



Teaching NVivo

Lq wurgx fwlrq #0#8 #p lq ##
 Plug the Digital Scholarship Center

Q rwhv#iru#k h#Lqvwux fwr u#

-  Indicates features that are NOT available in the Mac version;
-  means it is partially implemented

Q rwhv#iru#Vwxghqw#

- This workshop will give you an overview of the basic features of NVivo that seem to be most widely used.
- I do not expect, nor think you will, remember everything I said. What I'd like you to focus on is *what is possible*. If you know it *can be done*, you can come ask me how to do it.

T x d l w d w l y h # V r i w z d u h # 0 # 8 # p l q ##

Z k d w # g r h v # v r i w z d u h # d o r z # | r x # w r # g r #

- Apply different codes to varying and overlapping segments
 - Retrieve all the text coded with the same label
 - Can focus on the theme to see additional patterns
 - Can identify child codes that further exemplify themes
- See the list of codes in one place
 - Can arrange them hierarchically
 - Can develop hypotheses about relationships
- Make changes as your understanding evolves
 - Rename, rearrange and combine codes
 - Remove codes

Z k | # x v h # V r i w z d u h B #

- Easier to keep track of data and thoughts, draw connections
- Easier to change your mind, make changes, show the evolution of thinking
- Software does not do stuff for you! “Automatic” is when you’ve done work elsewhere

Q Y lyr #0#8 #p lq

- **Click on NVivo icon** in dock
- **Put in your initials** if asked and click OK
- On the Right Side, **click on Sample Project**
 - Called “Environmental Change Down East”
 - Always included, used for all tutorials, etc.
 - Warn: Finished project, new project is almost empty

(while people are doing this)

T x d o w d w l y h # V r i w z d u h # R s w l r q v # # D f f h v v

- Each has different strengths: <https://infoguides.gmu.edu/qual/software/choose>
- NVivo, from QSR International: Easiest to pick up, includes Theory Building tools
 - In Data Services Labs, 14-day free trial
 - Students: 2 yr (Win \$99 Mac \$85) / Mac has fewer features

L q w h u i d f h #

- User “Login”: Initials attached to activities, *see lower left corner*
 - Allows for Collaboration, which requires identical sources
 - Change at: File | Options [User Profile]
- Standard Windows/Microsoft-like Program
 - Left Pane is Navigation
 - Tabs on the Top with sections, context sensitive
 - Or, Right click for options, context sensitive

#

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H { s r u l q j # I l h # W | s h v #

- *See Files* are the data you import
 - Organized in Folders according to type
 - **Click on folders** to reveal data files
 - Create folders through right click or on the Create Tab.
 - Go to Interviews, or a folder that matches your data
 - **Double Click to open a file**
- *See new Colored Tab*: "Tools" Document Tools, PDF Tools, etc.
 - Icons represent source type
 - *See Interviews* : Text, Audio, Video
 - *See Area and Township* : Images, Spreadsheet/Survey Data
 - *See Social Media & Subfolder*: Twitter Data, PDF

#

#

Fryhu#li#q h h g h g #

Lp s r u w l q j # G d w d #

- Tab Import
 - Most everything is "Files"
 - **Click Files**
 - In lower right, by Open, see "*Supported files*"
 - **Click Cancel** to show Dialog box
 - Cases: we will discuss, but the little i is a good explanation you can read later.
 - **Click Cancel** again
- Other Import Options
 - NCapture: Browser Plug-in. 2 step-process (thus, computer need not have NVivo)
 - Zotero and other reference managers, which you should be using.

#

H { dp lq lqj #F rg lqj #0#4 3 04 8 #p lq #

Uhwulhy lqj #F rghg #Wh { w#0#8 #p lq #

- Find the **Codes** Section and the main **Nodes** folder. You may need to click the Arrow.
- Nodes are Codes, but, as you'll see, Nodes are much more: any grouping
 - Traditional "Codes" usually go in the main folder. Look at the topics.
 - Codes can be **hierarchical**, **click the plus** next to the name
 - Use the **arrows** to see **subfolders**. e.g., Question topics in Autocoded Responses
 - Auto-coded just means to use the document structure to code
 - Plus version has word-frequency thematic coding and prior-coding-based
 - ~ Relationships can be set up between any two items, such as codes, in visualizations.
- Node Retrieval
 - **Find Community Change** in the List of Nodes
 - Note the number Files (18) and References (62)
 - If you can't see them, you might have to widen the area given to the list.
 - **Double-click on Community Change**, this is a Simple Query
 - Gives information (references coded, coverage)
 - All Queries have Grey tabs , see also Summary tab
- Find Files\\Interviews\\Barbara, how many references? What do they say
- **Click link to open Interview//Barbara** with references highlighted
- Notice the tabs where previously opened documents go, so you can switch back and forth.

F rg lqj #Vwulshv#0#8 04 3 #p lq ##

- See the "Document Tools" tab that is context sensitive.
- **Choose Coding Stripes** then option **All Coding**
- **Drag dividers** to minimize left size and maximize stripes.
- Scroll up and down through the document
- In the Stripes window scroll left and right to see all the stripes.
- Explore the stripe's names
 - **Pause** the mouse over a stripe - see details like folder location
 - Some are cases (persons), some are nodes and some are auto-coded nodes.
 - As we saw earlier, cases are People or Places
 - **Left click** - Highlight text coded to that node
 - **Right Click** on a Stripe
 - **Double Click** on a Stripe (then come back to Barbara)
 - Note: With Many things, you can do these four to get more information.
- Special Stripes
 - See the first B&W stripe , what does it mean? Coding Density
 - Some stripes themselves have lighter and darker parts
 - Let your mouse rest on the stripe in each part.
 - Initials for the different coders
 -

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Fuhdwlqj #Q rghv#0#6 #p lq##

- Navigaion Pane → **Codes** → **Nodes** folder
- Sometimes people know what codes they want to use, so you can create them first -> Family
 - **Right click** any blank spot (non-node) or the Folder
 - OR **Tab "Create"**, choose "Node"
- Node Properties Window
 - Name = Type "**Family**", Nickname is for quick coding when name is long
 - Description -> use this for Export Codebook or Memos
 - Hierarchical Name -> Click on node first to create child node
 - Aggregate, we'll talk about this later, makes more sense in action.
- **Click Ok,**
- Find what you did: 0 Files, 0 References

Edvlf#F rg lqj #0#8 #p lq#

- **Single Code**
 - **In Barbara**, find text related to Family. Select the entire thought.
 - **first 3 sentences** : "**My**" to "**Gloucester**".
 - Two Ways
 - Document Tab → Code
(you can click the big icon since there isn't anything else in the drop-down)
 - **Family** → **Okay**
 - Find Evidence you did something
 - Look in Stripes,
 - Look at Node Files and References
 - Double-Click on Node
- **Multiple Coding**
 - Open Margaret's Interview.
 - Again, look at the first answer. What to code for? ("We" to "are")
 - This time, Right Click → Code
 - Look at Dialog - I want to do **two** things this time:
 - More specific: Family → New Node | Rt click on Family. Type "Heritage"
 - I really like this quote. Also choose "Memorable Quotes"
 - Hold down Ctrl key to select JUST Heritage and Memorable Quotes
 - Look for Evidence that you did something.
- **Aggregate Coding**
 - Go to the Family node and see that it has 1 file, 1 reference
 - Right Click → "Aggregate Coding from Children"
 - Node Properties will get the window you saw earlier with this option.
 - What happened? Double Click on Family.
 - You can go and uncheck it to see that go away.

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Fdvhv#0#8 #p lq#

- If you are working with people, places or things that are **grouped in different categories**,
 - like people who have shared demographic characteristics that differ.
- AND you want to **compare or examine the role of those characteristics**
- Mostly helpful if **files and people are not the same thing** (like Focus Groups) or multiple files
- **Case - A Node** that can have **descriptive information**, like Demographics, called "**Attributes**".
 - Barbara is a Case, works exactly like a Node
 - Find her in **Cases**, and retrieve to see everything she said.
 - NVivo actually used the document structure to "**auto-code**" for speaker.
- Case Classifications hold characteristics of Barbara and others.
 - **Double Click on Person**
 - **Find Barbara's Case:** Click Arrow next to Cases (maybe twice), click on People, then click the + next to Interview Participants and double-click on Barbara.
 - We already knew about her interview, we can see this is just what she said.
 - **Scroll all the way down...**Looks like she was also a survey participant.
- See the Grey Tabs on the right side "Dataset" to see those answers in the original format.

Cases | People | Interview Participants | Barbara - Like a Node, Rt. Click to see Sheet

Case Classifications | Person | Barbara - List view of attributes

Case Classifications | Persons - Double click to view classification sheet

- Attributes.
 - In Navigation, **Click on Case Classifications**, then **double-click on Person**
 - These are attributes that are associated with each case.
 - "Show me what was Coded for Community Change in Barbara, Betty, Dorothy, etc" **vs** "Show me what was Coded for Community Change by a Person **classified as** a Female"
 - **All Qualitative software** has can assign attributes/variables to documents.
 - **Only NVivo** allows you to associate grouping data to random coded text--flexibility

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- **Go back to Barbara's Case.**
 - **Find Reference 5**, "At that time..."
 - **Drag-and-Drop it on to Family**
 - Note that we Coding with Retrieved Text

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What is Analysis in NVivo?

P d q d j l q j # F r g h v # 0 # 8 # p l q #

- Coding Process : Create Codes 1st then apply, or create on the fly
 - Big to Small: Code for main themes, then code from results to create sub-nodes
 - Small to Big: Code for details, then merge and re-organize nodes as a hierarchy
- The process of analysis is to refine and organize your codes...you do that.
- Remember...you can rename, delete, change, merge, split, etc.
 - You can make nodes children of another by dragging and dropping
 - You can merge by cut and paste.

Q r w h v # d q g # P h p r v # 0 # 5 # p l q #

- Good idea to create notes/memos to document your thinking. It makes them easy to create.
- "Create" tab, Memo.

H { s r u w l q j # 0 # 6 # p l q #

- Anything you see can be exported.
- Go to the Share Tab and click Export.

T xhulhv#0#4 8 #p lq#

Z kdw#lv#d#T xhu| ##0#8 #p lq#

- Double-clicking a node is a query ex. "Retrieve any text that was coded to this node".
- Queries allow us to be more specific, such as:
"Retrieve any text --from any of the interviews -- that was coded to both of these nodes."
- You can make use of Case Attributes, the grouping information.
- Examples of Queries you might use here would be:
 - For code overlap: "All places where the Economy was talked about in a positive way"
 - For cases: "All places where cases classified as Female talked about Community"

Wh { w#Vhdufk #T xhu| #0#8 #p lq#

- Go to the Interviews folder.
- Click on any interview and press **Ctrl-A**, it is a keyboard shortcut that means to select all.
- On the **Home Tab**, click on **Query**, then "**Text Search Query in these Items**"
- Put "**heritage**" in the box, and move the slider to "**With stemmed words**"
- Click "**Selected Folders**", click the + next to Files and put a check in the box next to Interviews. This means we will only search within the files in interviews.
- Click "**Run Query**"
- Grey tabs: What files that word was found in, List of the references,
 - Word Tree - ex. see how people are talking about heritage, using "our" vs "your".
 - As in Stripes, single click, right click, pause mouse, and double-click.

K Ihdufk lfd#F kdw#0#8 #p lq#

- The **Home Tab** also has Query and Visualize - greyed if you have not selected anything.
- In **Barbara's Case** bar chart icon, and choose "**Hierarchy Chart of NODES coded at this Case**"

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Edvh#Γ xhuLhv#

- See the Query Wizard.
- Queries that don't require coding are:
 - Word Frequency - will produce word clouds
 - Text Search

Vdyhg#Γ xhuLhv#

- Can also save the Query instruction. Store in Nav Search | Folder Queries
- Icons matches those on the Explore Tab.
- But, NVivo allows you to do better comparisons by examining several of these overlaps at once.
 - In Search > Queries > Attitude: **Attitude of individual Twitter Users**
 - In the rows they have individual cases. These could be individual files, or specific codes. In the columns they have the three codes Positive, Mixed and Negative.
 - If you Look at Matrix Tools, you have a lot of options. Notice that the content is currently coding references, but you can change it. You can also add a bit of shading to help because it is a big table.
 - Guess what would happen if you double-click in one of the cells.

Vdy lqj #| rxu#r z q#Γ xhu| ##3 08p lq#

- Go to the Interviews Folder
- Press Ctrl-A to select all
- On the Home Tab, click Query, then Word Frequency Query on these Items
- See how Selected Items... is blue.
- Change to Display 100 most frequent and stemmed words, then hit Run Query again
- Explore tabs on the right side.
- Click Add to Project... Name it "Interviews Word Frequency"

What	Applies to	Group & Filter	Aggregate	Other Advantages
Folders	Both	One	--	Shows when Retrieving
Sets & Collections	Both	Many	--	
Parent Nodes	Nodes	One	One Group	Easy to Retrieve
Source Attributes	Sources	Many	Many	
Case Attributes	Nodes	Many	Many	Allows [Compound] Coding Query & Framework Matrix


Appendix. More Features

Highlighting / Links - Tab Document | Section View | Checkboxes
view also at Collections | Annotations

Yellow: Coding to a node






Blue: Annotation

Pink: See Also link 

 : Memo Link (1 file → 1 memo)

Explore Tab

Queries - Tab Explore

- **Text Search**  – Retrieve source and context of word (Mac - no stemmed words)
- **Word Frequency**  – List of Frequent Words
- **Coding Query**  – Node/Case or Case attribute
- **Matrix Coding** – Items, Users, or Attributes
- **Crosstab** –
- **Coding Comparison** --
- **Compound**  – Can find content near others, not just overlapping
- **Group** 

Visualizations - Tab **Explore**

Charts: Bar charts

Mind Map: Simple Flow Chart. Design your node structure, then create as nodes

Project Map : See everything related to any item, source node, etc.

Concept Map : Can draw any set of relationships, figures. Add items one at a time

Cluster Analysis: See how “close” items are in words, coding, or attribute values

Comparison Diagram: See overlap in nodes between two documents, or overlap in sources between two nodes

Explore Diagram: Easy way to create a Project Map for an item

Exporting Lists and Items - Tab **Share** | Section **Export**

Export: Looks like Detail View (bottom), one document for each item selected

Export List: Looks like List View (top), in Excel

Export Codebook: Nicer view of nodes in a Word Document with description

Name	Node
Barbara	41
Betty and Paul	15