



北京师范大学
香港浸会大学 联合国际学院

BEIJING NORMAL UNIVERSITY · HONG KONG BAPTIST UNIVERSITY
UNITED INTERNATIONAL COLLEGE



Getting Started with Qualitative Data Analysis using NVivo

Andy Jiahao LIU

liu.jiahao@connect.um.edu.mo

10th May 2023



This workshop is prepared for and delivered to **UIC Year-3 undergraduates** enrolled in the *Research Skills in Language Studies and TESOL* course, under the invitation of Dr. Edith Mei-Yee YAN (Associate Professor of English Language and Literature Studies).

博文雅志 真知笃行

In knowledge and in deeds, unto the whole person



By the end of this workshop, you will:

- develop a clear understanding of using NVivo for qualitative data analysis
- understand basic functions (e.g., import, code, memo) of NVivo in qualitative data analysis
- gain hands-on experience in using NVivo for qualitative data analysis



A **computer-assisted** qualitative data analysis (CAQDA) software

“allows researchers to import, organize, explore, connect and collaborate on their data to reveal more significant insights from their qualitative data **faster**” (Lumivero, 2023)

Translating from analytical tasks into software tasks (Woolf & Silver, 2017)

Organize, Annotate, Visualize, Collaborate

Competing CAQDA Tools

- MAXQDA
- Dedoose
- Taguette
- QCoder
- QualCoder

- **CAUTION:** NVivo and similar CAQDA tools “make NO analytical contributions to your research” (Woolf & Silver, 2017, p.2).

Lumivero. (2023). *FAQs: Need to know more about NVivo*. <https://lumivero.com/products/nvivo/>
Woolf, N. H., & Silver, C. (2017). *Qualitative analysis using NVivo: The five-level QDA method*. Routledge.



- UIC ELLS Writing Lab (T5-303B) has NVivo on its computers.
- UK- and US-based higher education institutions usually will provide institutional subscriptions to NVivo.
- 14-day Free Trial open to anyone

The screenshot shows the NVivo website interface. At the top left is the NVivo logo with the tagline 'a product by QSR International'. At the top right are links for 'Support', 'Sign in', and 'EN'. The main content area features a large blue banner with the text 'Start Your 14-Day Free Trial' and a sub-headline: 'Work more efficiently, conduct deeper analysis from more sources, and defend your findings with NVivo.' Below this, it lists three benefits: 'Use advanced query and visualization tools', 'Identify themes and draw clear conclusions', and 'Achieve more robust research results'. To the right of the banner is a white sign-up form titled 'Create your QSR International account'. The form includes input fields for 'First Name', 'Last Name', and 'Email Address', a 'Send Verification Code' button, 'Password' and 'Confirm Password' fields with eye icons, and a checkbox for 'I accept the Terms of Use and Privacy Policy.' A 'Create Account' button is located at the bottom right of the form.

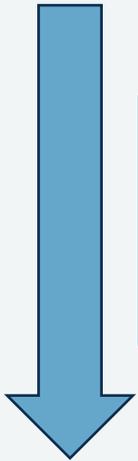
(Screenshot from NVivo website)



How does NVivo support your research project?

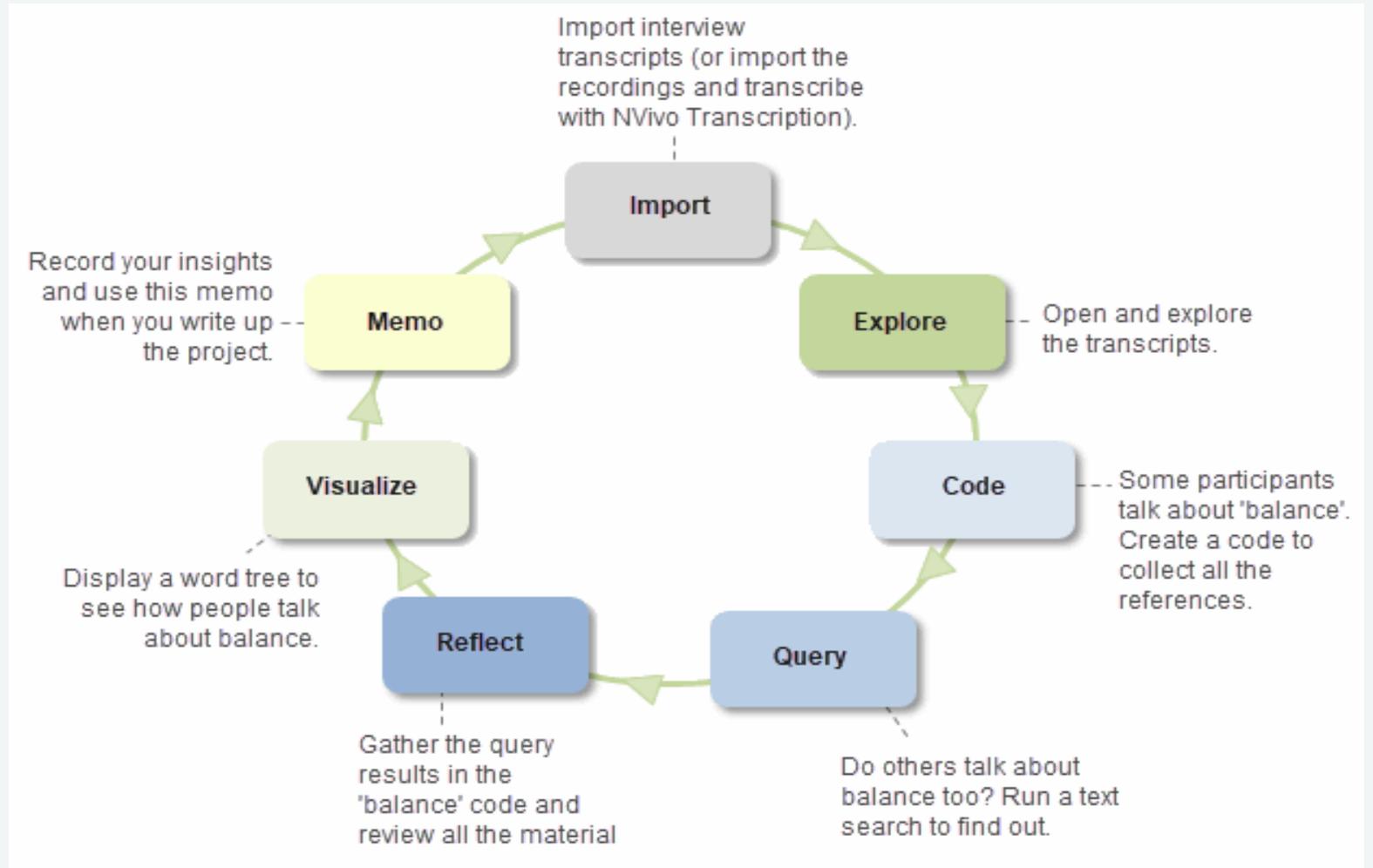


Literature review



NVivo can provide strong support to each stage of your research project.

Writing up the project



Source: <https://lumivero.com/products/nvivo/nvivo-product-tour/>

博文雅志 真知笃行

In knowledge and in deeds, unto the whole person



What type of files can be imported into NVivo?



Audio

(.mp3; .m4a;
.wma; .wav)

Documents

(.docx; .doc;
.rtf; .txt)

Pictures

(.bmp; .gif; .jpg; .jpeg
; .png; .tif; .tiff)

Datasets

(.xlsx; .xls; .txt; online survey
results; social media data
(with NCapture))

PDFs

(.pdf; reference
management
systems; .msg; etc.)

Video

(.mpg; .mp4; .avi; .wmv;
.3gp; .mov; .qt; etc.)

- Thematic Analysis
- Text Analysis
- Discourse Analysis
- Grounded Theory
- *Etc.*

博文雅志 真知笃行

In knowledge and in deeds, unto the whole person



- Get the file you'd like to analyze with NVivo ready
- Get a sense of **the coding strategy/scheme** that you plan to use
 - Revisiting your theoretical frameworks, research questions, and literature review
 - Inductive/open coding



- The software package used in this workshop: **NVivo 12 (Windows)**
- Latest Version: **NVivo 14**

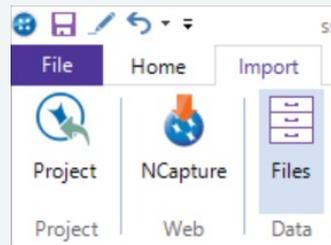


Task 1: Create Project & Import Data



- ✓ **Step 1:** Find the Demo Interview Transcription File – Barbara
- ✓ **Step 2:** Open NVivo
- ✓ **Step 3:** Click “Blank Project” > Add “Title” & “Description” information
 - ✓ The title can be the research project name or familiar abbreviations
 - ✓ Descriptions can help you document time, researcher(s) involved, and other information you like.

- ✓ **Step 4:** Import the Demo File



博文雅志 真知笃行

In knowledge and in deeds, unto the whole person



NVivo Interface: Four Function Areas



The screenshot displays the NVivo software interface. At the top, the 'Main Menu & Associated Ribbons' are visible, including File, Home, Import, Create, Explore, and Share. Below the ribbons, the 'Navigation View' is on the left, showing a tree structure with categories like Quick Access, Data, Codes, Cases, Notes, Search, Maps, and Output. The 'List View' is in the center, showing a table with columns for Name, Codes, and References. The 'Detail View' is on the right, displaying a document titled 'Let's get started with NVivo for Windows' with a welcome message and a quote from Henry.

Main Menu & Associated Ribbons

List View

Detail View

Navigation View

博文雅志 真知笃行

In knowledge and in deeds, unto the whole person



- The Memo, similar to reflective journals/diaries, is **an independent source of writing** within NVivo, where the researcher can write down information related to data collection, data analysis, or other points of interest. Memos can help researchers:
 - Get a fresh sense of the collected data after weeks or months
 - Track the research progress
 - Validate the coding process
- **Step-by-step Procedures in NVivo:**
 - 1) Right Click “Memos” under the Note section in the Navigation view > Select “New Memo” > Add “Name” & “Description” information accordingly > Click “Ok”
 - 2) Select “Create” in the Main Menu > Click “Memo” > Add “Name” & “Description” information accordingly > Click “Ok”



The screenshot shows the NVivo 12 Plus interface. The top ribbon includes tabs for File, Home, Import, Create, Explore, Share, Memo Tools, Memo, and Edit. The Memo Tools tab is active, showing options like Set, Search Folder, Folder, and NVivo Transcription. The left sidebar shows a tree view with categories: Quick Access (Files, Memos, Nodes), Codes (Nodes, Sentiment, Relationships, Relationship Types), Cases (Cases, Case Classifications), and Notes (Memos, Framework Matrices, Annotations, See Also Links). The main workspace displays a memo titled 'Barbara' with the following text:

Welcome to the Down East project team protocol memo! This memo is designed to set out some consistent procedures and practices for our research team.

Our goal is to learn about community views of land use and environmental change in Down East, North Carolina, an area comprised of 13 distinct residential communities. The results of this work will document these community perceptions, and results will be made available to local stakeholders to facilitate public dialogue about the area's future and to help communities, developers, and planners envision long-term strategies for sustainable land use and development.

We are using pseudonyms for individuals. Wanda is keeping the master list that matches respondents to pseudonyms. Please let her know if you need a pseudonym for someone. The process for allocating pseudonyms is contained in her research journal.

This Memo documents the research background, objective, significance, and analysis scheme of the project. Also, collaborators are informed of the housekeeping issues.

博文雅志 真知笃行

In knowledge and in deeds, unto the whole person



- The Annotation is a kind of **commentary function** embedded in NVivo. You can document any **emerging ideas** when you familiarize yourself with the data or note down similar patterns from other transcriptions.
- **Step-by-step Procedures in NVivo:**
 - Go to the Detail View area of the Demo File “Barbara” > Select any strings or sentences that are of interest to you > Right-click your mouse > Scroll down to “New Annotation” > A popup window will appear under the detail view > Type your thoughts and comments
 - Check all your annotations under the “Notes” section in the Navigation View area



The screenshot shows the NVivo 12 Plus interface. The top ribbon includes tabs for File, Home, Import, Create, Explore, Share, and Document Tools. The Document Tools ribbon contains various icons for data sources like Excel, Text File, SurveyMonkey, Qualtrics, SPSS, Classification Sheet, EndNote, Mendeley, RefWorks, Zotero, Memos, Evernote, OneNote, Outlook, Report, Extract, and Codebook. On the left, there is a Quick Access sidebar with categories like Files, Memos, Nodes, Codes, Cases, and Notes. The main window displays a document titled 'Barbara' with the following text:

Interview with Barbara on February 19th, 2009 at her home in Bettie, North Carolina. Barbara writes cooking curriculum materials and does earth science environmental consulting work for soil scientists.

Q.1. Connection to Down East

Henry
Tell me about your personal and family history in Down East. How long have you or your family been living Down East full time or part time?

Barbara
My family moved here when I was two years old in 1969. My parents still live here. They live down in Gloucester. But I was raised in Beaufort, in town, and went to Beaufort Elementary and middle school and high school, then moved away for college. So I've lived here most of my life.

Annotations

Item	Content
1	Sample annotation: Background information of Barbara. Will her disciplinary background influence her perception?



You now have around **7 minutes** to read the transcription of Barbara. During this process, you should write down:

- One Memo
- Two Annotations

Raise your hand if you encounter any issues.



- Coding MATTERS in qualitative data analysis; it is a process of refining, organizing, and categorizing the segments or chunks of data within your data by topic, theme, or case.
- In NVivo, we use **Nodes** to “represent what is identified in the data as meaningful in relation to the project objectives” (Woolf & Silver, 2017, p. 84)

“Code = Node”

Woolf, N. H., & Silver, C. (2017). *Qualitative analysis using NVivo: The five-level QDA method*. Routledge.



Approach 1: Drag and Drop

Select the text that is meaningful to your research objectives

Hold the left mouse on the selected text

Move the mouse cursor to the Node area

A popup window "New Node" appears; type the relevant information as needed



Approach 2: Home Tab

Select the chunk of text that is meaningful to your research objectives

Click the "Code" label under the Home Tab

Left-click the mouse and select the "code"

Click "New Code"; Name this specific category; Click "Ok" when it is done



Approach 3: Right Click

Select the chunk of text that is meaningful to your research objectives

Right-click the mouse

Choose "Code" & repeat the remaining procedures in Approach 2

Approach 4: Hot Keys

Select the chunk of text that is meaningful to your research objectives

Press "Ctrl + F2" on your keyboard

Repeat the remaining procedures in Approach 2

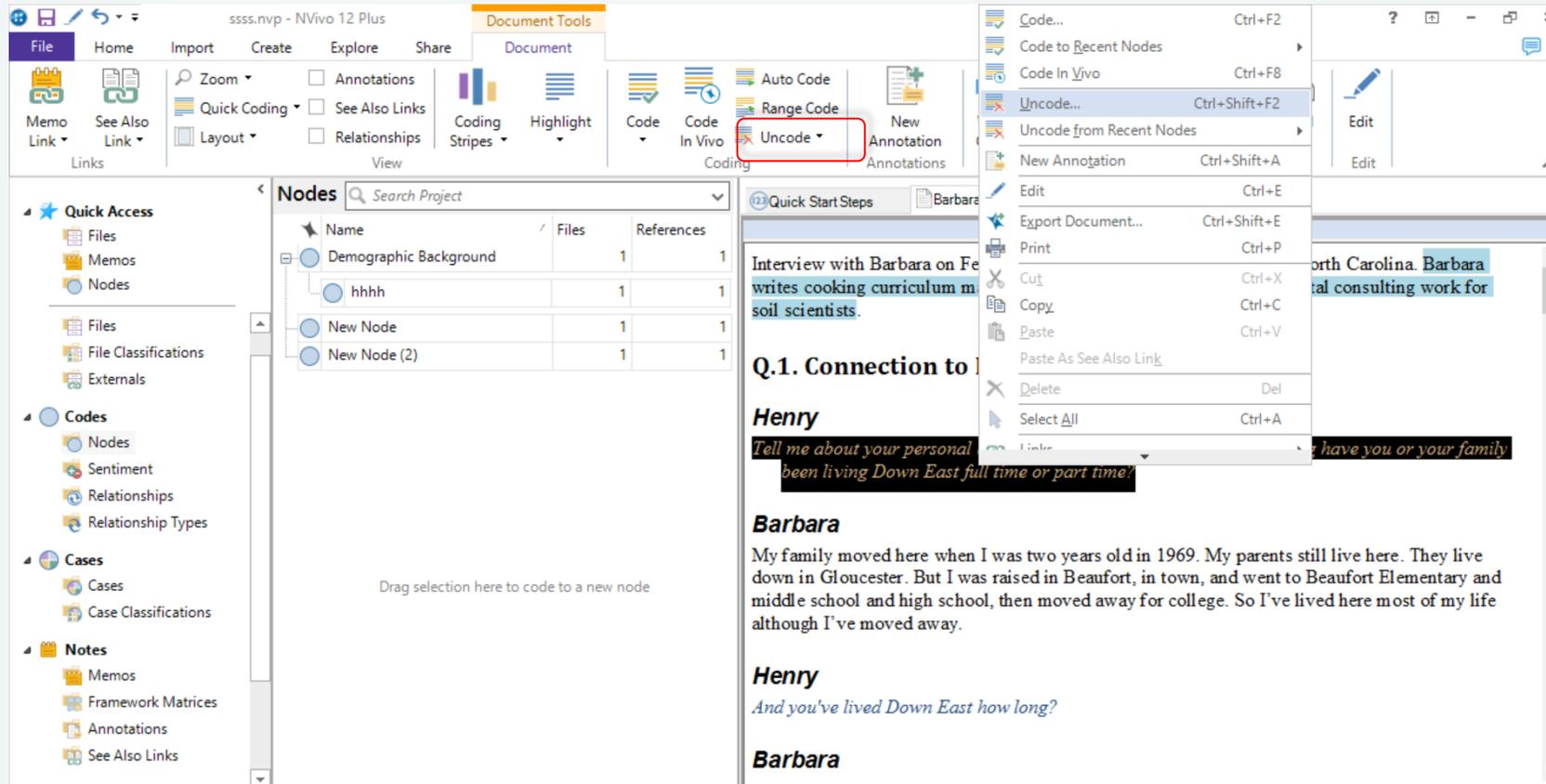


What if there is a mistake during the coding process?



Uncoding with NVivo: *Right Click* or *Document Tab*

- Select the concerned text > Right-click the mouse > Click “Uncode”
- Select the concerned text > Click “Uncode” in the Document Tab under the main menu



博文雅志 真知笃行

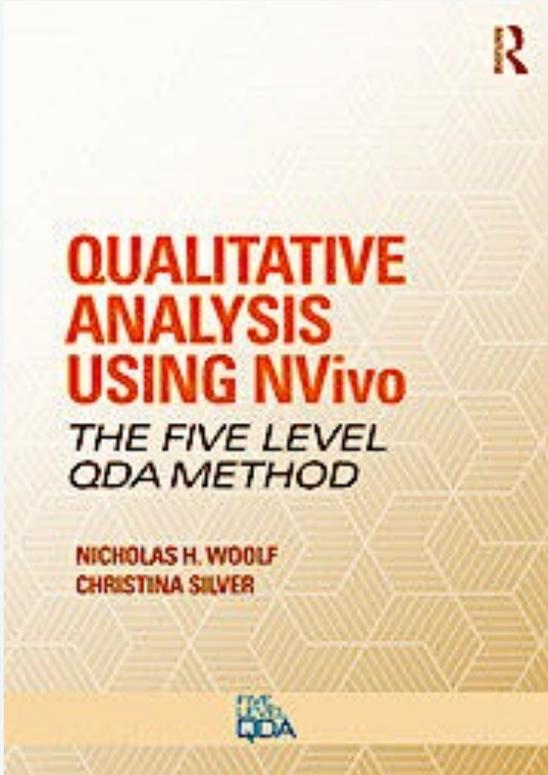
In knowledge and in deeds, unto the whole person



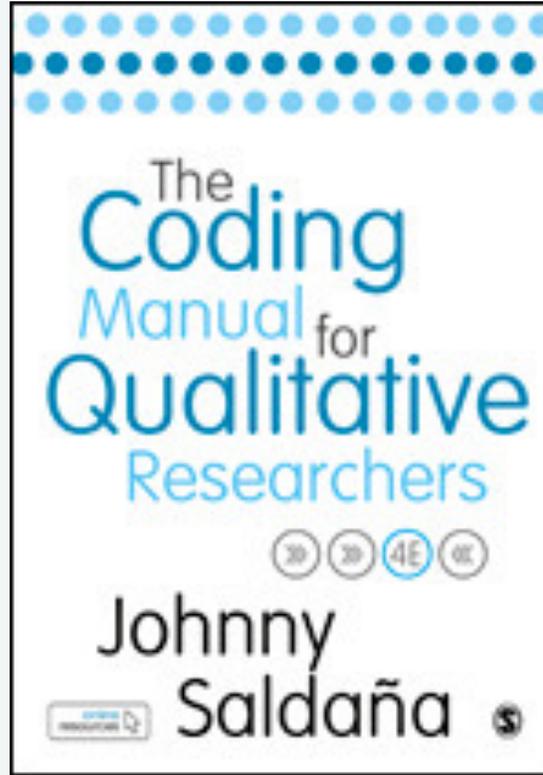
You now have around **8 minutes** to read the transcription of Barbara. During this process, you should:

- code in a manner that is meaningful to your interpretation of the data
- try different approaches during the coding process
- code as many as possible to help you understand the process

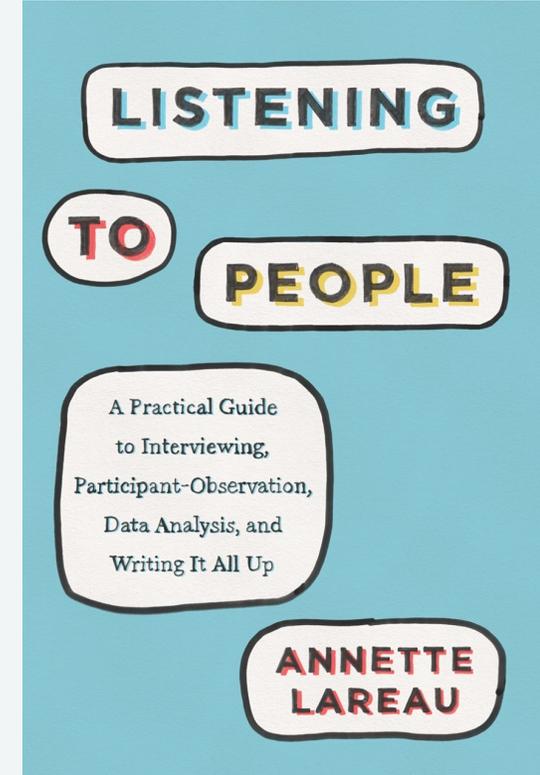
Raise your hand if you encounter any issues.



<https://www.routledge.com/Qualitative-Analysis-Using-NVivo-The-Five-Level-QDA-Method/Woolf-Silver/p/book/9781138743670>



<https://uk.sagepub.com/en-gb/eur/the-coding-manual-for-qualitative-researchers/book273583>



<https://press.uchicago.edu/ucp/books/book/chicago/L/bo114845989.html>



Thank you for your participation 😊

Want to learn more about NVivo?

- Further readings
- Free tutorials on *YouTube* and *Bilibili*