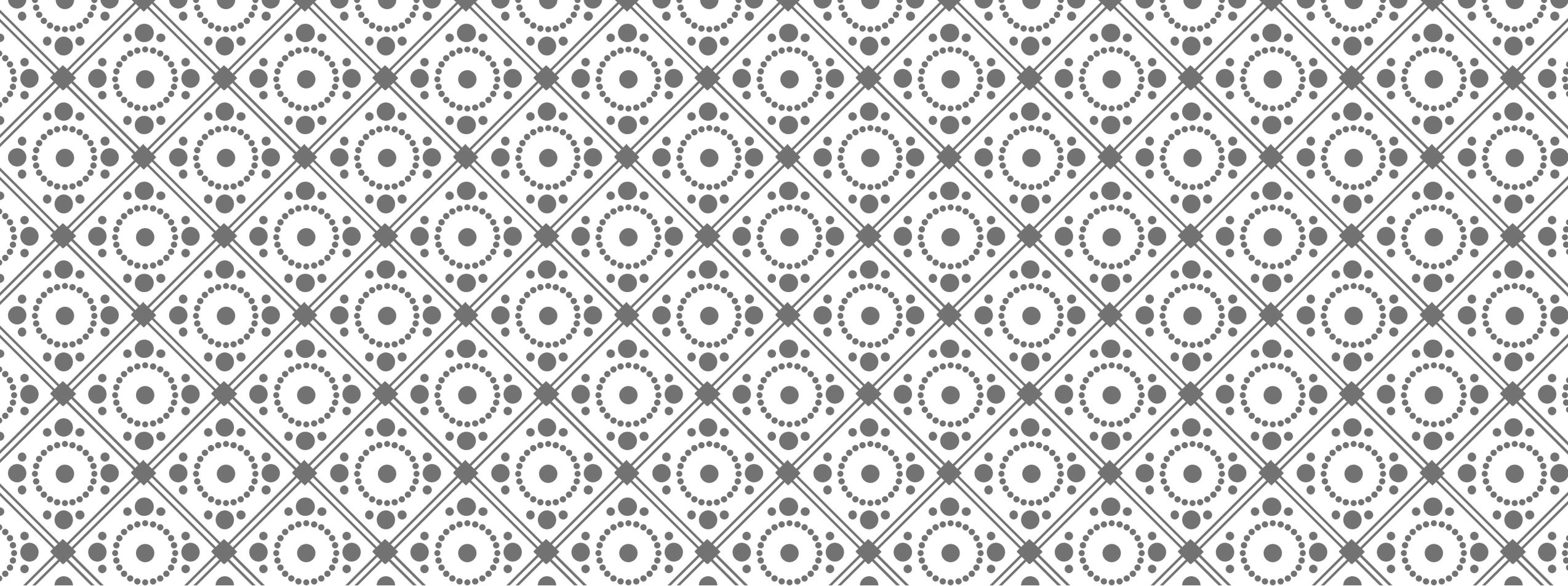
- Text may be “raw” (primary source data; transcripts) or highly processed (edited research articles)

Are based on variables (nodes, themes, interviewee / survey taker / focus group participant demographics and “characteristics” for grouping, and others)

May be used at various scales: the micro- (cell-level), meso- (relational, dyadic, triadic / motif...), and macro- (matrix-scale pattern)

May be designed (1) based on a targeted question, (2) based on the need to surface leads for further exploration (such as a “text summarization” application), (3) based on pure exploratory discovery

May contain single or multiple queries



## 2. TYPES OF ELEMENTS (VARIABLES) FOR MATRIX COMPARISONS

# VARIABLES FOR MATRIX COMPARISONS IN NVIVO 12 PLUS

Any text (at the most atomistic level)

Any groups of text or multimedia represented by text descriptors (folders of contents)

Any codes (nodes, case nodes)

Any groups of nodes

Any “coded by” set (of codes / nodes)

- Coder-based comparisons

Any attributes or variables

- Such as indicated by classification sheets

Any categorical variables

Any relationships

Any models

Any model items

# THE RESEARCH PROCESS

## General Overview

Literature review

Research design

Research instrument prototyping and design (or acquisition) and pilot testing

Sampling

Research

Data collection

Data cleaning

Data analysis

Write-up and presentation



## Possible Matrix Applications

Text summarization (themes and documents)

Relevant document identification (for close reading) in a literature review

Pattern identification in interviews, surveys, notes, and codes

Data visualization as relational network graphs (for analysis, for presentation)

... and others

# SOME TYPES OF “ASKABLE” QUESTIONS WITH MATRICES

Are there instances of particular text in particular “searchable” documents (.PDF, .txt, .rtf, .doc, .docx, etc.)?

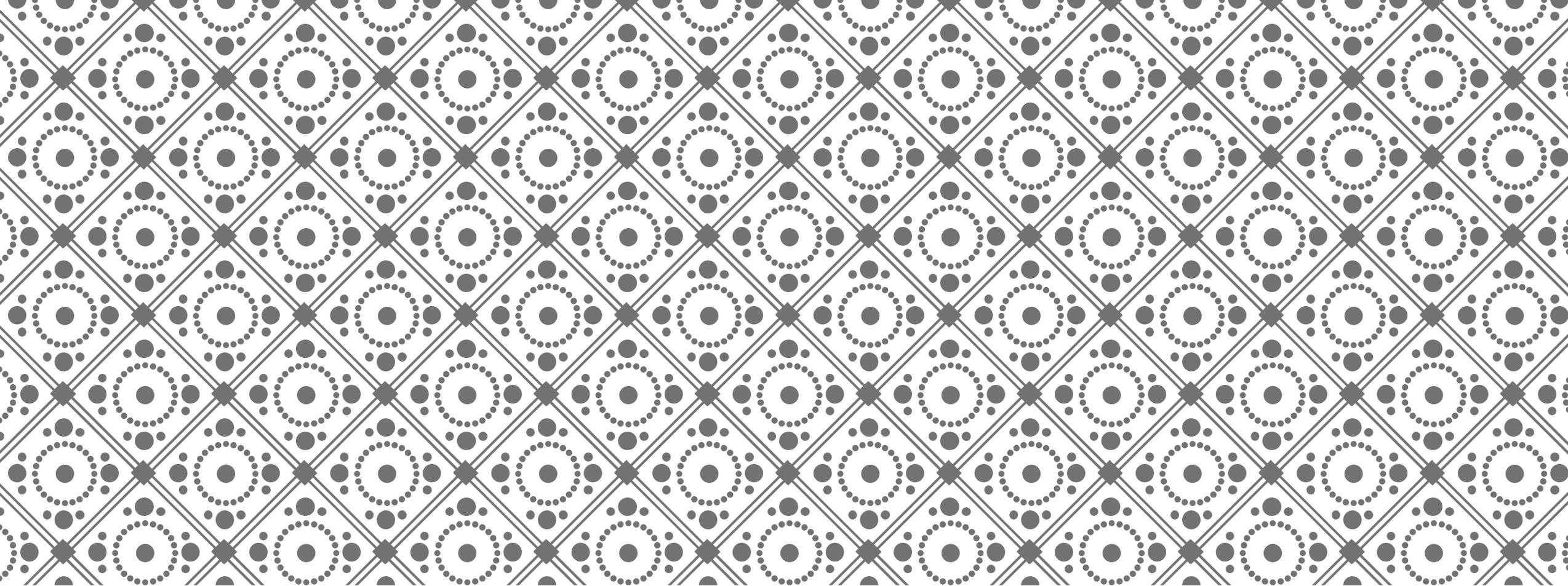
Are there locational or spatial patterns in (textual) data?

Are there temporal patterns in (textual) data?

Are there topical or theme patterns in (textual) data?

Are there similarities / differences between responses of individuals from different demographic or categorical or spatial or other groupings? (from interview, survey, focus group, or other similar types of data)

Are there relationships between concepts? Individual entities? Group entities?



# **3. SETTING UP MATRIX QUERIES IN NVIVO**

# DATA INGESTION IN PROPER FORMS

## **Sizes of Contents**

All text ingested atomistically (the lowest indivisible “unit of analysis” or “record” or multi-media-based “object” such as an article or a memo)

- If a series of articles are all created as one text set, generally, the text set will be queried as one document (instead of a series of articles in a text corpus)

## **Accessible Machine-Readable Text**

All scanned text as “searchable” or optical character recognition (OCR) text

All video transcribed into machine-readable text

All audio transcribed into machine-readable text

All imagery alt-texted into machine-readable text

# DATA PREPARATION

## General in NVivo

All relevant research materials included and coded; clear data labeling, consistent naming protocols

Various types of groupings (by folder, by node, by nickname, by classification variable, and others), without creating data redundancy (which skews text queries and text frequency counts and other types of analyses); may delete redundant text for data queries...or create new (sub) NVivo projects with select data for particular data queries

Goal: all data fully exploited in clear ways

## Specific in NVivo

Combined master file of group coded projects, with multiple user coded contents (for runs of interrater reliability)

Relationships defined and linked

Case node source classifications applied

Models created

# PATHS USED TO CONDUCT DATA QUERIES RESULTING IN DATA MATRICES

NVivo ribbon -> Query tab -> Matrix Coding

NVivo ribbon -> Query tab -> Coding Comparison

NVivo ribbon -> Query tab -> Group Query (models, relationships, attributes, coding at)

(...to live and interactive demos)

# QUERIES FOLDER STORAGE

The screenshot shows the NVivo software interface for a project titled "K-State MOOC Feasibility Study.nvp". The interface is divided into several sections:

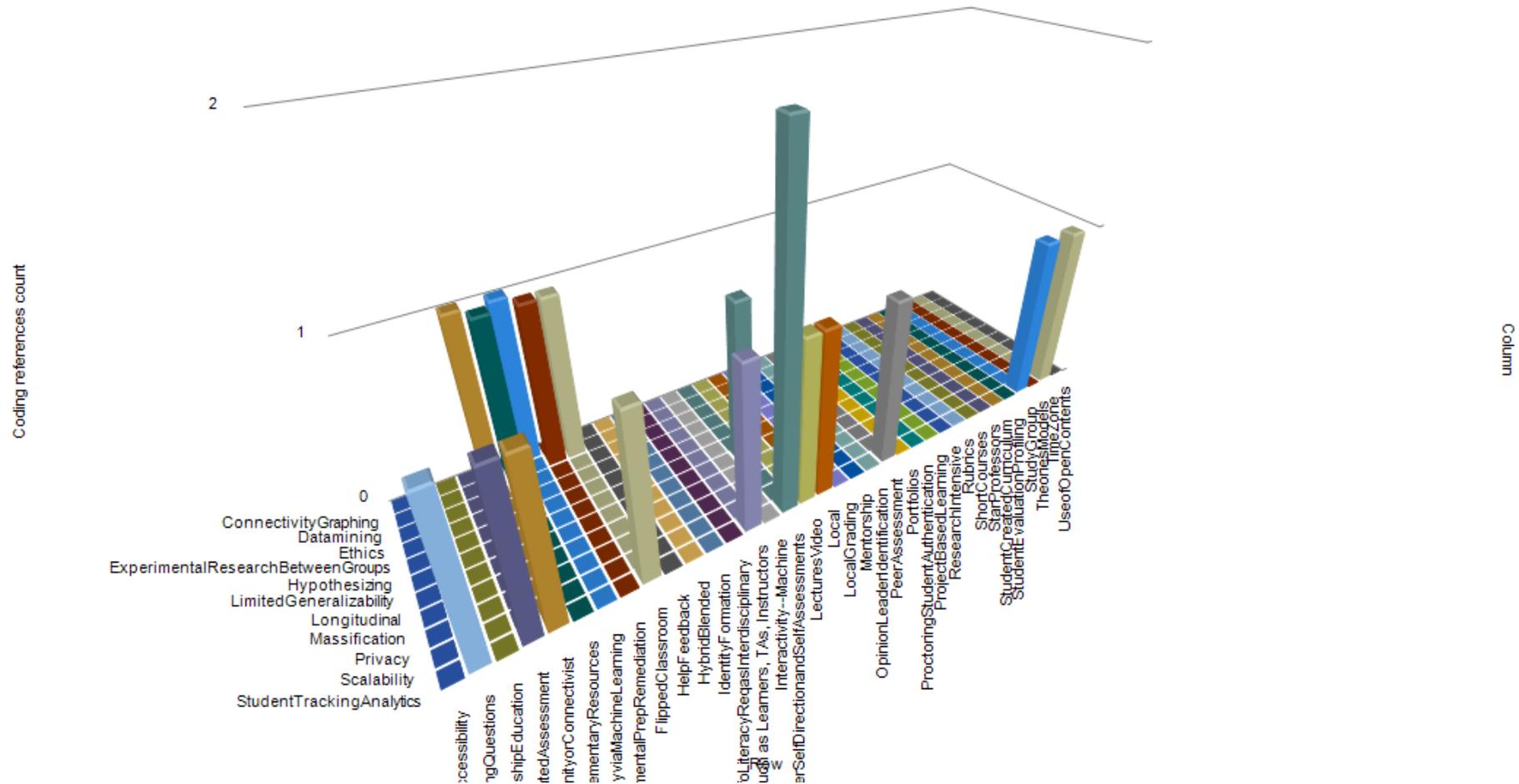
- Menu Bar:** File, Home, Create, External Data, Analyze, Query, Explore, Layout, View.
- Toolbar:** Contains various icons for file operations, coding, and analysis.
- Left-hand Navigation Pane:** Lists various folders and items, including Sources, Nodes, Classifications, Collections, Queries, Reports, Models, and Folders. The "Queries" folder is highlighted with a red box.
- Search and Results Area:** Located at the top, it includes a search bar and a table of search results. The "Queries" folder is highlighted with a red box.
- Main Data Table:** A large table with columns for "Name", "Created On", "Created By", "Modified On", and "Modified By". The table lists various queries and their associated data. The "Queries" folder is highlighted with a red box.

Name	Created On	Created By	Modified On	Modified By
Big Data and Instructional Techniques	9/26/2014 9:07 AM	SHJ	9/26/2014 9:07 AM	SHJ
Items Coded by Attribute Value	9/29/2014 12:22 PM	SHJ	9/29/2014 12:22 PM	SHJ
Sample Proximity Search	9/25/2014 10:11 AM	SHJ	9/25/2014 10:11 AM	SHJ
Saved Source Info Types Group Query	9/29/2014 12:21 PM	SHJ	9/29/2014 12:21 PM	SHJ

Matrix queries are stored in the Queries folder... (unless saved elsewhere by the researcher)

# RELATED DATA VISUALIZATION: MATRIX “CHART”

Big Data and Instructional Techniques - Results Preview



# A RELATIONAL MATRIX TO A NETWORK GRAPH

(READ ACROSS)

	A	B	C	D	E	F	G	H	I
A	--								
B		--							
C			--						
D				--					
E					--				
F						--			
G							--		
H								--	
I									--



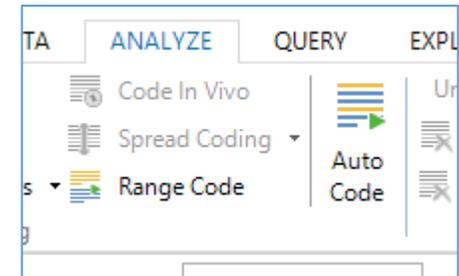
# PATHS USED TO CONDUCT AUTO CODING RESULTING IN INTENSITY DATA MATRICES (IN NVIVO 12 PLUS)

## Theme and subtheme extraction / topic modeling

- Highlight source. (You can use CTRL + A to select all in a folder.)
- In ribbon, select Analyze tab. Click Auto Code Button.
- Select “Identify themes...”
- Proceed with the Auto Code Wizard...

## Sentiment extraction

- Highlight source. (You can use CTRL + A to select all in a folder.)
- In ribbon, select Analyze tab. Click Auto Code Button.
- Select “Identify sentiment...”
- Proceed with the Auto Code Wizard...



Article Analysis Project.nvp - NVivo Plus

FILE HOME CREATE DATA ANALYZE QUERY EXPLORE LAYOUT VIEW

Code Selection At Code Sources At Code In Vivo Uncode Selection At Uncode Sources At

New Node New Node Spread Coding Auto Code This Node Intersecting Content Change Sentiment Memo Link New Annotation New Summary Link

Existing Nodes Existing Nodes Range Code Existing Nodes Existing Nodes Hyperlink See Also Link Delete Annotation Delete Summary Link

Coding Uncoding Links Annotations Framework Matrix

Sources Look for Search In Internals Find Now Clear Advanced Find X

Internals Externals Memos Framework Matrices

Sources Nodes Classifications Collections Queries Reports Maps Folders

SHJ 122 items selected

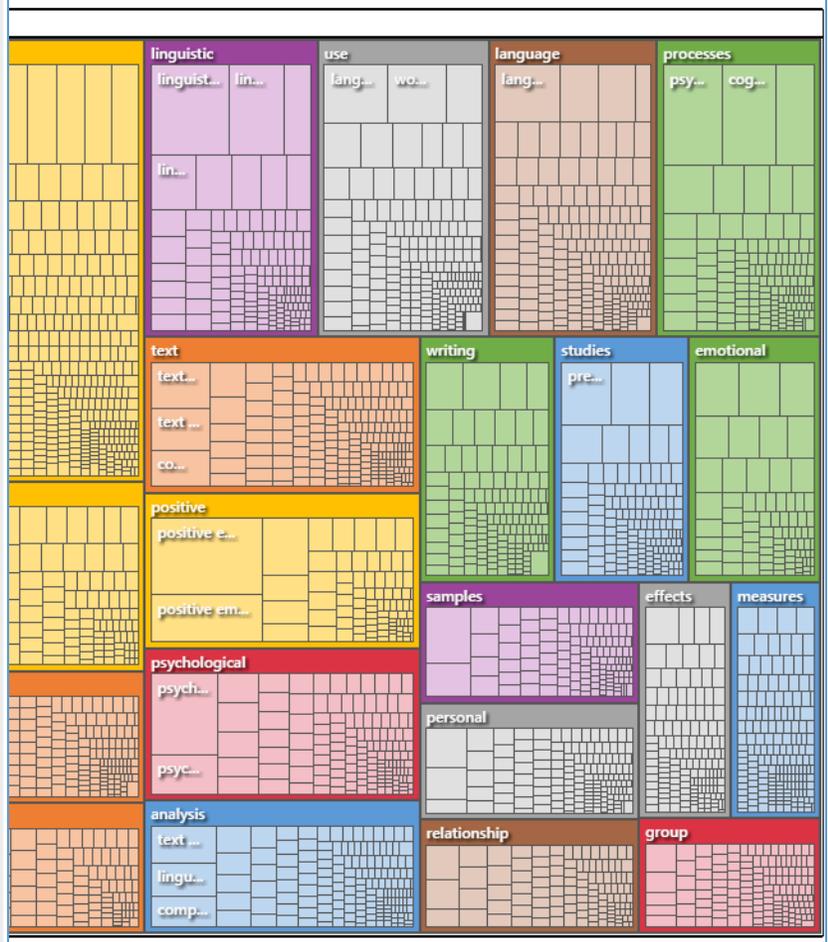
Auto Code Wizard - Step 2 of 4

Identifying themes in the sources you have selected.

Analyzing themes...

Name	Modified On	Modified By
~Automatic or the	4/17/2016 10:03 AM	SHJ
© Carolyn B. Allard	4/17/2016 10:03 AM	SHJ
A Comparative Stud	4/17/2016 10:03 AM	SHJ
A Computerized Te	4/17/2016 10:03 AM	SHJ
Abstracts, introduc	4/17/2016 10:03 AM	SHJ
Am ~l~ more impo	4/17/2016 10:03 AM	SHJ
Analysing weblogs	4/17/2016 10:03 AM	SHJ
Analyzing cockpit c	4/17/2016 10:03 AM	SHJ
Assessing Group In	4/17/2016 10:03 AM	SHJ
Automated Integra	4/17/2016 10:03 AM	SHJ
Automation can lea	4/17/2016 10:03 AM	SHJ
Chapter 4 Assessin	4/17/2016 10:03 AM	SHJ
Cognitive, Emotion	4/17/2016 10:03 AM	SHJ
Comparison of exp	4/17/2016 10:03 AM	SHJ
Computerized text	4/17/2016 10:03 AM	SHJ
Connecting with ot	4/17/2016 10:03 AM	SHJ
ContentServer.pdf	4/17/2016 10:03 AM	SHJ
correspondence	4/17/2016 10:03 AM	SHJ
Counting little wor	4/17/2016 10:03 AM	SHJ
Cross-Cultural Con	4/17/2016 10:03 AM	SHJ
Development and E	4/17/2016 10:03 AM	SHJ
Diaries of signific	4/17/2016 10:03 AM	SHJ
Did Shakespeare w	4/17/2016 10:03 AM	SHJ
Disclosure of traum	4/17/2016 10:03 AM	SHJ
Disclosure of traum	4/17/2016 10:03 AM	SHJ
Doctoral thesis submitted to the Facu	4/17/2016 10:03 AM	SHJ
Double-walled corrugated structure f	4/17/2016 10:03 AM	SHJ
EACL 2014 14th Conference of the Eu	4/17/2016 10:03 AM	SHJ
Effects of (very) brief writing on health	4/17/2016 10:03 AM	SHJ
Effects of Age and Gender on Bloggi	4/17/2016 10:03 AM	SHJ
Effects of Damage to Right-Hemisph	4/17/2016 10:03 AM	SHJ
Effects of disclosure of traumatic eve	4/17/2016 10:03 AM	SHJ

	A : analysis	B : categories	C : effects	D : emotion
1 : Internals\~Automatic or the People~~~ Anger on S...	6	0	0	0
2 : Internals\@ Carolyn B. Allard, 2004	0	0	0	6
3 : Internals\A Comparative Study on English and Chi...	4	37	0	4
4 : Internals\A Computerized Text Analysis can Detect...	4	0	1	3
5 : Internals\Abstracts, introductions and discussions~...	1	0	1	0
6 : Internals\Am ~I~ more important than ~we~~ Coup...	5	9	18	12
7 : Internals\Analysing weblogs of terminally ill patient...	4	1	1	5
8 : Internals\Analyzing cockpit communications~ the li...	0	0	0	0
9 : Internals\Assessing Group Interaction with Social ...	8	3	0	1
10 : Internals\Automated Integrative Complexity	13	1	4	0
11 : Internals\Automation can lead to confounds in tex...	1	0	0	0
12 : Internals\Chapter 4 Assessing Quality of Life thro...	5	3	0	3
13 : Internals\Cognitive, Emotional, and Language Pr...	1	1	7	6
14 : Internals\Comparison of expressive writing after t...	4	5	2	6
15 : Internals\Computerized text analysis of Al-Qaeda...	8	4	1	7
16 : Internals\Connecting with others in the midst of st...	3	7	0	5
17 : Internals\ContentServer.pdf	0	0	0	0
18 : Internals\correspondence	0	0	4	0
19 : Internals\Counting little words in Big Data~ The P...	9	11	5	9
20 : Internals\Cross-Cultural Constructions of Self-Sc...	0	3	0	0
21 : Internals\Development and Evaluation of Tagalog...	6	1	0	1
22 : Internals\Diaries of significant events~ Socio-ling...	4	1	2	0
23 : Internals\Did Shakespeare write Double Falseho...	3	9	0	4
24 : Internals\Disclosure of trauma and immune respo...	2	3	3	4
25 : Internals\Disclosure of traumas and immune funct...	1	0	4	2
26 : Internals\Doctoral thesis submitted to the Faculty ...	6	6	5	17
27 : Internals\Double-walled corrugated structure for b...	7	3	2	3
28 : Internals\EACL 2014 14th Conference of the Eur...	5	5	1	0
29 : Internals\Effects of (very) brief writing on health~ ...	0	0	3	6
30 : Internals\Effects of Age and Gender on Blogging	1	1	0	1
31 : Internals\Effects of Damage to Right-Hemisphere...	3	4	6	15
32 : Internals\Effects of disclosure of traumatic events...	0	0	0	0
33 : Internals\EI Lenguaje de la Depresión ~ Categori...	3	4	2	6
34 : Internals\Emotional Processing of Traumatic Eve...	4	3	2	9
35 : Internals\Everyday Social Behavior During a Maj...	1	2	7	3
36 : Internals\Evolution of Sentiment in the Libyan Re...	2	1	0	4
37 : Internals\Experimental manipulations of perspecti...	2	0	6	0



Article Analysis Project.nvp - NVivo Plus

FILE HOME CREATE DATA ANALYZE QUERY EXPLORE LAYOUT VIEW

Code Selection At Code Sources At Code In Vivo New Node New Node Spread Coding Existing Nodes Existing Nodes Range Code Auto Code

Uncode Selection At Uncode Sources At This Node Intersecting Content Existing Nodes Existing Nodes

Change Sentiment Sentiment Memo Link See Also Link Hyperlink

New Annotation Delete Annotation Annotations New Summary Link Delete Summary Link Framework Matrix Auto Summarize

Sources Look for Search In Internals Find Now Clear Advanced Find

Internals

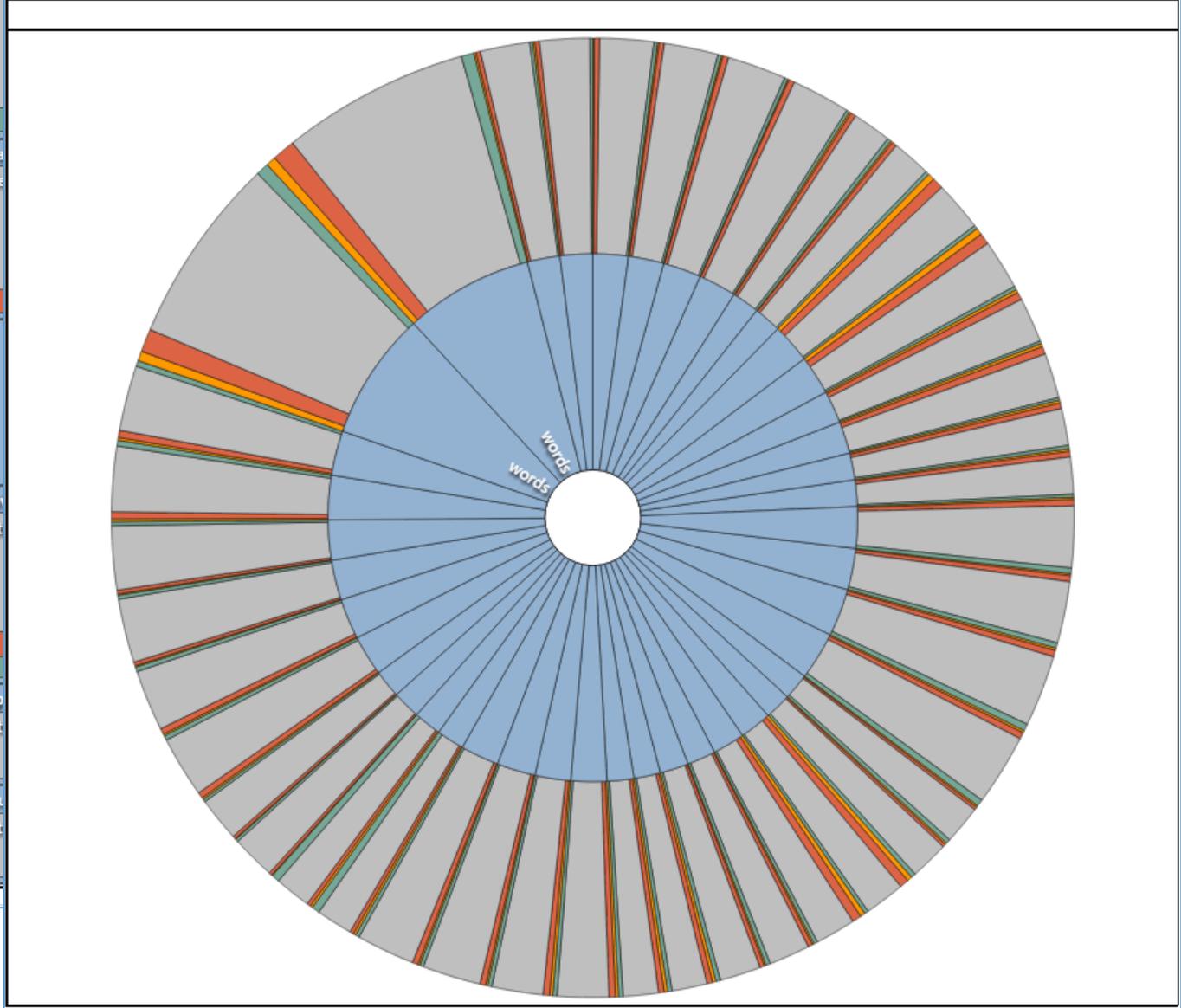
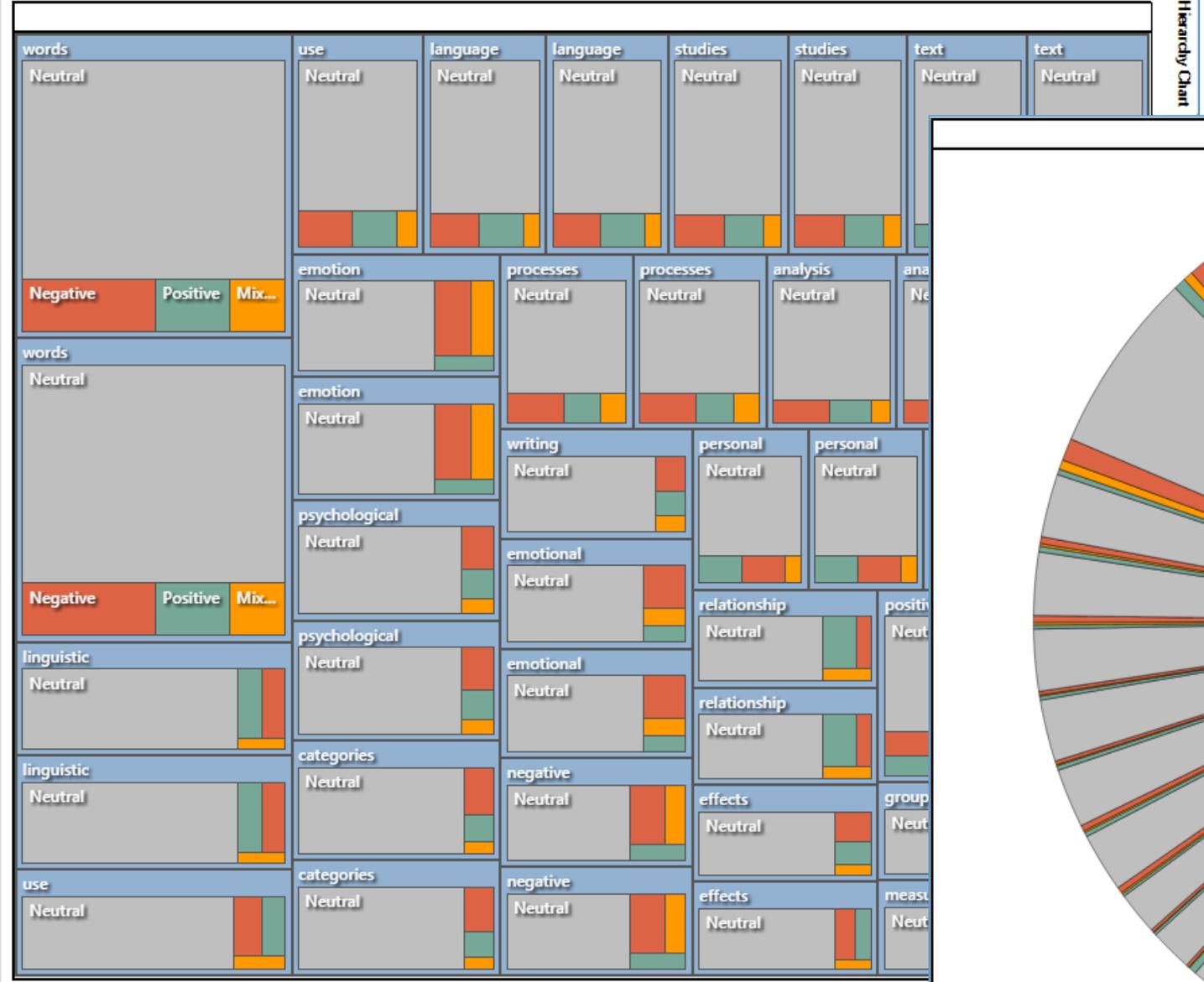
Name	Nodes	Referen
~Auto	49	24
© Caro	115	42
A Com	199	101
A Com	73	52
Abstrac	83	35
Am ~l	455	272
Analyzi	167	92
Analyzi	0	0
Assessi	164	50
Autom	291	175
Autom	47	18
Chapte	165	95
Cogniti	177	118
Compa	169	104
Compu	163	83
Conne	119	63
Conten	0	0
corresp	89	61
Counti	288	146
Cross-	127	71
Develo	147	77
Diaries	124	106
Did Sh	168	98
Disclos	152	79
Disclos	102	84
Doctor	232	612
Double	170	82
EACL 2	290	369
Effects	125	57
Effects	62	23
Effects	182	104

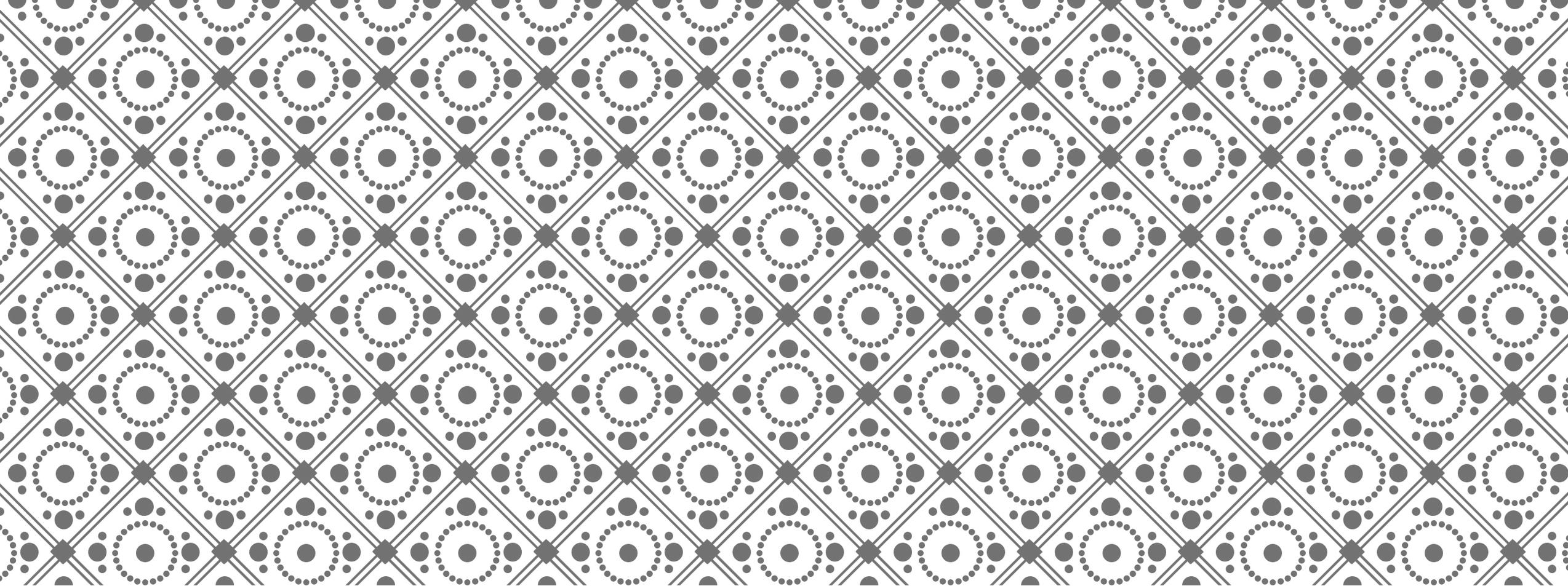
Auto Code Sentiment Results Hierarchy Chart

	A : Very negative	B : Moderately negative	C : Moderately positive	D : Very posit
1 : Internals\~Automatic or the People~~~ Anger on S...	5	16	4	4
2 : Internals\@ Carolyn B. Allard, 2004	12	6	5	4
3 : Internals\A Comparative Study on English and Chi...	7	10	16	10
4 : Internals\A Computerized Text Analysis can Detect...	6	33	25	5
5 : Internals\Abstracts, introductions and discussions~...	6	10	9	7
6 : Internals\Am ~l~ more important than ~we~~ Coup...	52	36	103	16
7 : Internals\Analysing weblogs of terminally ill patient...	17	40	16	6
8 : Internals\Analyzing cockpit communications~ the li...	0	0	0	0
9 : Internals\Assessing Group Interaction with Social ...	0	5	13	2
10 : Internals\Automated Integrative Complexity	29	32	57	32
11 : Internals\Automation can lead to confounds in tex...	7	12	2	3
12 : Internals\Chapter 4 Assessing Quality of Life thro...	20	37	34	13
13 : Internals\Cognitive, Emotional, and Language Pr...	46	45	33	13
14 : Internals\Comparison of expressive writing after t...	34	49	20	9
15 : Internals\Computerized text analysis of Al-Qaeda...	16	23	14	14
16 : Internals\Connecting with others in the midst of st...	20	21	12	5
17 : Internals\ContentServer.pdf	0	0	0	0
18 : Internals\correspondence	19	22	24	17
19 : Internals\Counting little words in Big Data~ The P...	20	41	34	12
20 : Internals\Cross-Cultural Constructions of Self-So...	7	14	34	15
21 : Internals\Development and Evaluation of Tagalog...	23	13	21	16
22 : Internals\Diaries of significant events~ Socio-ling...	34	63	68	32
23 : Internals\Did Shakespeare write Double Falseho...	19	61	33	18
24 : Internals\Disclosure of trauma and immune respo...	35	23	37	11
25 : Internals\Disclosure of traumas and immune funct...	71	43	30	9
26 : Internals\Doctoral thesis submitted to the Faculty ...	585	354	307	98
27 : Internals\Double-walled corrugated structure for b...	8	12	45	18
28 : Internals\EACL 2014 14th Conference of the Eur...	91	212	297	102
29 : Internals\Effects of (very) brief writing on health~ ...	20	8	10	0
30 : Internals\Effects of Age and Gender on Blogging	1	12	10	2
31 : Internals\Effects of Damage to Right-Hemisphere...	29	62	28	6
32 : Internals\Effects of disclosure of traumatic events...	0	0	0	0
33 : Internals\EI Lenguaje de la Depresión ~ Categori...	25	22	29	10
34 : Internals\Emotional Processing of Traumatic Eve...	46	29	36	7
35 : Internals\Everyday Social Behavior During a Maj...	33	90	27	11
36 : Internals\Evolution of Sentiment in the Libyan Re...	18	16	14	8
37 : Internals\Experimental manipulations of perspecti...	10	32	30	12

Sources Nodes Classifications Collections Queries Reports Maps Folders

SHJ 0 Items Cell content : Coding references count Unfiltered





## 4. SPECIFIC MATRIX “USE CASES” . . .

In Qualitative and Mixed  
Methods Research

# MACHINE-READING RESEARCH ARTICLES (OR OTHER TEXTS) FOR THEMES AND SUB-THEMES

(TO SAVE ON HUMAN “CLOSE READING,” ESP. OF RELATIVELY “BIG DATA” CORPUSES USING AUTOCODING)

	Theme or Concept or Phenomena or Individual (keyword or phrase)	Theme or Concept or Phenomena or Individual	Theme or Concept or Phenomena or Individual	Theme or Concept or Phenomena or Individual
Research article (or source) #1				
“				
“				
“				
“				
“				

# COMPARING AND CONTRASTING RESEARCH SUBJECT RESPONSES BY CATEGORICAL GROUPINGS

	Sex	Age Group	Birthplace	Ethnicity	Income Level	Marital Status
Variable						

# COMPARING AND CONTRASTING RESEARCH SUBJECT RESPONSES BY (CATEGORICAL) OUTCOMES

	On-time Graduation	Late Graduation	Withdrawal
Variable			

# EXPLORING POTENTIAL LOCATIONAL OR SPATIAL PATTERNS

	Location #1	Location #2	Location #3	Location #4
Interview Subject #1 / or Nodes / or ... etc.				
#2				
#3				
...				

# EXPLORING POTENTIAL TIME PATTERNS (LIKE CHANGES OVER TIME, LIKE PRE-POST EVENT TIME CHANGES)

	Time Period 1	Time Period 2	Time Period 3	Time Period 4
Variable				
Variable				
Variable				
...				

# IDENTIFICATION OF OVERLAPS IN CODIFIED THEMES (MATRIX CODING QUERIES)

	Node	Node	Node...	
Node				
Node				
Node...				

# OUTLIER CASE COMPARISONS

	Outlier Case A			
Outlier Case Z				

# COMPARING SENTIMENTS, EMOTIONS, ATTITUDES, AND BELIEFS

	Sentiments	Emotions	Attitudes	Beliefs...
Interviewee #1				
...				

# CROSS-QUERY RESPONSE ANALYSIS (COMPARISONS AND CONTRASTS)

	Question 1 Responses			
Question 2 Responses				

# COMPARING CHANGES ACROSS TIME PERIODS

(TYPES OF TIME: DISCRETE, PERIODIC, CONTINUOUS; SHORT-TERM VS. LONGITUDINAL)

	Time Period #1	Time Period #2	...	
Variables of a Type				

# INTER-RATER RELIABILITY (SIMILARITY/DIFFERENCE ANALYSIS)

	Coder A Coding			
Coder B Coding				

# AUTOMATED SENTIMENT ANALYSIS

	Positive		Negative	
	Very Positive	Moderately Positive	Moderately Negative	Very Negative
<b>Tweetstreams</b>				
<b>Interviews</b>				
<b>Facebook Postings</b>				
<b>Survey Responses Organized by Topic</b>				
<b>Newspaper Articles on a Specific Topic</b>				
<b>Ad Hoc #Hashtag Discussions</b>				
<b>Others...</b>				

# ALSO QUANT-BASED CROSS-TABULATION ANALYSES

(USED WITH NON-PARAMETRIC CATEGORICAL DATA)

Matrix Variables ("**Banners**" / Column Headers)

	A			
1				
	<b>Data Cells with Counts</b>			
<b>Matrix Variables</b> <b>("Stubs" / Row Headers)</b>	<b>Need to Calculate:</b>			
	$(\text{Observed Variables} - \text{Expected Variables})^2 / \text{Expected Variables}$			
	<b>Need to calculate chi-squared</b>			
	<b>Need to calculate p (statistical significance level)</b>			
	<b>Need to calculate degrees of freedom (df) = (banners - 1)(stubs - 1)</b>			

# ALSO QUANT-BASED CROSS-TABULATION ANALYSES (CONT.)

(aka contingency tables)

Contrasting what is expected (if there is nothing acting on the variables) vs. what is observed

Results in associational observations (not causal ones), insufficient power to assert causation

Chi-square analysis based on:

- raw number counts and percentages:  $(\text{actual observations} - \text{expected observations})^2 / \text{expected observations}$
- Goodness-of-fit test (from pure randomness / null hypothesis to some form of non-randomness or patterning)
- Test of independence of variables (Of two categorical variables from one population: Is there any association between the two variables? Can the level or incidence of one be used as a possible predictor of the other variable?)

# ALSO QUANT-BASED CROSS TABULATION ANALYSES (CONT.)

Degrees of freedom (df) = (number of banners – 1)\*(number of stubs – 1)

- df consists of the mean of the chi square distribution
- df is used to calculate statistical significance of a chi-square statistic and the (in)validity of the null hypothesis

Minimum of 2x2 tables but may be much larger

p-value (probability of obtaining a particular observed result )

A value used to assess statistical significance ( $p < .05$ ,  $p < .01$ , or other)

Will need to transfer table to another tool ([Excel](#), [Qualtrics](#)) for the complete cross-tabulation analysis (by setting up a pivot table, calculating expected frequencies, calculating observed frequencies, frequency distributions, percentages of columns and of rows, etc.

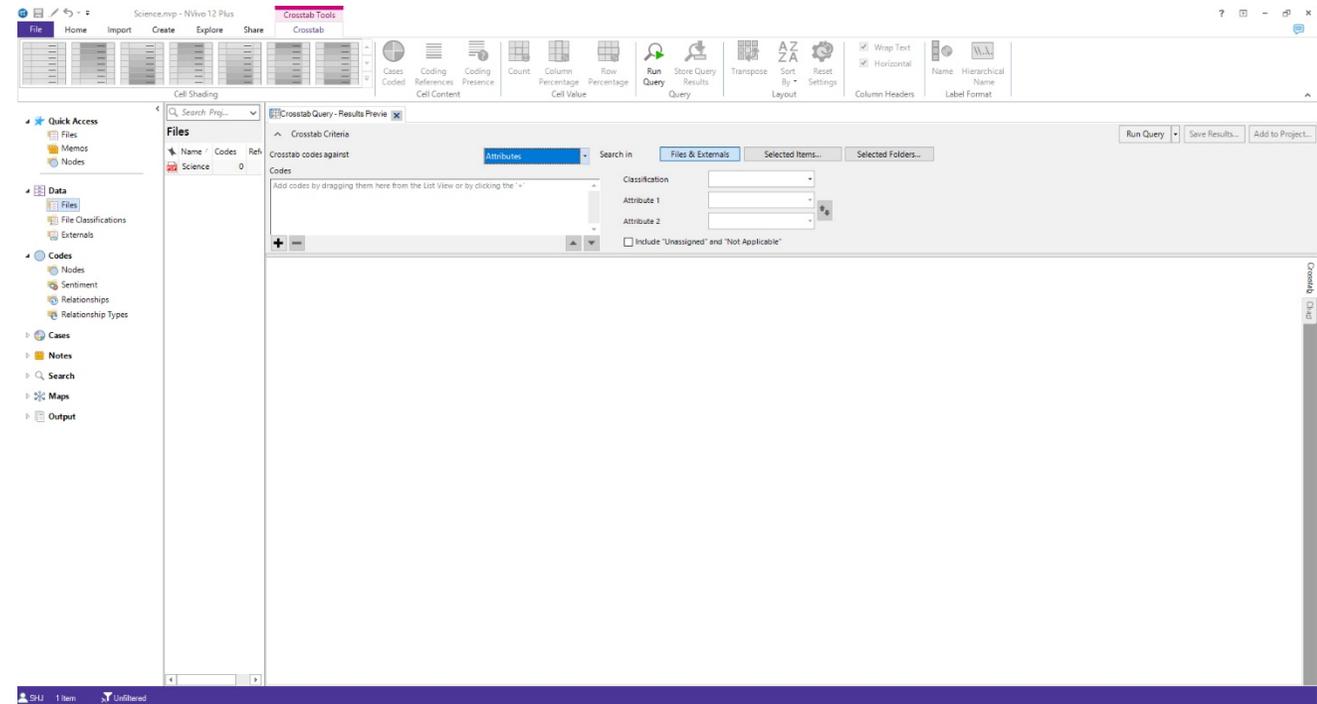
# QUALITATIVE CROSS-TABULATION ANALYSIS IN NVIVO 12 PLUS

The newest version of NVivo enables a qualitative cross-tabulation analysis, which is built off of a matrix. Basically, users may cross-reference selected cases (individual persons or “egos,” groups or “entities”) or demographic attributes against various folders...or codes (themes / topics)... to identify relationships that may be otherwise latent.

The respective cells contain numbers.

No chi-squared analysis or statistical significance number is calculate.

The result is an intensity matrix based on number counts alone.



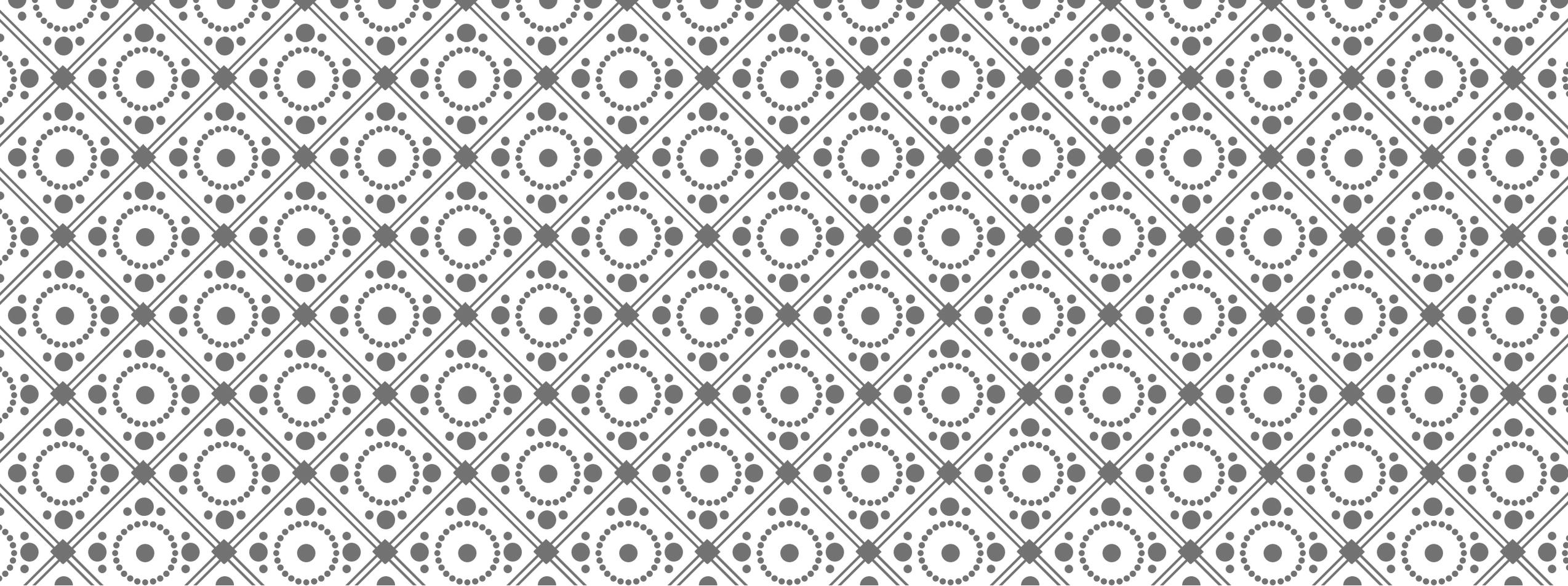
# ADDING VALUE TO QUALITATIVE CROSS-TABULATION ANALYSES

Use case nodes (egos/individuals and entities/groups)

Use classification sheets to enable the grouping of egos and entities based on demographic and other (defined) dimensions / attributes / factors

Hypothesize *a priori* based on qualitative cross-tabulations

Hypothesize in a *post hoc* way based on cross-tabulations (but be sure to indicate these as such)



# WRAP-UP

# WHERE MATRICES COME FROM

Not all matrices come from matrix queries or matrix coding queries

Some forms of autocoding / machine learning (sentiment analysis, theme and sub-theme extraction) result in intensity matrices that are used to report out the findings

From the matrices, various data visualizations may be created, including bar charts, social network graphs (from Twitter®), and hierarchy charts (treemap and sunburst diagrams in NVivo 12 Plus)

# EXPORT OF MATRICES

Matrices export out as .txt, .xl, and .xlsx formats

Extracted data (highly portable) may be analyzed in other software tools and in other ways

~ to a data table, for some of the autocoded matrices:

- Column headers are variables
- Rows are records

K-State MOOC Feasibility Study (NVivo 11) (3).nvp - NVivo Plus

FILE HOME CREATE DATA ANALYZE QUERY EXPLORE LAYOUT VIEW

Go Refresh Open Properties Edit Paste Copy Merge Cut Copy Merge Format Paragraph Styles Editing Proofing

Workspace Item Clipboard Format Paragraph Styles Editing Proofing

Nodes Look for Search In Node Matrices Find Now Clear Advanced Find

Nodes

- Auto Coded Sample Tem
- Autocoded Themes
- Autocoding by Paragraph
- Costs
- Instructional Techniques
- Management
- ModifiedEDelphiSurvey
- MyCollection.RIS from M
- Open Sourcing
- Research, Big Data
- Second Autocoding Run
- Technologies
- Cases
- Sentiment
- Relationships
- Node Matrices

Sources

Nodes

- Classifications
- Collections
- Queries
- Reports
- Maps
- Folders

Node Matrices

Auto Code Themes Results 4-

	A : analysis	B : categories	C : effects
1 : Internals\FromMendeley\Automatic or the Peopl...	6	0	0
2 : Internals\FromMendeley\Carolyn B. Allard, 2004	0	0	0
3 : Internals\FromMendeley\A Comparative Study on ...	4	37	0
4 : Internals\FromMendeley\A Computerized Text An...	4	0	1
5 : Internals\FromMendeley\Abstracts, introductions ...	1	0	1
6 : Internals\FromMendeley\Am "I" more important t...	5	9	18
7 : Internals\FromMendeley\Analysing weblogs of ter...	4	1	1
8 : Internals\FromMendeley\Analyzing cockpit comm...	0	0	0
9 : Internals\FromMendeley\Assessing Group Interac...	8	3	0
10 : Internals\FromMendeley\Automated Integrative ...	13	1	4
11 : Internals\FromMendeley\Automation can lead to ...	1	0	0
12 : Internals\FromMendeley\Chapter 4 Assessing Q...	5	3	0
13 : Internals\FromMendeley\Cognitive, Emotional, a...	1	1	7
14 : Internals\FromMendeley\Comparison of expressi...	4	5	2
15 : Internals\FromMendeley\Computerized text anal...	8		
16 : Internals\FromMendeley\Connecting with others ...	3		
17 : Internals\FromMendeley\ContentServer.pdf	0		
18 : Internals\FromMendeley\correspondence	0		
19 : Internals\FromMendeley\Counting little words in ...	9		
20 : Internals\FromMendeley\Cross-Cultural Constr...	0		
21 : Internals\FromMendeley\Development and Evalu...	6		
22 : Internals\FromMendeley\Diaries of significant ev...	4		
23 : Internals\FromMendeley\Did Shakespeare write ...	3		
24 : Internals\FromMendeley\Disclosure of trauma an...	2		
25 : Internals\FromMendeley\Disclosure of traumas a...	1		
26 : Internals\FromMendeley\Doctoral thesis submitt...	6		
27 : Internals\FromMendeley\Double-walled corrugat...	7		
28 : Internals\FromMendeley\EACL 2014 14th Confer...	5		
29 : Internals\FromMendeley\Effects of (very) brief wr...	0		
30 : Internals\FromMendeley\Effects of Age and Gen...	1		
31 : Internals\FromMendeley\Effects of Damage to Ri...	3	4	6
32 : Internals\FromMendeley\Effects of disclosure of t...	0	0	0
33 : Internals\FromMendeley\EI Lenguaje de la Depr...	3	4	2
34 : Internals\FromMendeley\Emotional Processing o...	4	3	2
35 : Internals\FromMendeley\Everyday Social Behavi...	1	2	7
36 : Internals\FromMendeley\Evolution of Sentiment i...	2	1	0
37 : Internals\FromMendeley\Experimental manipulat...	2	0	6

Open Node Matrix Cell

- Export Node Matrix... Ctrl+Shift+E
- Print Ctrl+P
- Copy Ctrl+C
- Links
- Cell Content
- Cell Shading
- Transpose
- Row
- Column
- Reset Settings
- Sort By
- Node Matrix Properties... Ctrl+Shift+P

SHJ 11 Items Cell content : Coding references count Unfiltered

# ADDITIONAL QUESTIONS?

What are some other types of matrix queries possible based on your own research? How would you set up your matrix query, and why? (Is there a manual equivalency to a computerized matrix query? A computerized equivalency outside of NVivo? How would that work (in either case)?)

What can matrix queries tell you that you could not find out otherwise? (Or if the matrix query is not possible, what are some other ways to surface and discover the same information?)

How would you present matrix query findings in a presentation? A research paper? [When would you keep a matrix query's findings on background (just for your analysis)? When would you put a matrix query's findings on foreground (in publications and presentations for the public consumption)?]

# ADDITIONAL QUESTIONS? (CONT.)

How would you use some matrix data visualizations with data created in autocoded / auto-created ways?

How would you represent the findings?

Besides bar charts, what are some other ways to represent matrix data?

- What about relational matrices expressed as network graphs? (a very common visualization)

# CONCLUSION AND CONTACT INFORMATION

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The presenter has no formal tie to QSR International.

The student subscription version of NVivo 12 Plus (available for about \$70 a year for a two-year subscription) enables matrix queries and matrix-based visualizations. It is a full performance version of the software.