NVivo Course

Data Analytics Service

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1 Welcome

2 Welcome to the NVivo Course

This course is designed to provide you with a **comprehensive introduction to NVivo**, with a specific focus on working with **interview transcripts** for qualitative analysis.

Whether you're a beginner or someone revisiting NVivo after a break, this tutorial walks you through all the essentials—from opening the software to importing and working with your data.

2.1   Who Is This Tutorial For?

- Students or researchers conducting **qualitative research**
- NVivo users working with **interview transcripts, focus groups, or documents**
- Anyone new to NVivo or using it in a **university research setting**
- Those wanting a **guided, self-paced learning resource**

No prior experience with NVivo is required.

2.2   What Will You Learn?

By the end of this course, you'll know how to:

- Navigate the NVivo 14 interface with confidence
- Create and manage NVivo projects
- Create documents directly within NVivo for notes or journaling
- Prepare and import transcripts for analysis
- Understand best practices for organizing qualitative data

2.3   What's Covered

This course is divided into the following foundational topics:

- **Opening and setting up NVivo**
- **Understanding the interface**
- **Creating internal documents**
- **Importing and preparing transcripts**

Each chapter is concise, task-focused, and easy to follow.

2.4   Who Created This Course?

This tutorial was developed by the **Data Analytics Service** at the **University of Sheffield**.

We hope it empowers researchers with the tools they need to work confidently with qualitative data.

2.5   How to Use This Tutorial

You can move through the chapters in order or jump to the sections most relevant to your workflow. Each page stands on its own, but they work best as a **step-by-step guide**.

To begin, select a chapter from the sidebar or the **NVivo Basics** section in the table of contents.

Let's get started!

Part I

PART 1 · NVivo Basics

3 Opening NVivo and Creating a Project

3.1 Opening NVivo

To open NVivo on Windows, go to the **Start Menu**, navigate to the **QSR folder**, and select **NVivo 14**. Upon launch, you'll be greeted with a welcome screen.

> **ℹ Note**
>
> Some options like "Sign In" and "Collaboration Cloud" may not apply to institutional users (e.g., University of Sheffield), and will show a message if not configured.

3.1.1 Useful Areas on the Start Screen

- **Getting Started**
  This section includes video tutorials and guides on:

  - Preparing transcripts for import
  - Formatting survey data for NVivo
  - Conducting thematic analysis
  - Writing memos or journals

- **Help System**
  NVivo uses a **question mark (?)** icon instead of the word "Help". Look for this icon throughout the software to access help resources.

- **Learn and Connect**
  Includes links to NVivo's learning materials and social platforms.

- **Recent Projects**
  A quick-access list of projects you've recently worked on.

3.2 Creating a New Project

To start working in NVivo, you'll need to create a **project file**. This file will hold all your: - Interview transcripts - Coding - Annotations - Queries - Reports

3.2.1 Steps

1. Click the **New Project** button (white button on the left).
2. A dialog box will appear asking you to:

   - **Name** your project
   - **Choose a save location**
   - Optionally, add a **description**

Once saved, your project will open and you can begin importing data or documents.

> 💡 Tip
>
> Use clear, concise project names. For example: `qualitative_study_2025.nvp`

4 The NVivo Interface

4.1 NVivo Environment Overview

Once you create or open a project in NVivo, you'll see the main workspace — a clean layout divided into useful panes, tabs, and ribbons.

To give you a proper tour, it's easier to use a **sample project** so that the screen contains actual data and features to show.

4.2 The Ribbon

The **Ribbon** in NVivo is the toolbar that runs along the top. It contains all major tools and is grouped into several tabs:

4.2.1 File (Blue Button)

- Opens the **Project menu**, which allows you to save, close, or copy the project.
- Opens a separate screen (not a ribbon).
- Used occasionally, mostly for file-level operations.

4.2.2 Home Tab

- Central hub for common actions:
    - Coding
    - Running queries
    - Viewing data visualizations

4.2.3 Import Tab

- Used to bring external content into NVivo:
  - Word, PDF, images, video/audio
  - Survey data (e.g., from Qualtrics)
  - Bibliographic data (EndNote, Mendeley)

4.2.4 Create Tab

- Lets you create content **within NVivo**:
  - Documents and memos (basic word processing tools included)
  - Framework matrices
  - Nodes (codes)

> 💡 Tip
>
> You can write directly in NVivo instead of using Word or Google Docs — great for journaling or annotations.

4.2.5 Explore Tab

- Access searches and exploration tools.
- Go beyond coding with:
  - Word frequency and text search
  - Cluster analysis
  - Social network analysis

> ℹ Note
>
> NVivo's search and exploration tools have been core to its power since the early **Nud*IST** days.

4.2.6 Share Tab

- Export your work to share with others:
  - Reports as Word or Excel
  - Images of visualizations
  - Codebooks or queries

Note: NVivo doesn't support direct posting to social media or emailing content.

4.2.7   Modules Tab

- Integrates with extra NVivo modules:
    - **Transcription service** (automated, paid)
    - **Collaboration Cloud** (not currently supported by all institutions)
    - **Microsoft OneDrive integration**

> ⚠️ Warning
>
> Always check with your institution about data protection before using cloud-based features like Collaboration Cloud.

4.3   Contextual Ribbons

Contextual ribbons appear **based on what you're working on**.

For example, if you're editing a document, you'll see the **Document ribbon** with relevant tools. If you're not in a document, it disappears.

This can be confusing — just remember: **where you click matters**.

4.4   Top-Right Utility Icons

At the top-right of the NVivo window, you'll see small icons:

- **Login icon** – Often non-functional in institutional setups
- **Save icon** – Save your current project (like other apps)

This completes the visual and functional tour of NVivo's interface.

5 Creating Documents in NVivo

5.1 Why Create Documents in NVivo?

In most cases, you'll import transcripts or notes from external files. But there are a few excellent reasons to create documents directly inside NVivo:

- **Activity Logs**: Jot down what you did in each session for future reference or team communication.
- **Fix Transcripts**: Correct transcription errors *inside NVivo* without re-importing or re-coding.
- **Appendix Material**: Useful for documenting your research process in a structured way.

Example log entries:

```
16 Aug - Imported volunteer interviews from Melbourne
19 Aug - First pass of Ken's interview: initial themes
30 Aug - Ran search for "career", saved query but not results
```

5.2 How to Create a Document

There are two main ways:

5.2.1 Method 1: Use the Create Ribbon

1. Go to the **Create** tab in the Ribbon.
2. Click the **Document** button (page icon).
3. The "New Document" dialog appears.

5.2.2   Method 2: Right-Click in List View

1. Go to **Files** in the Navigation View.
2. Right-click in the **List View** and select:

   - **New File > New Document**

This approach is great when the Ribbon isn't visible or responsive.

5.3 The New Document Dialog

You'll see two fields:

- **Name** – like a filename (e.g., `Activity Diary`)
- **Description** – longer text (e.g., *"Short notes on tasks carried out in NVivo during data analysis."*)

There's also an **Attribute Values** tab — this is typically **not needed** for journal-like documents.

> 💡 Tip
>
> Keep a single document as an internal log to track your project's progress over time.

5.4 Contextual Behavior

Once you create or open a document:

- The **Ribbon** updates with new tabs:
  - `Document` tab
  - `Edit` tab

- If nothing shows in the **List View**, click **Refresh** or check the filters.

> ⚠️ **Warning**
>
> Right-click menus and ribbon options depend on *where you last clicked.* If things disappear, check your focus!

6 Importing Interview Transcripts

6.1 Why Import?

Most researchers transcribe interviews using Word or a transcription service. Rather than copy/paste or retype content into NVivo, you can **import multiple transcripts at once** — clean, efficient, and avoids rework.

6.2 Recommended Workflow

We recommend a **3-step process**:

6.2.1   1. Prepare NVivo to Receive Transcripts

6.2.1.1 Create a Subfolder

- Go to the **Files** section under **Data** in the Navigation View.
- Create a new folder (e.g., **Transcripts**).
- Give it a clear name and description.

Example: > Folder: `Transcripts`
> Description: *"Interviews on volunteering experiences"*

6.2.1.2 Set Up File Classifications *(Optional)*

Useful if you want to attach metadata (e.g., gender, role, location) to each transcript file.

6.2.2 2. Prepare Your Transcripts

This step makes the import more structured and helps with later analysis.

6.2.2.1 Speaker Identifiers

Start each speech turn with a label: - `Int`: Interviewer - `PtA`, `PtB`, etc.: Participants - Or use first names (with caution re: bias & anonymity)

```
Int: Can you tell me about your volunteer role?
Anna: I started volunteering in 2021...
```

6.2.2.2 Use Heading Styles

If your interviews follow a structured protocol, use Word's **Heading 1 / 2** styles for questions or sections. This enables **auto-coding** by structure.

6.2.2.3 Add Timestamps (for Audio Link)

If syncing to an audio file, insert timestamps like `[00:02:15]` at the start of each speaker turn. NVivo can use this to sync transcript and audio.

6.2.3 3. Importing the Documents

1. Navigate to **Files** in NVivo.
2. Click the **Import** tab in the Ribbon.
3. Choose **Documents** and select your transcripts from disk.

   NVivo won't know your last used folder — navigate to the correct directory manually.

Imported documents will appear in your project under the selected folder, ready to code, classify, or query.

6.3 Wrapping Up

Being intentional about how you import and format your transcripts gives you cleaner data and smoother analysis later on.

> 💡 Tip
>
> Organize early — future-you will thank you!