



## MANTRA NVIVO 9 DATA HANDLING EXERCISE

### Unit 3: Managing your data at the end of your project

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## Overview – Unit 3

This unit deals with issues you need to consider at the post analysis stage of your research, when you are ready to export your data and documentation from NVivo 9 for archiving or to make them available to other researchers for reuse. We will present some recommendations on the following issues:

- exporting data and documentation for archiving including advice on preservation-friendly formats and exporting contextual information about your data created within the NVivo 9 project file.
- managing your bibliographical data and resources created or imported in NVivo 9 and advice on exporting them for use with reference management software.

## 1 Exporting data and documentation for archiving

After creating, processing and analysing your data, it is now time to consider how best to export them from NVivo 9 to ensure they can be preserved and appropriately archived for the future either for your own reuse for further research or for sharing your data with other researchers, allowing them to reuse your data.

As we outlined in sections 4.2 and 4.3 in Unit1, one of the first things to consider is the formats you will export your data into. Note that for long-term use and preservation purposes you **should not export your data in a single NVivo 9 project file only**, as it is proprietary. Table 1.1 presents an overview of the data and documentation export formats recommended for archiving by the UK Data Archive. In the sections that follow, we will look in more detail at how to export different NVivo 9 project file objects.

UK Data Archive preferred formats for data and documentation export for archiving	
<b>Textual data</b>	.rtf, .txt, html
<b>Tabular data</b>	.xls, .txt
<b>Image</b>	.jpg (not ideal – keep preservation copies of images separate from NVivo in .tiff format, if available)
<b>Audio</b>	.wav, .mp3
<b>Video</b>	.mp4
<b>Textual documentation</b>	.rtf, .txt, .xml, .pdf, html
<b>Tabular documentation</b>	.xls, .txt

Table 1.1 UK Data Archive recommended formats for data and documentation export for archiving

### 1.1 Exporting your data (textual, tabular, audio, video or image)

NVivo 9 allows you to export **textual data files** (like your internal and external sources or memos) in different formats with MS Word (.doc, .docx) files being the default format. Additionally, you can export your memos or documents in .txt, .rtf, .pdf or .html format, but .txt and .rtf formats are recommended for long-term preservation and access.



3-1.

Export the 2000int002 file in the Internals\\Text\\Face-to-face\_interview\_transcripts\\ 3.Coded folder in .rtf format, including all available additional options. Open the exported document and see what was exported.

To export a **document or memo**, select it, then right-click on **Export>Export Document/Memo** or type **CTRL+SHIFT+E** (Figure 1.1). Make sure that you include all properties and related content, checking that the following boxes are selected: **Name with Format** set as **Folder and Name**, **Description**, **Other Properties**, **Annotations**, **Relationships**, **See also links** and **Memo links**, as shown in Figure 1.2. After this, NVivo 9 will ask where you would like to save the file and it should have defaulted to the directory you provided in section 4.7 in Unit 1 as the default export location.

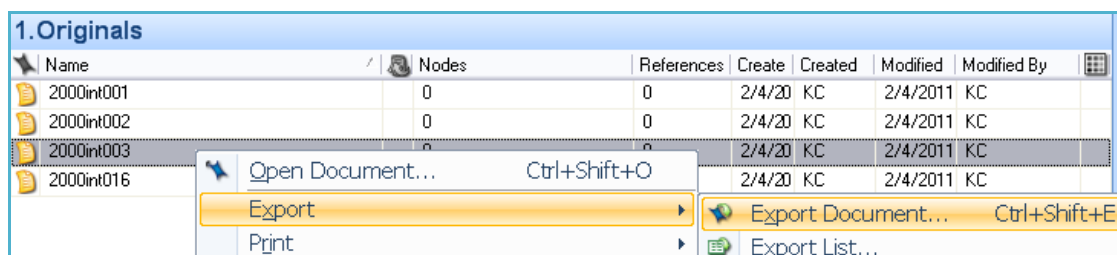


Figure 1.1 Exporting a textual data file

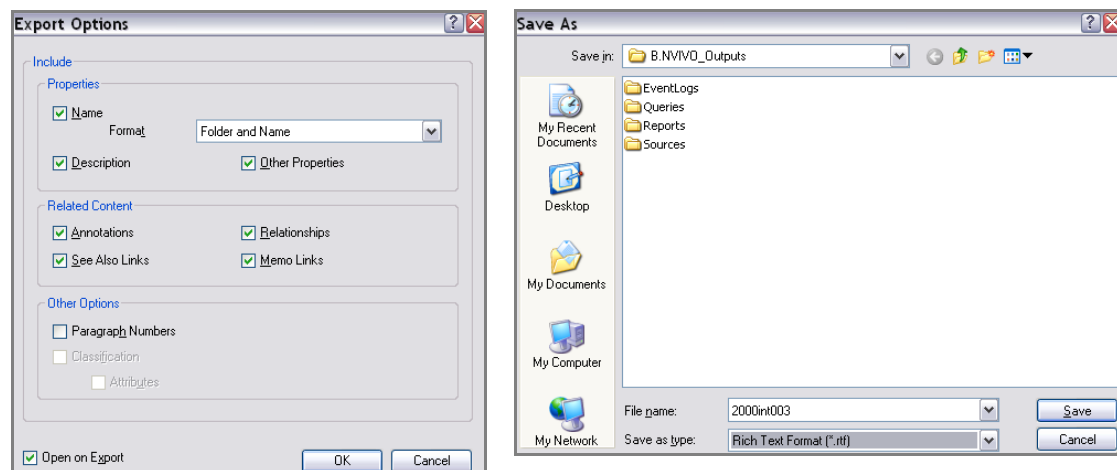


Figure 1.2 Export options

Figure 1.3 Saving as an .rtf file in the default export directory

Contextual information about the document or memo will also be exported as part of your document (before the data) and any related content information will appear at the end of it. When exporting a document that you have classified, you can also export information about the classification used and its attributes. Note that this information will be exported as text, as part of the coversheet and not as classifications that you can directly import into another NVivo project. For some examples of the different exported documents, see the relevant appendix in \\Memos\ExerciseAppendices folder in 2000-nvivo9-demo.nvp.



3-2.

Export the 2000ulist file in the Internals folder in .xls and .txt format as a dataset, including all available additional options. Open the exported dataset and see what was exported.

Similar steps apply when you would like to export **tabular data** (e.g. datasets): select the dataset, then click on **Export>Export Dataset** (Figure 1.4). Ensure that all boxes are selected: **Name** with **Format** set as **Folder and Name**, **Description**, **Other Properties**, **Annotations**, **Relationships**, **See also links**, **Memo links**, **Record ID** and **Column Headers**, as shown in Figure 1.5. You can also select **Open on Export**, if you would like to view the file after exporting it.

NVivo 9 allows you to export datasets as .xls, .xlsx, .txt, or .html files – with .xls and .txt being the recommended formats for long-term preservation. Note that exporting in .xls, .xlsx and .txt formats will also export information about the Filename and path, the dataset description the created on and by information, the last modified on and by information and the file size. It will **not** export information about your data about links to memos, relationships, annotations, and see also links, however: to do that, you will need to export the dataset as an .html file, which makes the data unusable, as you cannot import them back or edit them, or export the dataset as part of the NVivo 9 project file. What we recommend is that you **export 2 versions of the dataset**: one in .xls or .txt formats for editing and further analysis and

one in .html, which you will use to refer to the additional resources that you have linked this dataset to.

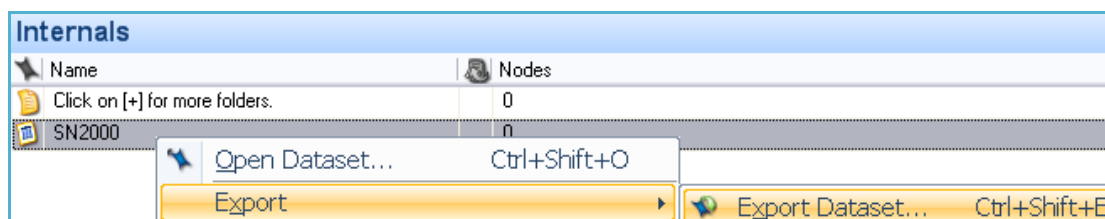


Figure 1.4 Exporting tabular data

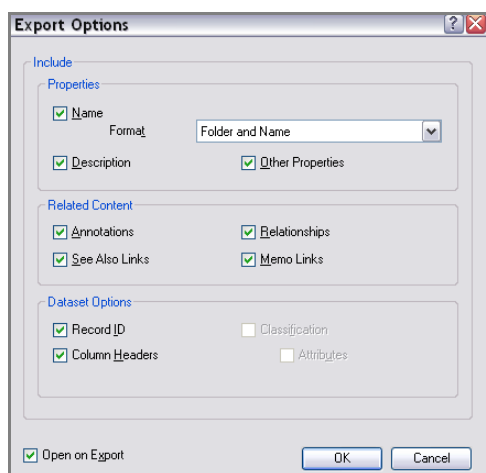


Figure 1.5 Export options for datasets

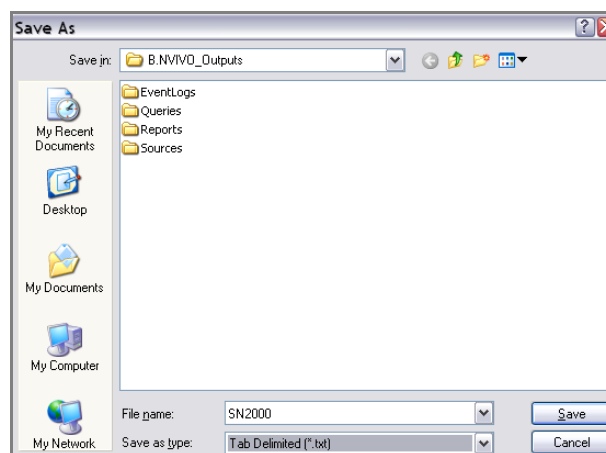


Figure 1.6 Saving as a.txt file in the default export directory

3-3.

Export the entire content, transcript/log only or media item of some pictures, audio and video files in the Internals folder in appropriate formats, including all available additional options. Open the exported documents and see what was exported.

To export **audiovisual objects (audio, pictures or video)**, select the object, then click on **Export>Export Audio/Transcript** (for audio), **Export>Export Picture/Log** (for pictures) or **Export>Export Video/Transcript** (for video). NVivo 9 will allow you to export either:

- the entire content as an .html file (the object plus any logs or transcripts) (Figure 1.8)
- the object only (Figure 1.9) or
- the transcript or log as a .doc, .docx, .txt, .rtf, .pdf or .html, with .txt and .rtf as the recommended formats for long term preservation and access (Figure 1.10)

Note that you can only export related content (like links to memos, annotations and see also links) when exporting the **Entire Content** of the object (Figure 1.8) and that you can export the object only in the format it was imported in (Figure 1.11). This highlights the importance of converting your media files to preservation-friendly formats before import, raised in section 4.3 in Unit 1.

For long term preservation and access, it is recommended that you export the object and the log/transcript file separately in the recommended formats. You can also export an .html (entire content) version, in case you would like to refer to the related content in the future.

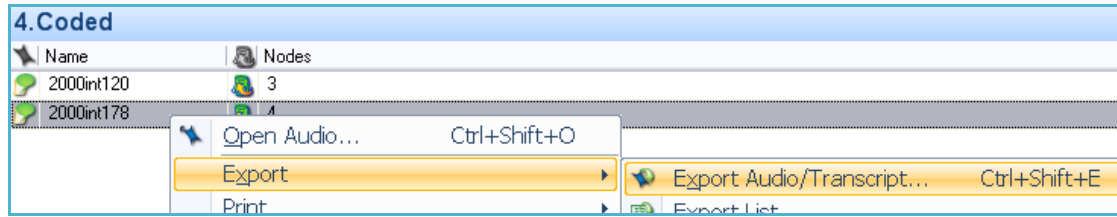


Figure 1.7 Exporting audio files

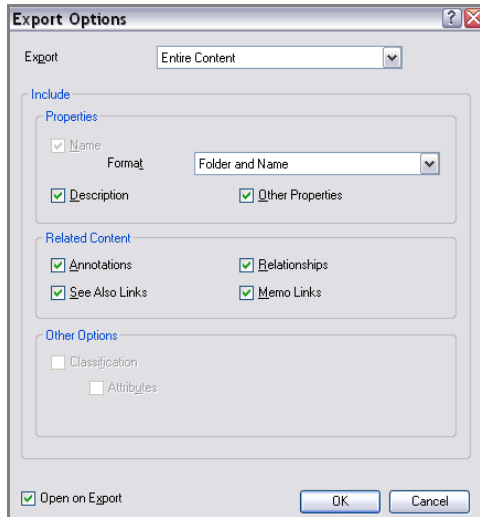


Figure 1.8 Exporting the entire content (audio and transcript)

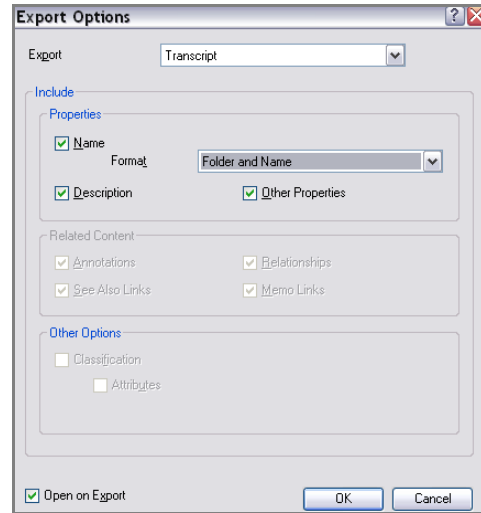


Figure 1.10 Exporting the transcript

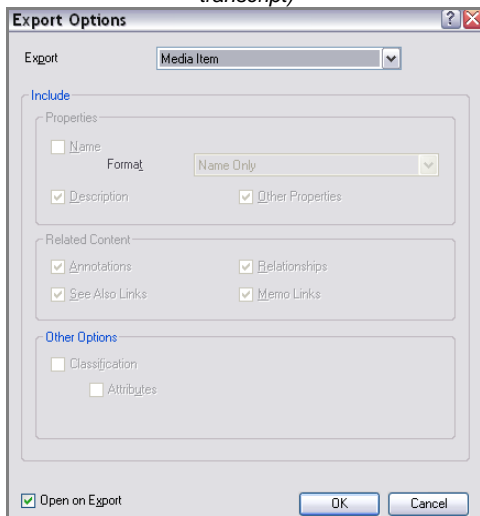


Figure 1.9 Exporting only the media file (audio)

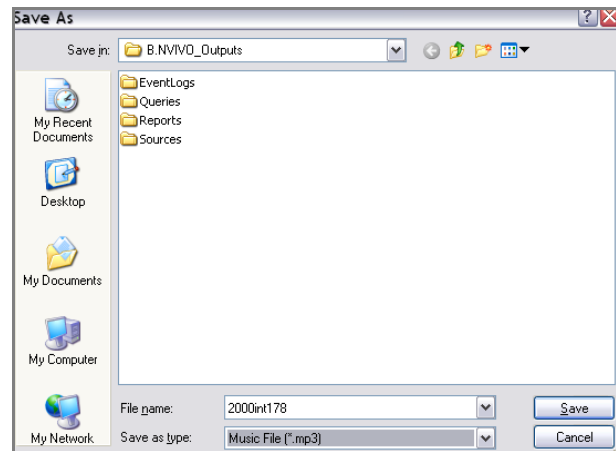



Figure 1.11 Saving an audio file at the default directory (you can only export in the format you imported)

## 1.2 Exporting your coding (exporting nodes and node structure)

Exporting your coding scheme in appropriate formats will ensure that you or other researchers will have access to your analytic framework. Unfortunately, NVivo 9 does not let you export coded sources as you view them in NVivo 9 (i.e. as a highlighted document), but instead it allows you to export your coding in the following ways:

- A. a summary view of the node references
- B. a reference view of the node references
- C. an html version of the entire content
- D. a summary of a collection of nodes
- E. a summary of the node structure

 Export the following from your NVivo 9 project file:

3-4.

- a) a summary view of the node references
- b) a reference view of the node references
- c) an html version of the whole content
- d) a summary of a collection of nodes
- e) a summary of the node structure

To export a summary view of the node references, right-click on the node, then select **Export>Export Node** (Figure 1.12) In the **Export Options** window, select **Export as Summary** view and save as an .rtf file (Figure 1.13).

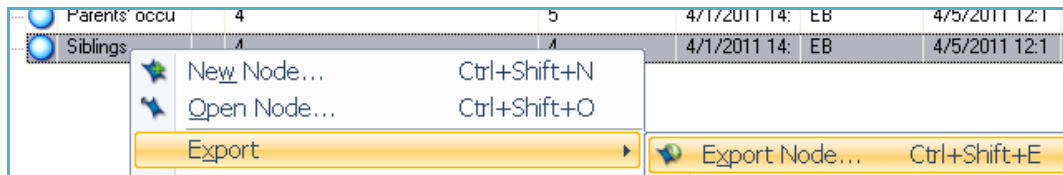


Figure 1.12 Exporting a node

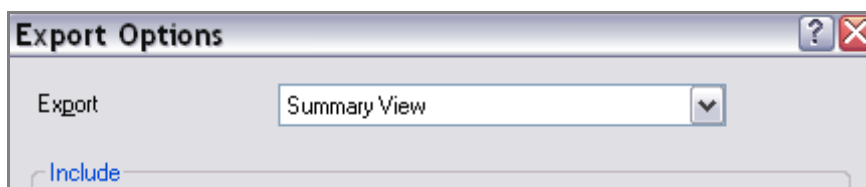


Figure 1.13 Exporting the node in a summary view

An example output follows:

Type	Name	In Folder	References	Coverage
Document	2000int001	Internals\\Text\\Interviews\\3.Coded	1	0.06%
Document	2000int002	Internals\\Text\\Interviews\\3.Coded	1	0.05%
Document	2000int003	Internals\\Text\\Interviews\\3.Coded	1	0.11%

To export a reference view of the node references, right-click on the node, then select **Export>Export Node** (Figure 1.12). In the **Export Options** window, select **Export as Reference View** and save as an **.xls** or an **.rtf** file (Figure 1.14). Make sure that all the boxes under **Properties** (**Name with Format** set as **Folder and Hierarchical Name, Description**), **Related Content** (**annotations, relationships, see also links and memo links**) and **Other Options** (**Paragraph Numbers**) are selected.

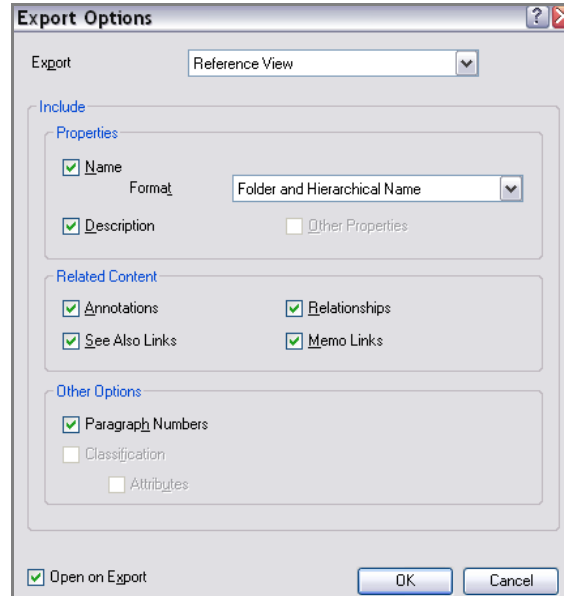


Figure 1.14 Exporting the nodes in a reference view

Here is an example output for the *Siblings* node:

**Name:** Nodes\\Siblings

**Description:** This is the description of the siblings node

<Internals\\Text\\Interviews\\3.Coded\\2000int001> - § 1 reference coded [0.06% Coverage]

Reference 1 - 0.06% Coverage

¶15: So you were approximately 7 boys, is that right, and 4 girls

<Internals\\Text\\Interviews\\3.Coded\\2000int002> - § 1 reference coded [0.05% Coverage]

Reference 1 - 0.05% Coverage

¶62: Well, let's see. Three, five. Yes. Five altogether? Yes.

<Internals\\Text\\Interviews\\3.Coded\\2000int003> - § 1 reference coded [0.11% Coverage]

Reference 1 - 0.11% Coverage

¶9: You told me that you had four brothers and two sisters?

¶10: ED : That's - three - yes two sisters - that's seven all together. Yes, that's right

**Linked Memo**  
Memos\\memo5

To export an html version of the entire content, right-click on the node, then select **Export>Export Node**. In the **Export Options** window, select **Export as Entire Content** and save as an **.html** file (Figure 1.15). Make sure that all the boxes under **Properties** (**Name with**



Format set as Folder and Hierarchical Name, Description, Other properties), Related content (annotations, relationships, see also links and memo links) and Other Options (Paragraph Numbers, Classification) are selected.

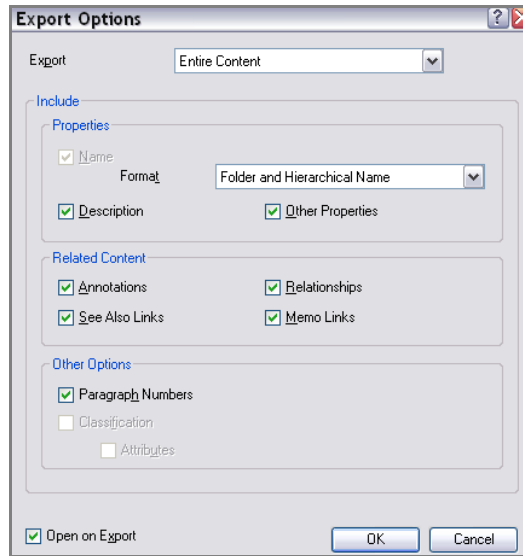


Figure 1.15 Exporting the entire content of the nodes

Here is an example output for the *Siblings* node (summary and text view):

Nodes\Siblings
NVIVO

SUMMARY
TEXT

### Overview

NODE TYPE	Node
AGGREGATED?	No
DESCRIPTION	This is the description of the siblings node

### Content

#### Text

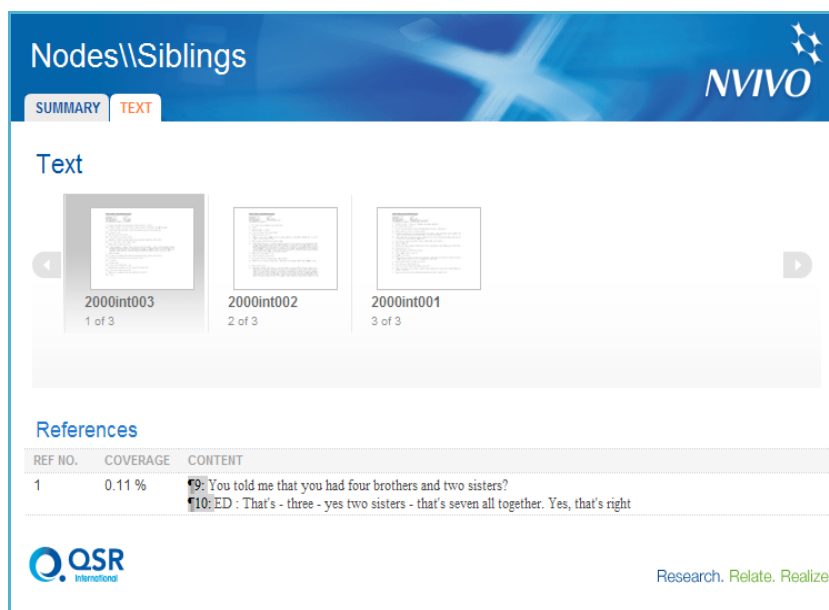
FILE & LOCATION	REFERENCES	COVERAGE	
Internals\Text\Interviews\3.Coded\2000int003	1	0.11 %	<a href="#">view details</a>
Internals\Text\Interviews\3.Coded\2000int002	1	0.05 %	<a href="#">view details</a>
Internals\Text\Interviews\3.Coded\2000int001	1	0.06 %	<a href="#">view details</a>

### Links

#### Linked Memo

Memos\memo5

Research. Relate. Realize.



To export a summary of a collection of nodes, run a *Node Summary Extract Report* (Folders>Extracts>Node Summary Extract), (Figure 1.16) select the nodes you would like to export the information about, and save as .txt, .xml, or .xls file. If the extract report is successfully generated, NVivo 9 will prompt you with a message.

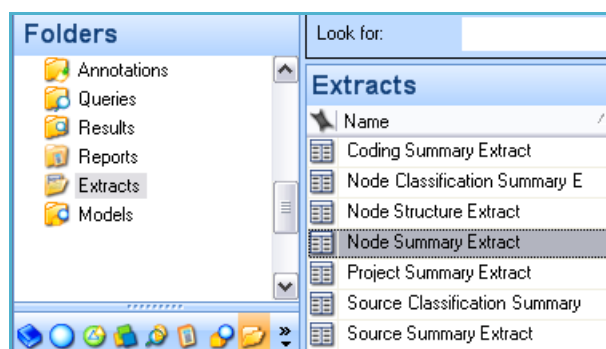


Figure 1.16 Running a Node Summary Extract Report

To export a summary of the node structure, run a *Node Structure Extract Report* (Folders>Extracts>Node structure Extract), select the nodes you want to export the information about (Figure 1.17) and save as .txt, .xml, or .xls file.

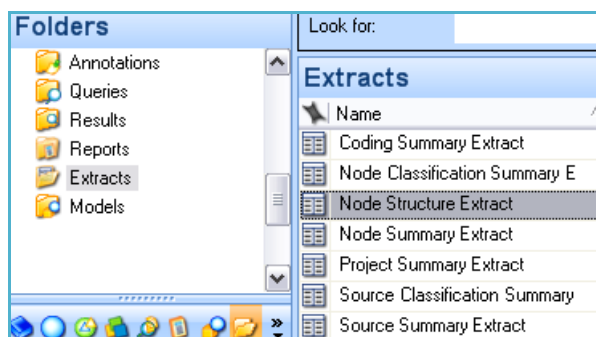


Figure 1.17 Running a Node Structure Extract Report

### 1.2.1 Exporting classifications (and classification structure)

You can export source and node classifications as classification sheets that you can then import to another project or use to create a dataset.



3-5.

Export the following:

- a) the book source classification as an .xls file
- b) all source classifications as a .txt file
- c) the interview node classification sheet as an .xls file
- d) all node classifications as a .txt file

To export one or more classifications as a classification sheet, select them, then select **Export>Export Classification Sheets** (Figure 1.18). On the **Export Classification Sheets** window (Figure 1.19) select to export the sheet to your preferred location, but make sure the .xls format is selected (and not the default .xlsx). Modify the rest of the options as appropriate, then click on OK. If you are exporting multiple classifications, they will be represented in different workbooks in the same spreadsheet.

Source classifications can also be exported as a bibliography list in endnote .xml, .txt or .ris format. Select the source classification(s) you would like to export the references of, then select **Export>Export Bibliographical data** (Figure 1.20).

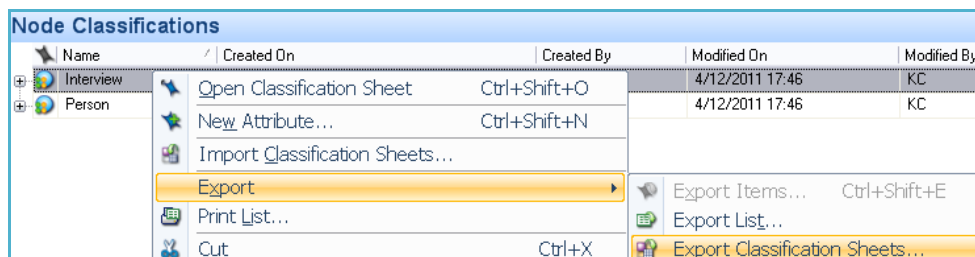


Figure 1.18 Example of a node classification sheet export

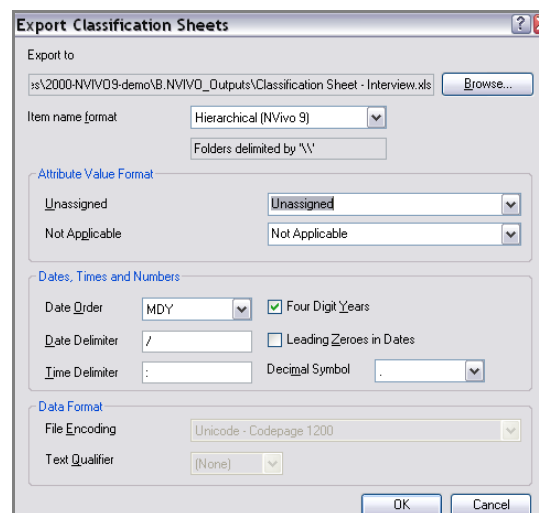


Figure 1.19 Export classification sheets options

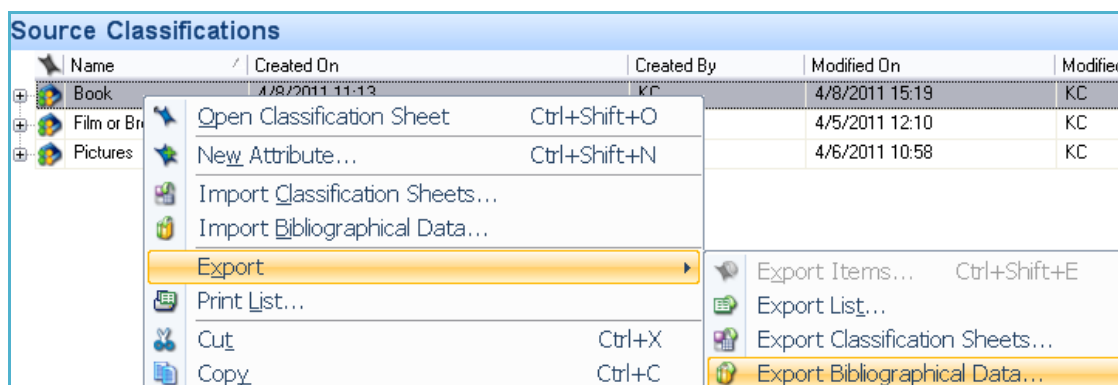



Figure 1.20 Exporting a source classification as a bibliography list

## 1.2.2 Exporting documentation

Documenting your work is an integral part of the research process which will help you shape the analysis of your work and the conclusions that you can draw. During the lifecycle of your NVivo 9 research project, you will have created a range of documentation material that you might wish to export to accompany your data and analysis or for your or other researchers' future reference.

If you followed the recommendations of this exercise, you should have stored your documentation in two places:

- in a folder in the **Externals**, where you should have included a link to the external documentation files you could not import
- in your **Memos**, where you should have stored your project journals, consent form templates, interview material and project administration related files.

 Export the following from your NVivo9 project file:

**3-6.**

- a) your journal memo entries as .rtf files
- a report of all the items in the project in .rtf format
- the actions logged as an .xls sheet and a .txt file
- a list of the documents and datasets in the Internals\Text folder as an .xls
- a list of all the sources (internal, external and memos) as a .txt

There is no need to export your **linked External files**, but you might wish to export any notes or annotations on them as well as any external web links you might have recorded. To export an **External object**, select it (select more than one by pressing CTRL while you are clicking), then right-click on it, and select **Export>Export Externals** or type **CTRL+SHIFT+E** (Figure 1.21). Make sure that you include all properties and related content, checking all boxes, and selecting .rtf (Rich Text Format) as the default export type (Figure 1.22). Select the folder you would like to save your externals in (Figure 1.23) and click on **OK**.

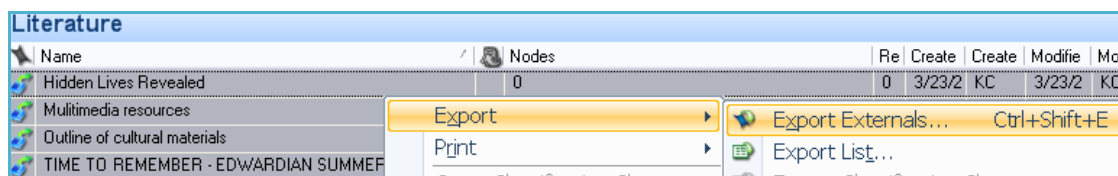


Figure 1.21 Exporting your externals

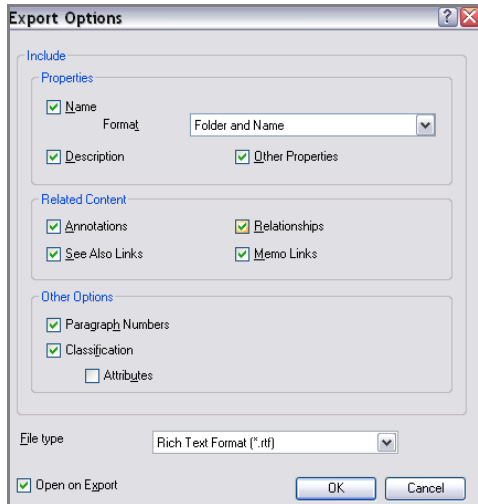


Figure 1.22 Externals Export Options

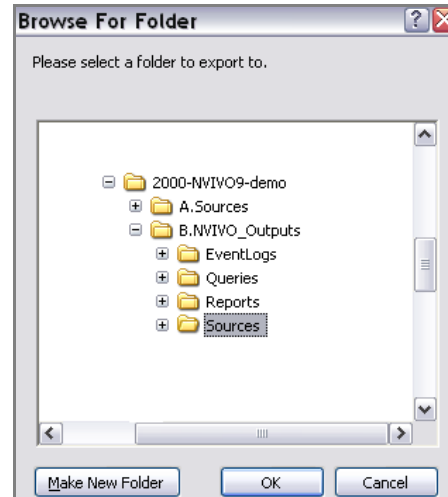


Figure 1.23 Exporting to the default folder


Exporting your **memos** is very similar to exporting your internal textual sources, discussed in section 1.1.

In addition to the documentation that you have created, NVivo 9 allows you to export the following additional information about:

- **the project:** Run a *Project Summary Extract Report* (Folders>Extracts>Project Summary Extract) , select all folders and save as .txt, .xml, or .xls file.
- **the actions logged:** Click on File>Info>Open Project Event Log, which will open the *Event Log*. Click on one of the log entries, then select **Export list**. You can export this list as an .xls, .xlsx, .rtf, .pdf, .doc, .docx or .txt file, but .txt format is recommended, as information about the type of event is recorded as text and not as an icon and it is in preservation friendly format.
- **the list of documents/datasets (not folders) in any particular folder:** Click somewhere on the list of documents of the folder, then select **External Data>Export> Export list**. You can export this list as a as an .xls, .xlsx, .rtf, .pdf, .doc, .docx or .txt file, but .xls, .rtf and .txt are recommended.
- **a set:** Run a *Project Summary Extract Report*, (Folders>Extracts>Project Summary Extract), select the **Sets** folder and save as .txt, .xml, or .xls file.
- **all sources:** Run a *Project Summary Extract Report* (Folders>Extracts>Project summary Extract), select the **Internals**, **Externals** and **Memos** folder and save as .txt, .xml, or .xls file. Another thing you can do is create a set with all your sources (right-click on folder then select **Add to set**), then export the file listing to an .xls, .xlsx, .rtf, .pdf, .doc, .docx or .txt file. Again .txt is recommended.

## 2 Managing Bibliographical Data

NVivo 9 allows you to export bibliographical data about sources you have classified either manually or by importing a bibliography to NVivo 9 using any predefined source classification (except if classified as an interview or focus group).



3-7.

Export your source classifications in your NVivo 9 project file as a bibliography list.

To export bibliographical data from a source classification, select it, then right-click on it and select **Export>Export Bibliographical data** (Figure 2.1). Save the file as an RIS .txt file (works well with most reference managers) and save it in the **Bibliography** folder of your **NVIVO\_outputs** folder (Figure 2.2).

Note that NVivo 9 **will not format your bibliographical data** in different bibliographical style formats (such as MLA, APA or Harvard) in order for you include them in the references list of a publication you are writing, for example. To do that, you need to export the bibliographical data as an RIS .txt file (works well with most reference managers) and import it to your favourite reference manager like Endnote or Zotero. Through the managers you should also be able to convert the RIS .txt file in other formats like BibTeX .bib or MODS .xml.

More information about how to **exchange data between NVivo 9 and reference management tools** is available from [http://help-nv9-en.qsrinternational.com/procedures/exchange\\_data\\_between\\_nvivo\\_and\\_reference\\_management\\_tools.htm](http://help-nv9-en.qsrinternational.com/procedures/exchange_data_between_nvivo_and_reference_management_tools.htm).

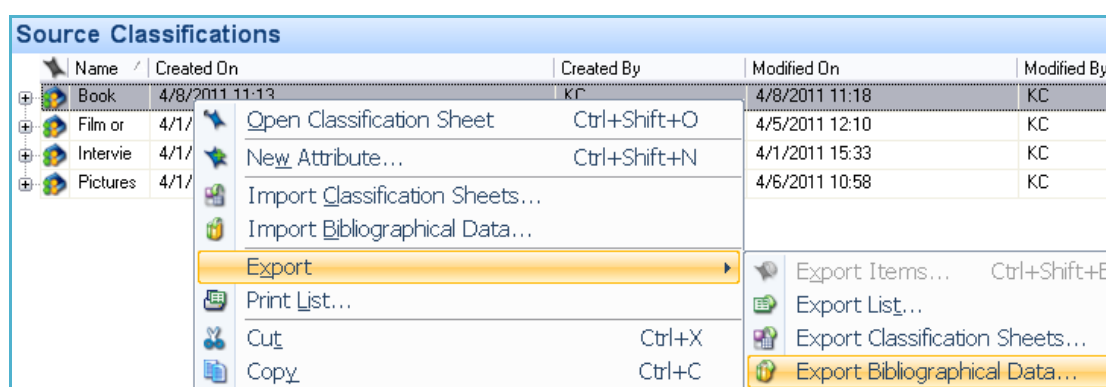


Figure 2.1 Exporting source classifications as Bibliographical data

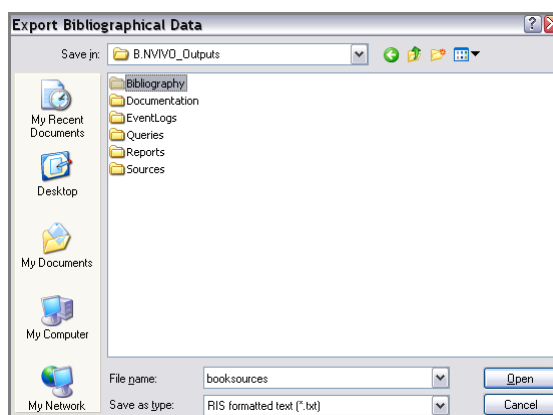


Figure 2.2 Exporting Bibliographical data as a RIS .txt file

In addition to exporting your bibliographical data, NVivo 9 allows you to do the following:

- **view a list of all sources and their attribute values that belong in a particular classification.** To view all sources that have been classified as books, right-click on the classification name or a source that is a **Book**, and select **Open Classification List**. This will open the classification list of the book classification that you can sort or edit.
- **run a query over sources with particular characteristics** e.g. run a text search query on the term “family” across the books published after 1995.
- **use charts to show the distribution of your sources by attribute value** e.g. create a chart of the distribution of your book sources by year.
- **include bibliographical data when you print or export these sources.** To do this, make sure you have selected the classifications and attributes boxes upon export (Figure 1.2, Figure 1.5, Figure 1.8, Figure 1.22)

For more **information on citing and referencing**, consult your institution’s citing and referencing guide or alternatively have a look at the *University of Essex Referencing Guide*: <http://www.essex.ac.uk/myskills/skills/referencing/default.asp>

## Summary

In this unit we discussed issues that need to be considered at the post analysis stage of your research, when you are ready to export your data and documentation from NVivo 9 for archiving or to make them available to other researchers for reuse. We presented some recommendations on the following issues:

- exporting data and documentation for archiving including advice on preservation-friendly formats and exporting contextual information about your data created within the NVivo 9 project file.
- managing your bibliographical data and resources created or imported in NVivo 9 and advice on exporting them for use with reference management software.

## Appendix

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