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).

Workshop Objectives

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

What is NVivo?

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

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

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

Organize, Annotate, Visualize, Collaborate

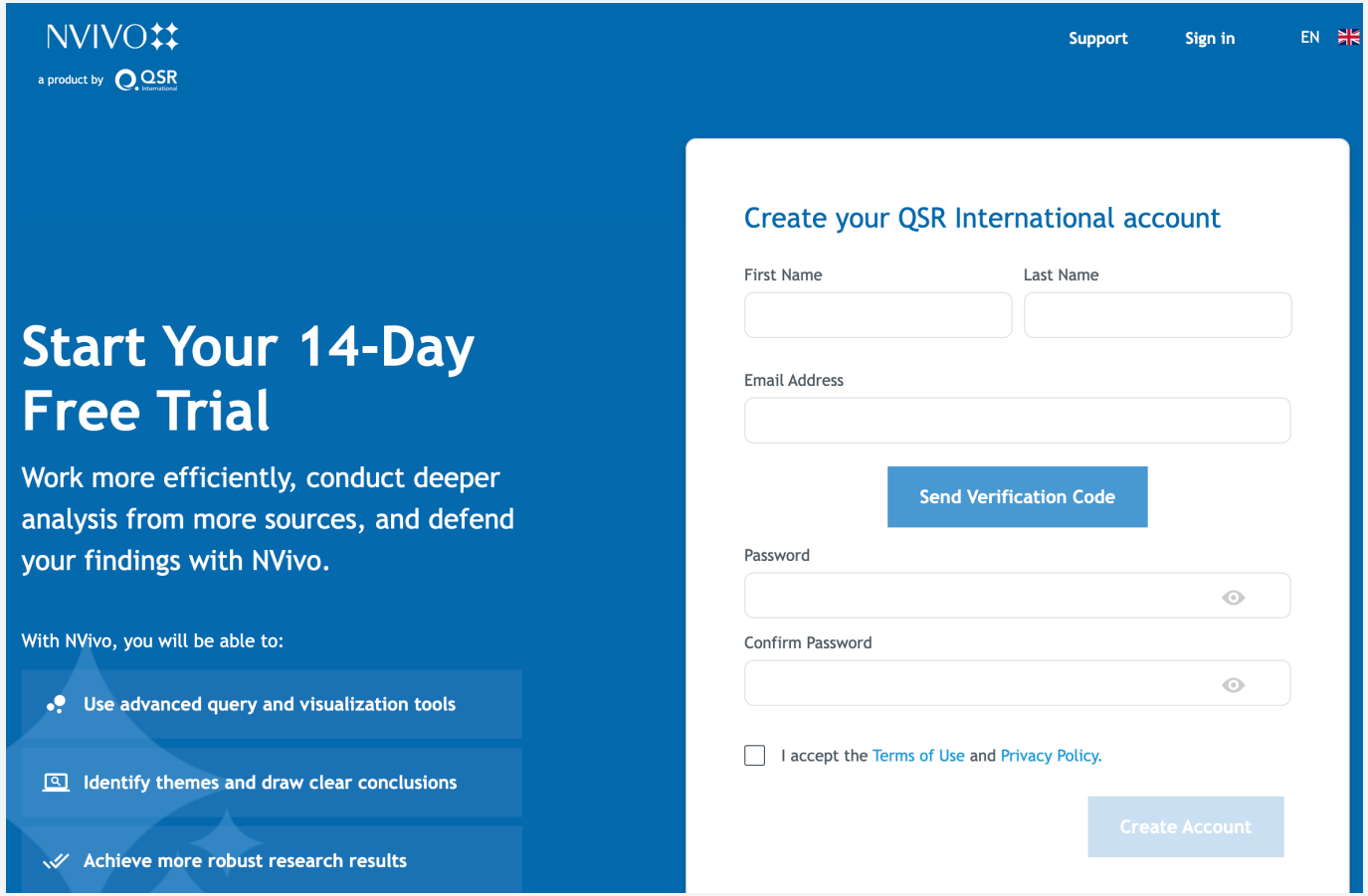
Competing CAQDA Tools
- MAXQDA
- Dedoose
- Taguette
- QCoder
- QualCoder

- **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.

How to Access NVivo?

- 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



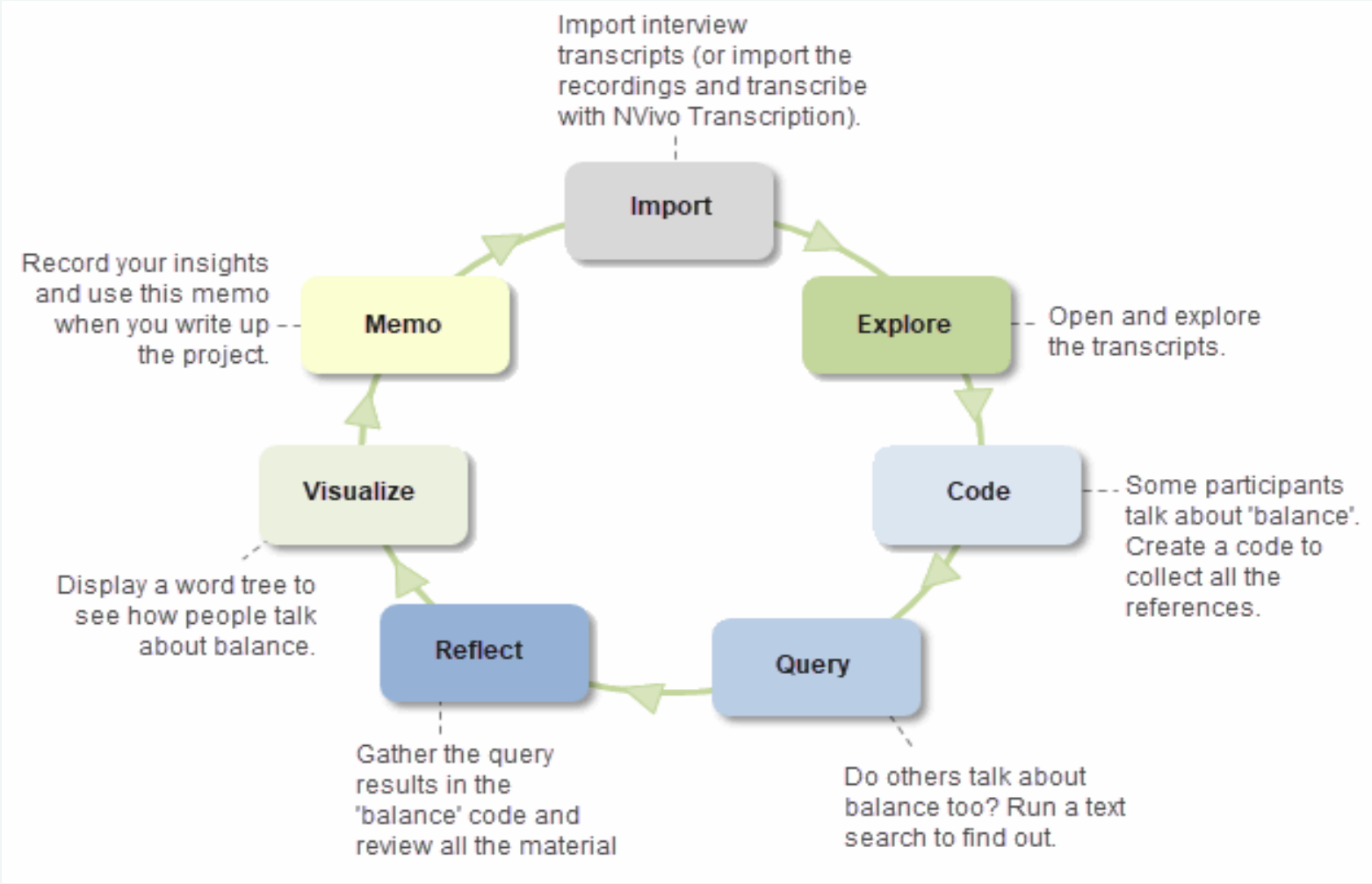
(Screenshot from NVivo website)

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/

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.*

Preparations Before-using NVivo

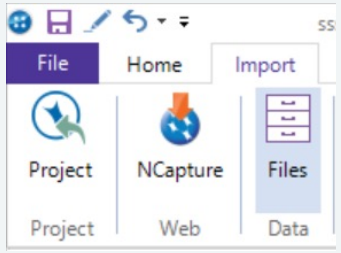
- Get the file you'd like to analyze with NVivo ready
- Get a sense of **the coding strategy/scheme** that you plan to use
  - Revisiting your theoretical frameworks, research questions, and literature review
  - Inductive/open coding

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

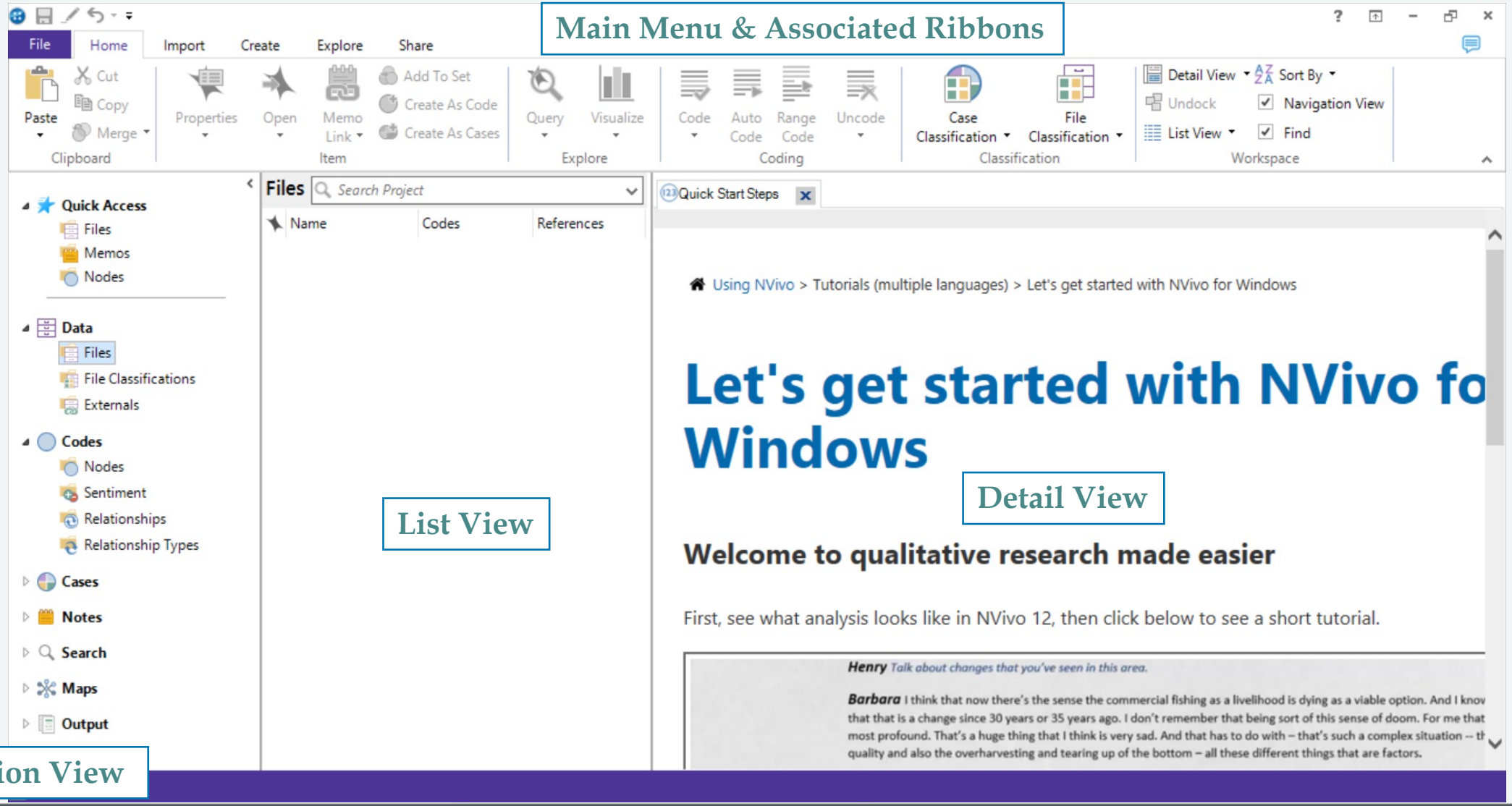
- Latest Version: **NVivo 14**

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



NVivo Interface: Four Function Areas

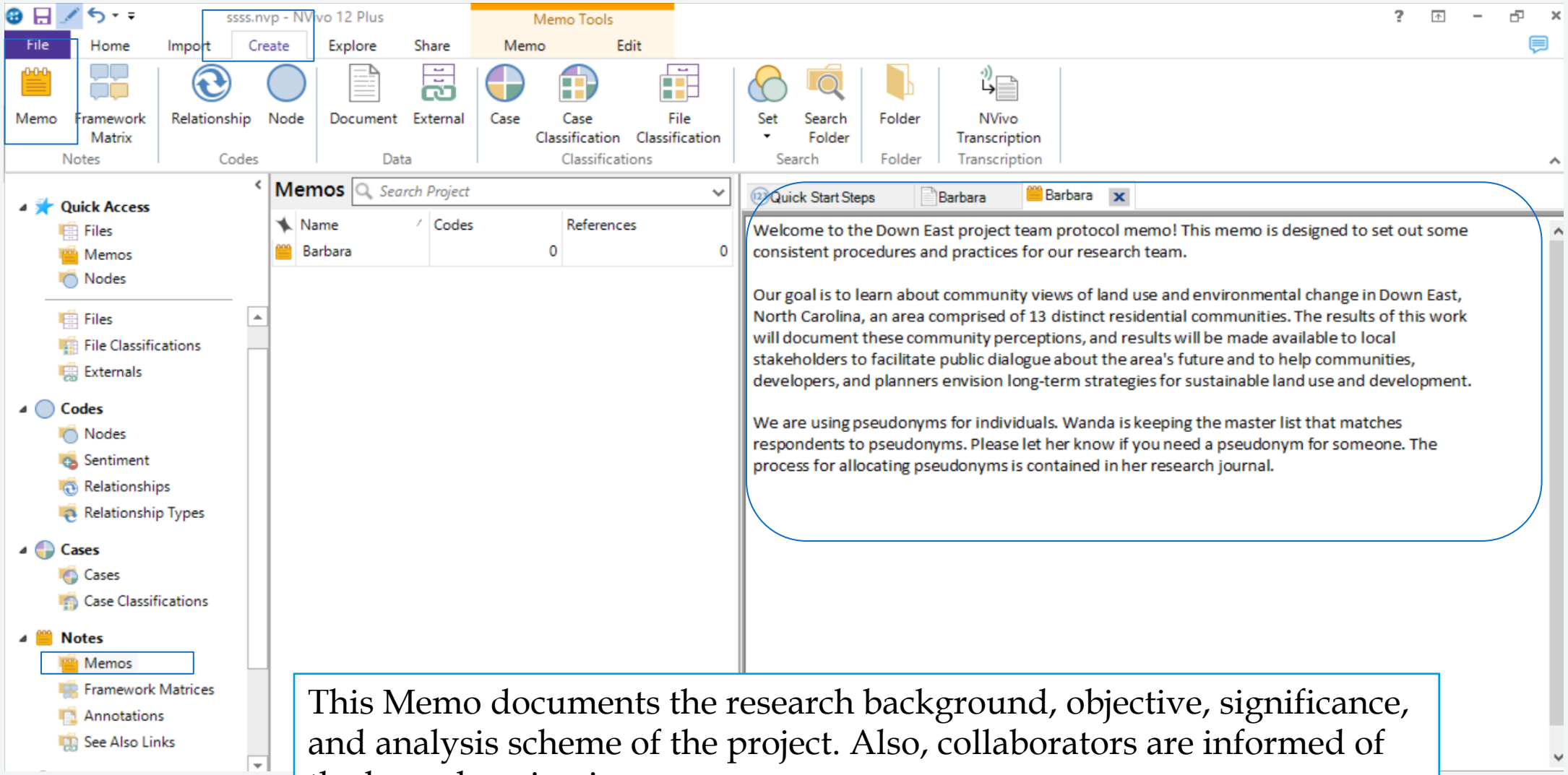


Task 2: Creating Memo & Annotations in NVivo

- 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"

NVivo DEMO for Memo



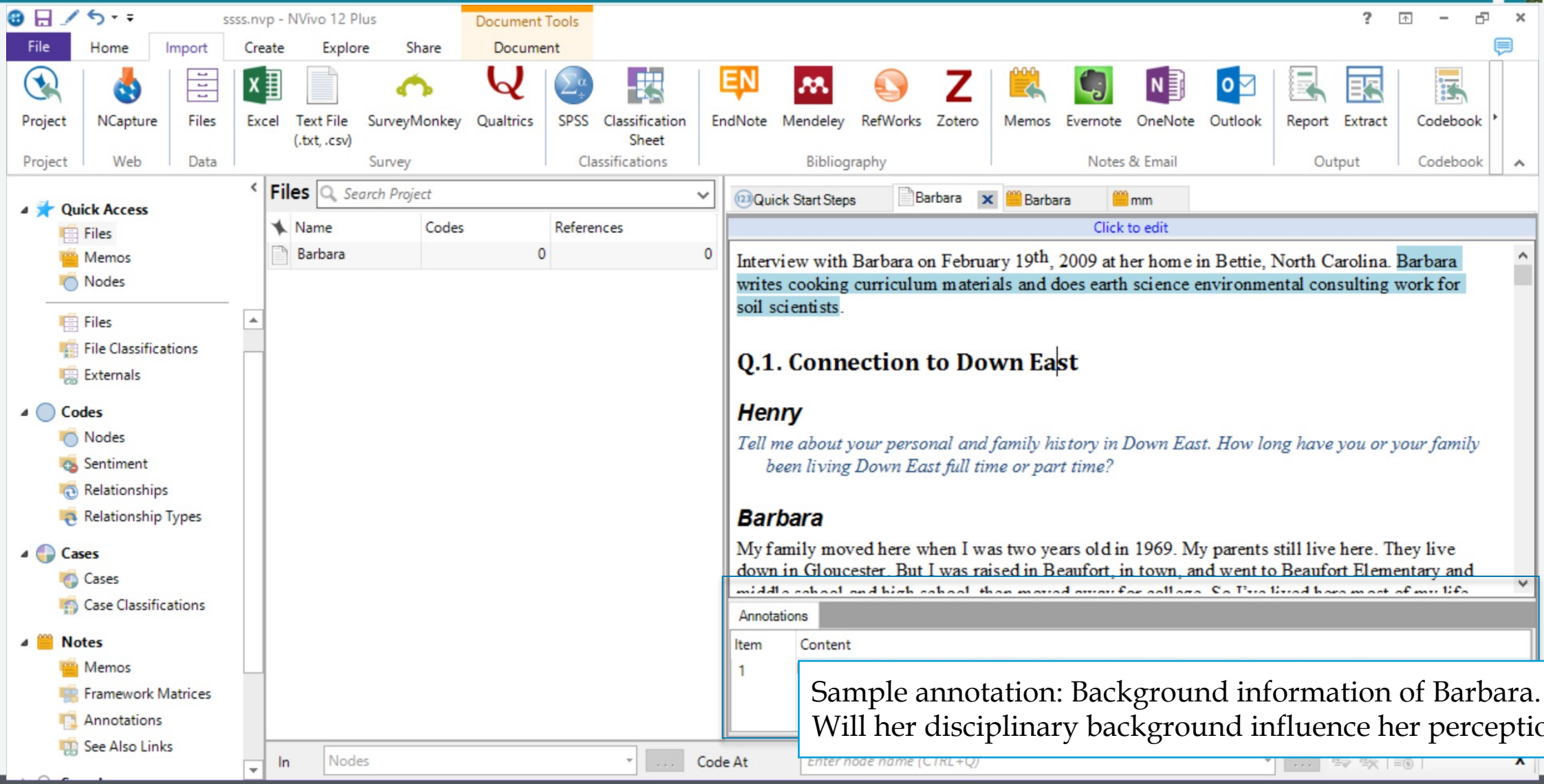
This Memo documents the research background, objective, significance, and analysis scheme of the project. Also, collaborators are informed of the housekeeping issues.

Task 2: Creating Memo & Annotations in NVivo (Cont.)

- 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

NVivo Demo for Annotation



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

Practice Time

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.

Task 3: Coding with NVivo

- 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.

Task 3: Coding with NVivo (Cont.)

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

Task 3: Coding with NVivo (Cont.)

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

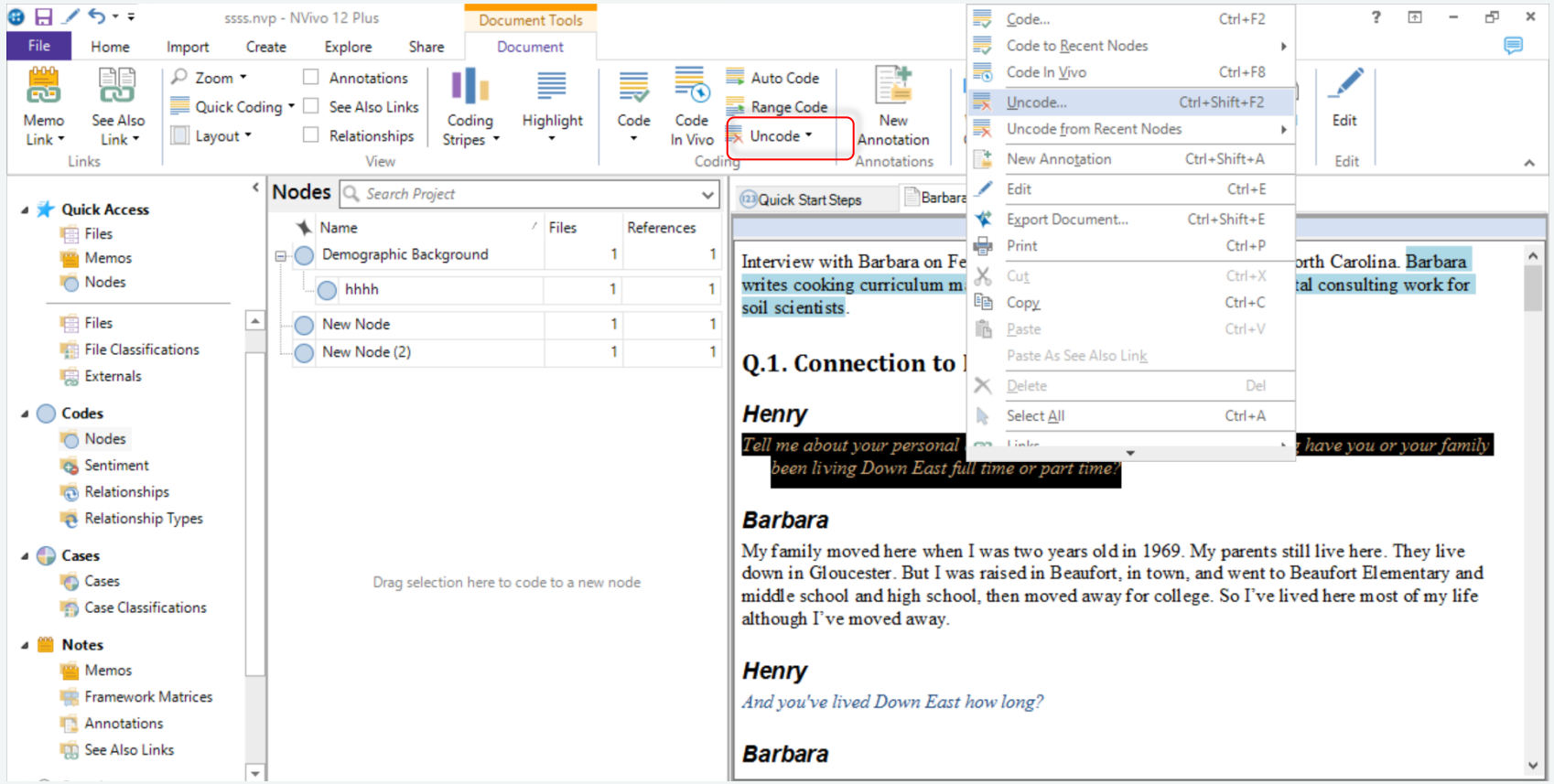
Approach 4: Hot Keys

- 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



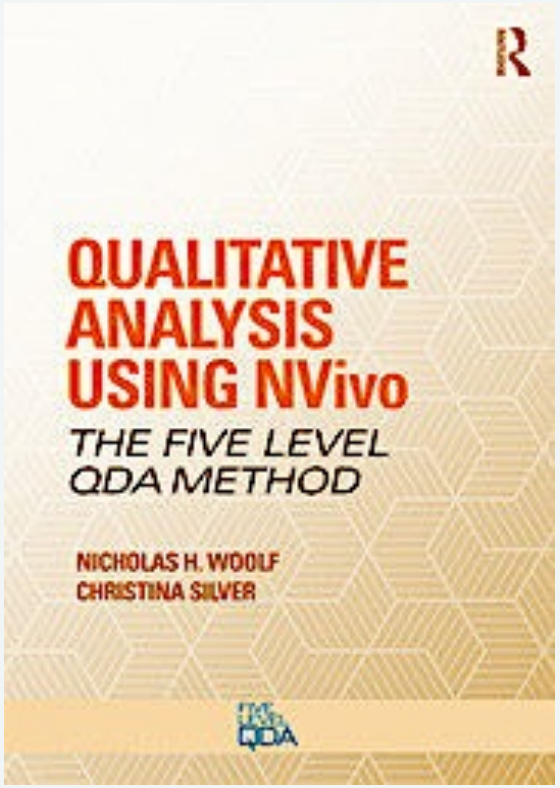
Free-coding Practice

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

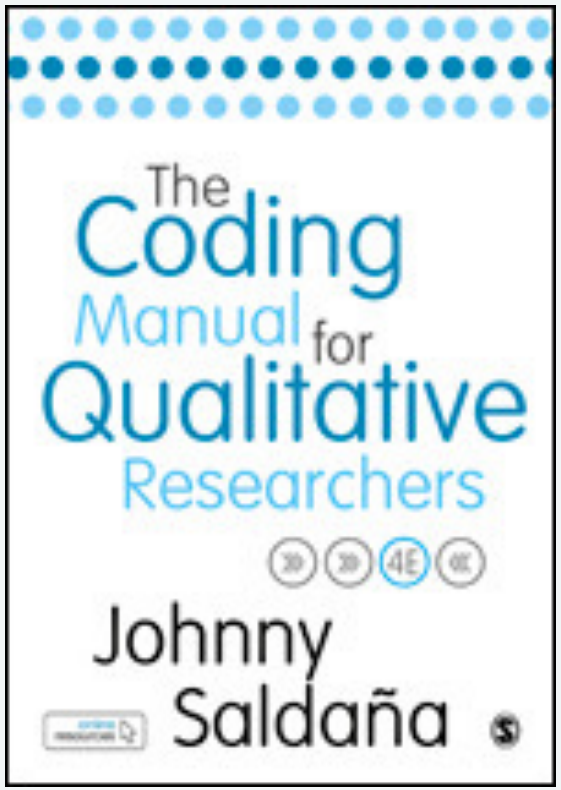
- code in a manner that is meaningful to your interpretation of the data
- try different approaches during the coding process
- code as many as possible to help you understand the process

Raise your hand if you encounter any issues.

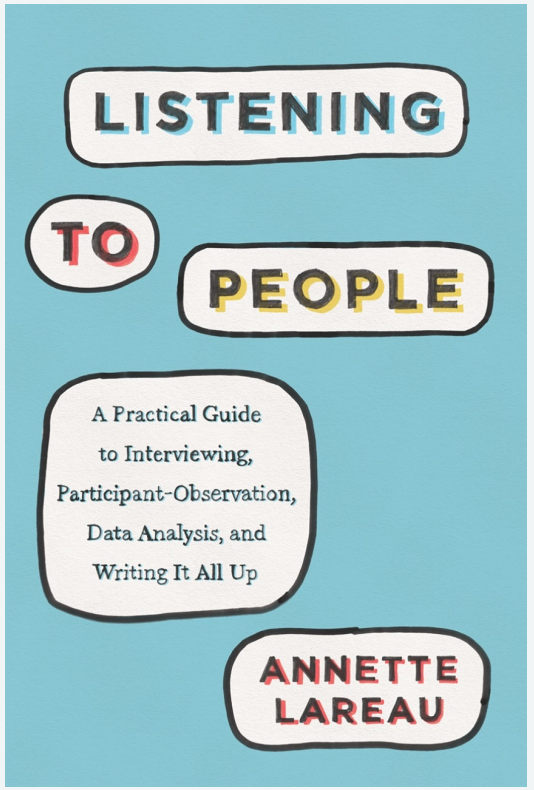
Further Readings



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*