

# Introduction to NVivo: Qualitative Coding for Text Analysis

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for  
Pr. Megan Denver  
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Northeastern University  
*NULab for Texts, Maps, and Networks*

*Feel free to ask questions at any point  
during the presentation!*

# Workshop Agenda

- Workshop objectives
- Qualitative Coding: annotating and highlighting sources
- What is NVivo?
- Important vocabulary and functions
- NVivo demonstration

Slides & handouts at <https://bit.ly/diti-fa21-denver-nvivo>



# Workshop Objectives

- Define qualitative coding and why it can be useful while doing research
- Understand what NVivo is as a research tool and what it can do
- Learn important NVivo-specific vocabulary to aid independent research



# Qualitative Coding

Qualitative coding is when you create a list of themes, or a **schema**, that you want to analyze in a primary/secondary source. Then, you review those sources and highlight particular instances in the text according to those themes.



# Coding in practice

key, at that point.

M: Sure sure, so I did not understand, what was the comparison with other five, with other locals, did they have more issues or less, or did they also have that similar experiences like you, across all those different locals [26]

R1: They had, you know, similar experiences that I did. Very strong, present, you know, walking. I didn't see hear, early on, anyways for the initial, when we pulled them that day, the Thursday, that anyone was saying "I'm not going". Didn't hear that from anybody. Didn't hear it from my local, didn't hear it, you know because all the locals have facebook pages too. You know, they have, social pages, so you can also keep in touch that way, and, you know, between reading and [unclear], you know talking to [unclear] and stuff like that, we were hearing nothing but positive feedback, on on, people walking. People were ready. They were angry, with the contract that was being presented, and they were ready, they were ready to take it, to go to the sidewalk [27] so to speak. And then, and to state their point, yep.

M: Can I maybe ask you yes, related to that anger, like, how did people, hm how to say, how did they precisely rationalize their anger, or, how did they justify their anger. What did they say, who, or how did they understand, why that injustice was being done to them. How did they understand why the managers at all decided to offer them such a bad contract, how did they think about that anger?

R1: Sure. So, with that, when we, when we, with the organizer, we met earlier, weeks earlier to, so, we met up in [unclear], the organizer brought as many - you know, every, its open invitation, to any local member of the store, to come to this, rather large gathering of people [28] where he broke down the contract. So, not only if you couldn't make, these contract breakdowns came back to the store, and were handed out to, individuals to read, and were posted on the union board. So, the people had time to see, what the contract, you know, here



# What is NVivo?

NVivo is a **text analysis** and **research organization** software that is available through MyNU. NVivo allows you to annotate and code documents using user-created tags (nodes/codes), summarize and visualize these codes, and organize research materials.

NVivo is particularly helpful for organizing and annotating research materials such as:

- secondary sources: scholarly articles you read for the literature review, newspaper articles, book chapters.
- primary sources: any primary sources you may be analyzing such as interview transcripts, texts, or field notes
- your own notes about your project (you can even compose in NVivo)



# What can NVivo do?

NVivo is designed for qualitative coding research materials, such as survey results, interviews, audio recordings, text documents, articles, and other data formats. It also has other functions:

- Create projects that store, organize, and code documents/files
- Provide a method for you to code your documents with a user-created coding schema (nodes)
- Query, summarize, organize, and visualize information about your coding
- Conduct forms of computational text analysis, like word counts, on the documents themselves



# NVivo for Annotating & Coding Research

With NVivo, you can store and organize your **primary** and **secondary** sources together (most file types work, including images). You can also separate your different types of research materials. For this project, your research materials are your interview transcriptions.

NVivo also allows you to **annotate** texts and use **qualitative coding** methods to highlight specific texts/images/pieces under themes.

Then you can **summarize** and **visualize** these annotations and codes.





# NVivo Vocabulary

Full definitions are available on the handout

- **Data:** your research documents & files
- **Codes:** the method to annotate the themes/concepts
- **Nodes:** the actual themes/concepts that you create
- **Relationships:** coding connections between two data items
- **Cases:** units of analysis for your research.
- **Maps:** visualization tool to see connections between the cases and nodes
- **Query:** a flexible way to explore and analyze your files, cases, and nodes



# NVivo is NOT cross-platform friendly

The Mac and PC versions of NVivo—as well as the version numbers—are different and have different file types.

- Mac NVivo projects end in .npvx and can only open that file project type
- Windows NVivo projects end in .npv, but can open both .npv *and* .npvx
- Version numbers (10, 11, 12) also affect which projects can be opened on which platform

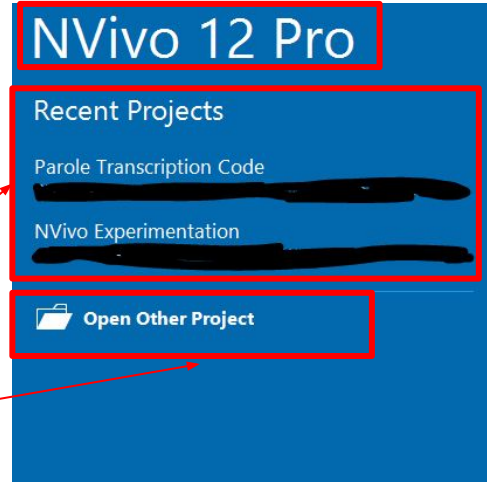


# Anatomy of NVivo: Opening on Windows

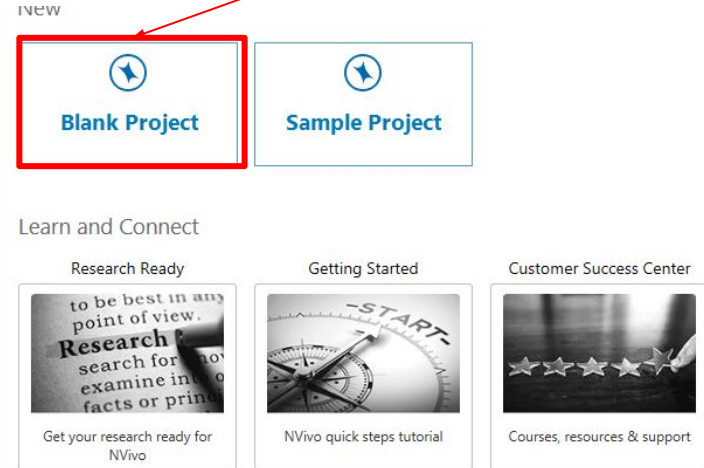
Your version number (you should have version **11** or **12**)

The recent projects you opened

Open another project that is not recent

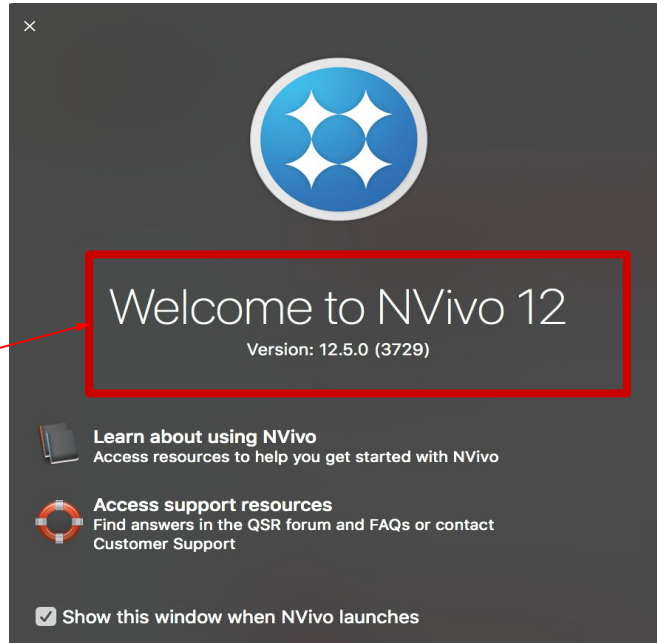


Create a new **project** (stores all your documents, codes, etc)



# Anatomy of NVivo: Opening on Macs

Your version number (you should have version 11 or 12)



Create new project  
Create a new project

Create a copy of the sample project  
Explore and experiment with NVivo using the sample project

Create a new **project** (stores all your documents, codes, etc)

Parole Trans Code\_...sion (NVivo 12).nvp  
~/Downloads

TEST.nvp  
~/Documents

Untitled.nvp  
~/Documents

Sample Project.nvp.nvp  
~/Downloads

The recent projects you opened

Open Another Project...

Open

Open another project that is not recent



# Anatomy of NVivo: Projects on Windows

Toolbar to access functions

Menu to access files, nodes, cases, notes, etc.

Files

Name	Codes	References
Amann Reasons Transcription	0	0
Angel Rivera 2	0	0
Antonio F Codebook	19	20
Ayala 2005 Codebook	15	15
Ayala 2005 Transcript Kelly	33	54
Ayala 2010 Codebook	21	23
Ayala 2010 Transcript Kelly	31	71
Clements 2011 Codebook	26	30
Clements 2011 Transcript Kelly	67	168
Clements 2013 Codebook	25	28
Clements 2013 Transcript Kelly	41	100
Don S Codebook	31	36
FERRER Codebook	54	66
Ferre parole hearing 2008 shared FINAL	55	169
Gerald Hill Codebook	16	16
ghlney	0	0
Gibney Gabriel	0	0
Hill 2012 Codebook	27	28
Hill 2012 TRANS Tashila	7	7
Jose Robles	0	0
Mendoza Codebook	23	26
MENDOZA parole hearing transcript shared FINAL	43	109
Mongo 2011 Codebook	18	23
Mongo 2011 Transcript Kelly	51	141
Monterio Codebook	24	27
Monterio parole hearing transcript shared FINAL	48	124
Noonan 2007 Codebook	25	27
Noonan 2007 Transcript Kelly	78	287
Pope 2011 Codebook	25	27
Pope 2011 Transcript Kelly	0	0
Ralph Geary	0	0
Rambert 2013 Transcript Stuti	81	356
Rambert 2013 Transcript Stuti (2)	0	0
Robin Murphy	0	0

Amann Reasons Transcription

Click to edit

Michael Amann (Reasons)

MA: First I would like to thank this Board for considering whether or not I am a worthy candidate for parole. I am here to answer any questions or concerns that you may have. I do take full responsibility for the sexual assault and murder of Ms. Kathleen Boardman. At the time of the offense, I did not see Ms. Boardman as a true person but as someone who I could take my anger out on... (inaudible) I alone am responsible for what I have done and deserve all the blame for my depraved behaviors. I am truly sorry for the acts that I have committed and the pains that I have inflicted on Ms. Boardman as well as the long-lasting pain and suffering that was placed upon her family as well as my own. Today I feel some of the pain that her family endures... I feel the shame, guilt and remorse for the acts that I have committed and I see some of the impacts that it has left. I know today that I am not that same 17-year-old individual that I was then. After being incarcerated for thirty plus years, I entered a sexual offender treatment program. While I was in this program, I took as many classes as possible. I have come to (inaudible) and I know (inaudible) as a child with aggression, and the punitive environment that I lived in, that allowed to inflict pain on myself and as well as on others. My belief system (inaudible). My feeling good about myself depended on my code of conduct approving what I did. I thought I needed his approval and sought out his elevation at any cost, to a point I did not feel accepted without his approval. (inaudible) towards females, whether I liked them or not, to make sure that he would not leave me. Through the program I have come to understand that why alcohol and substance abuse has been a major issue in my life. Growing up in an alcoholic household, I believed that it was normal to use alcohol to escape from reality or when problems arise. I also see how alcohol contributed to my anger reaching to a physical level. All of these programs, I have made genuine changes and integrated them into my everyday life and living. I realized that I cannot change on my own or be afraid to ask for help. They began to restore my capacity to be emotionally connected... and while at the sex offender treatment program, I have learned to trust myself and if I had a problem, who to go to and who not to. I know I must always be aware of my (inaudible), at all times. I am able to channel my thoughts and release, where I was not able to in the past. On parole, I will continue to attend AA and NA groups, SOTP classes and (inaudible). I know I will never be able to show my victim how sorry I am or how I have changed but if I am released on parole, I will show that someone like me can and will be a responsible member of society.

SD: .... Why don't you tell the board a little bit about your upbringing?

MA: Um... my upbringing was in a very harsh environment. My parents... both my parents were (inaudible). My mother passed away by overdose. My father abandoned us, so I grew up primarily in my grandmother's home. And that home, it was a very alcoholic environment, very abusive environment with physical and psychological abuse. Um... we were... me and my

The window that will open the files, queries, etc. You can annotate documents here.

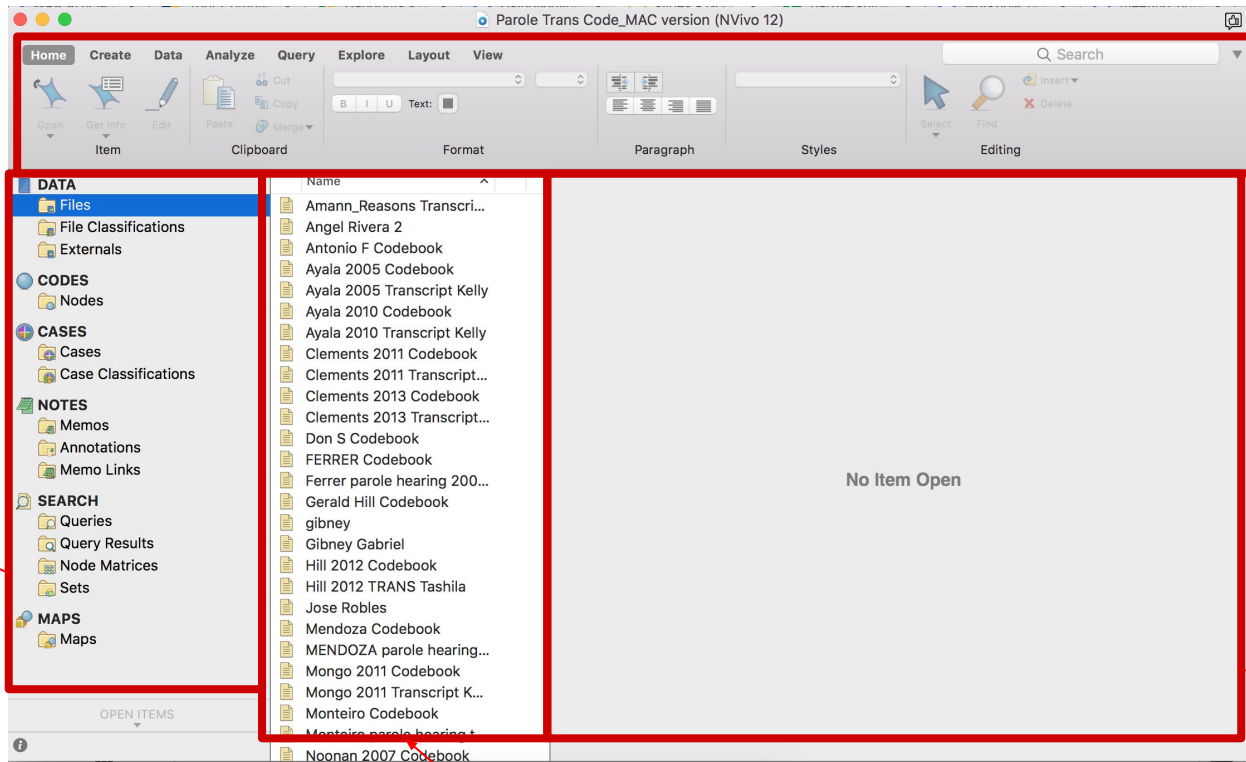
List of nodes, files, etc.



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Feel free to ask questions at any point during the presentation!

# Anatomy of NVivo: Projects on Macs



Toolbar to access functions

Menu to access files, nodes, cases, notes, etc.

The window that will open the files, queries, etc. You can annotate documents here.

List of nodes, files, etc.

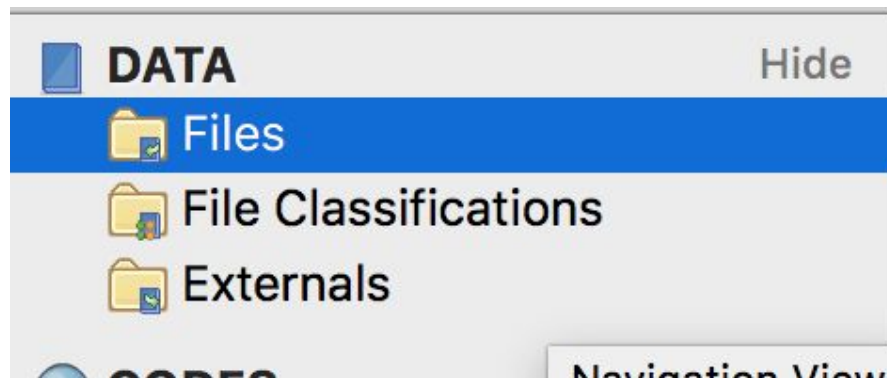
*Feel free to ask questions at any point during the presentation!*



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# Data

The “Data” in NVivo are all the research materials you are using (scholarly articles, transcriptions, newspapers, research notes, etc.).



“Files” will be where you can access all the research materials you have imported into this project.



# Important Reminders

NVivo can import all types of files, including .docx, .pdf, .doc, .csv, .png, .jpeg, .txt, video/audio files, and more.

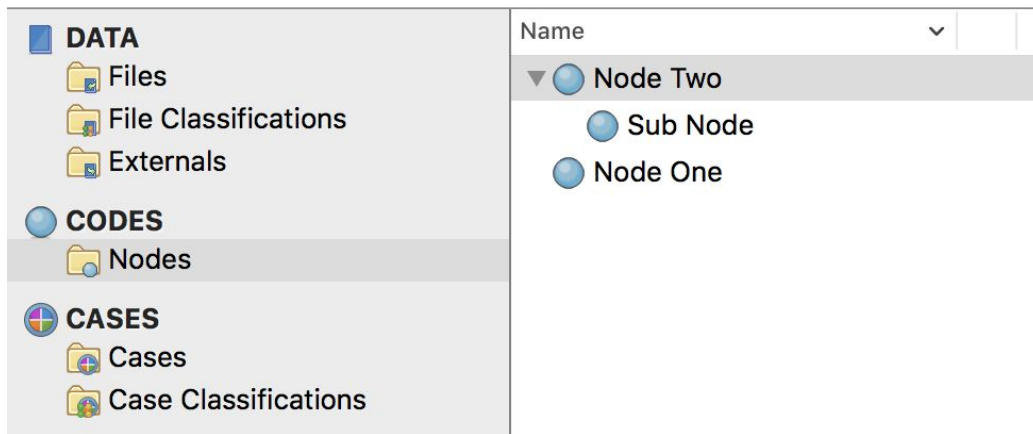
You should always **save** your original documents on your local computer or in cloud storage, even if these documents are imported into NVivo. NVivo can store documents, but it is more of an organization and analysis tool, rather than a storage option.





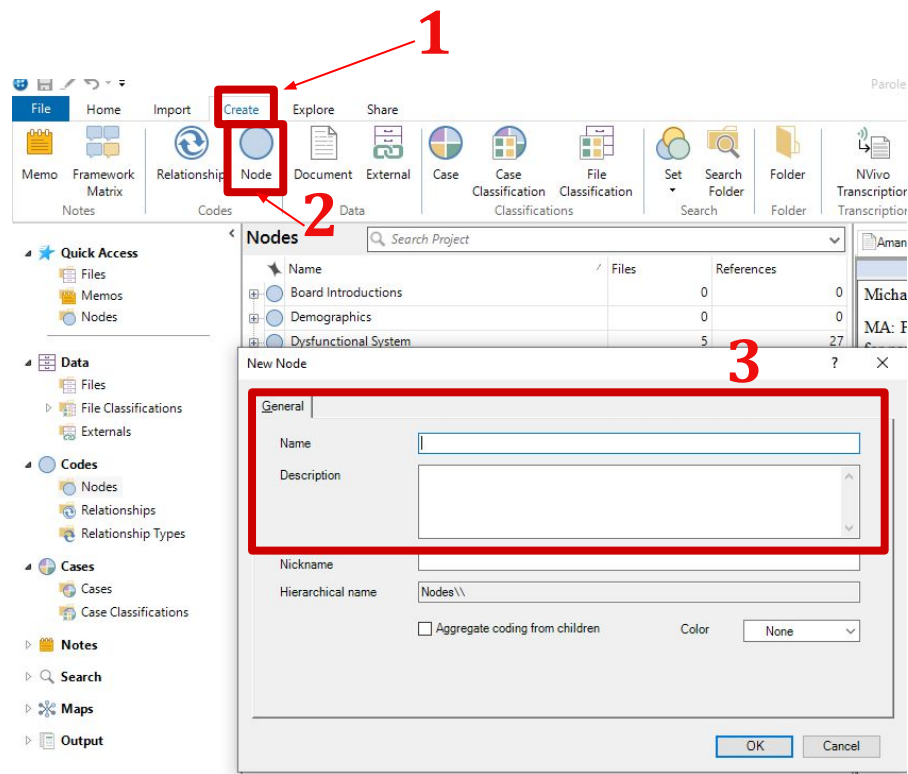
# Codes and Nodes

The list of nodes you will use to code your files. The “nodes” folder will be empty until you add your own! You can add nodes and sub-nodes



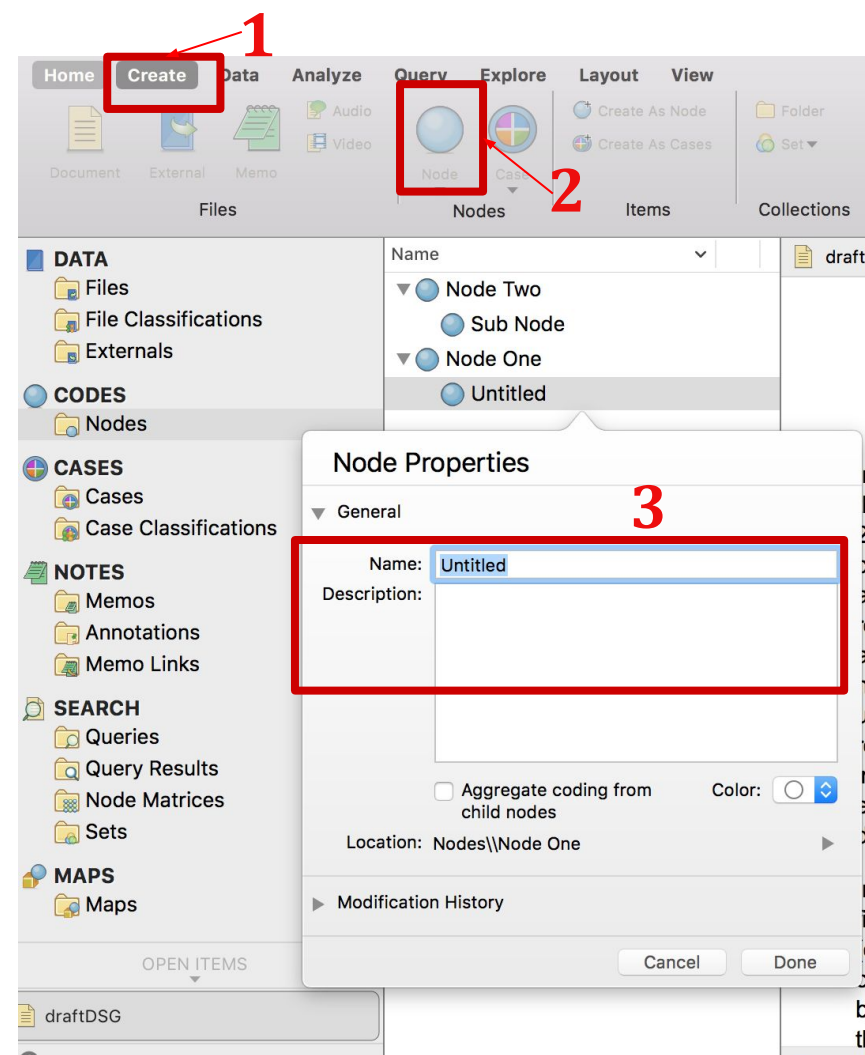
# Creating Nodes

1. Go to “Create” in the toolbar
2. Click “Node”
3. Your new node will pop up and ask for a name and description
  - a. To add a *subnode*, follow the same steps, but click on the original node where you want to add the subnode



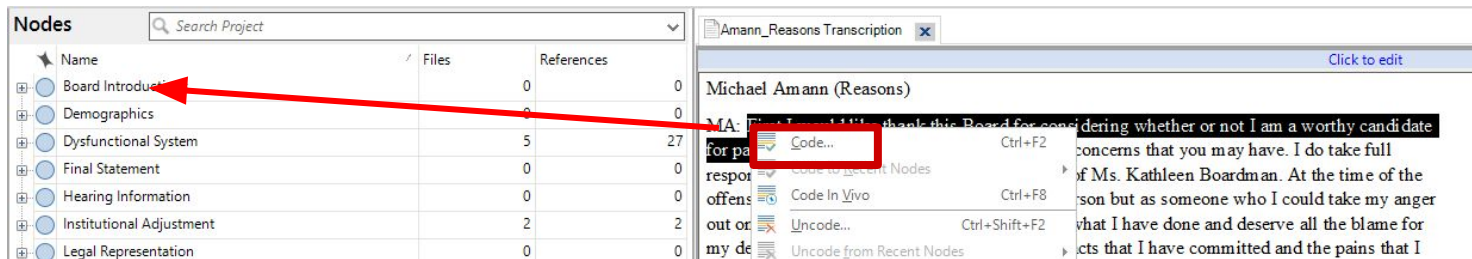
# Creating Nodes (Mac)

1. Go to “Create” in the toolbar
2. Click “Node”
3. Your new node will pop up and ask for a name and description
  - a. To add a *subnode*, follow the same steps, but click on the original node where you want to add the subnode



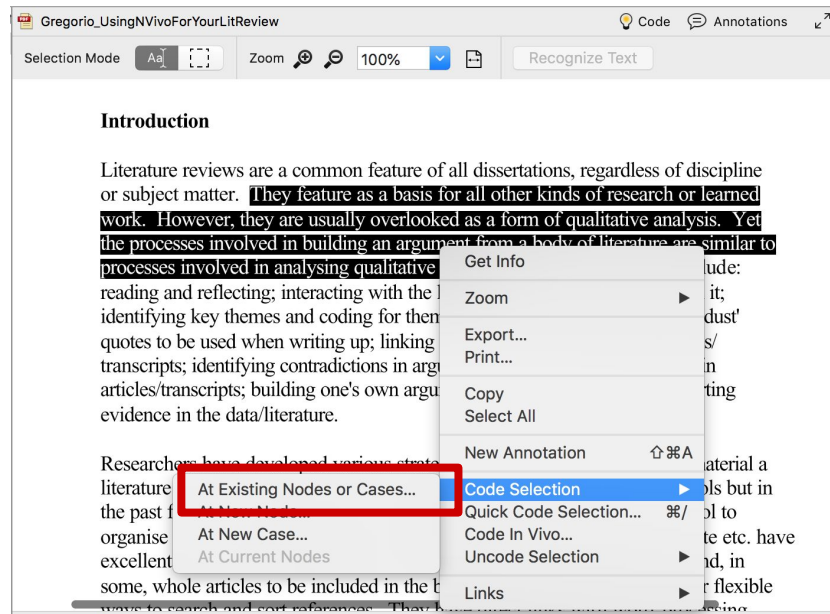
# Coding Files/Documents (Windows)

1. Open the file you would like to annotate
2. Highlight the text you want to code
3. Drag and drop the selection onto a node
4. Alternatively, you can Command/Control+click and select “Code”
5. You can also add new nodes/cases as you annotate



# Coding Files/Documents (Macs)

1. Open the file you would like to annotate
2. Highlight the text you want to code
3. Command/Control+click and go to “Code Selection”
4. Click “At Existing Nodes or Cases”
  - a. Once you use nodes, the nodes will show up when you click “Code Selection”
  - b. You can also add new nodes/cases as you annotate



# View Your Codes (Windows)

1. Go to “Document” in the toolbar
2. Click “Highlight” then “All Coding”
3. Click “Coding Stripes” and “All Coding” to see the code names and where they appear in the document.
  - a. If you have tagged an entire file as a “case,” everything will be highlighted. Simply choose “Coding for Selected Items”

The screenshot shows the NVivo 12 Pro interface. The 'Document Tools' menu is open, showing 'Highlight' and 'All Coding'. The 'Coding Stripes' pane on the left shows a list of codes and their matches. The document text on the right is highlighted with coding stripes. The highlighted text includes:

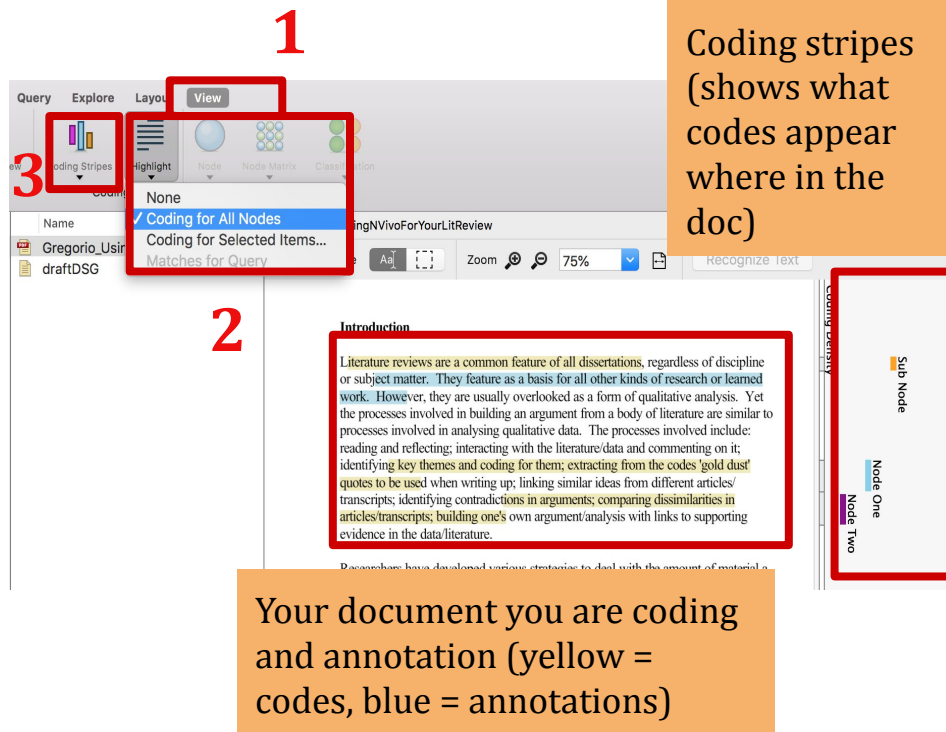
- A- Yes
- C- 20 years have gone by. So I know, when I look at your record, I should see some significant changes in a 15-year-old boy that did that crime. That has painted that particular area, and those individuals in that area, in the Boston, Dorchester, and Roxbury community. I know that you've done significant programming since then, right? You've changed your life.
- A- Yes
- C- What have you done?
- A- Um, Violence, Violence Reductions, um, Cognitive Thinking.
- C- I don't see any sex offender treatment.
- A- I have not taken the sex offender treatment program. I've asked to go over to the treatment

Coding stripes  
(shows what codes  
appear where in  
the doc)

The document you are coding and annotations

# View Your Codes (Macs)

1. Go to “View” in the toolbar
2. Click “Highlight” then “Coding for All Nodes”
3. Click “Coding Stripes” and “All Nodes Coding” to see the code names and where they appear in the document.
  - a. If you have tagged an entire file as a “case,” everything will be highlighted. Simply choose “Coding for Selected Items.”



The screenshot shows the NVivo software interface. A red box labeled '1' highlights the 'View' menu. A red box labeled '2' highlights the 'Highlight' option in the 'View' menu. A red box labeled '3' highlights the 'Coding Stripes' option in the 'Highlight' submenu. The document text is shown with yellow highlights (codes) and blue highlights (annotations). A sidebar on the right shows the 'Coding Stripes' panel with 'Sub Node', 'Node One', and 'Node Two' listed. A text box on the right explains that coding stripes show where codes appear in the document. Another text box at the bottom explains that yellow highlights represent codes and blue highlights represent annotations.

1

Coding stripes (shows what codes appear where in the doc)

2

3

Your document you are coding and annotation (yellow = codes, blue = annotations)





# Annotating Files (Windows)

To annotate (comment), follow the same steps as coding except click “New Annotation” instead after you highlight and Command/Control click. Find all your annotations in the “Notes/Annotations” section in the left menu.

The screenshot illustrates the workflow for annotating files. On the left, the 'Notes' section in the sidebar is highlighted, indicating where all annotations are stored. The central 'Annotations' panel shows a list of annotations for the file 'Amann\_Reasons Transcription'. The main document window shows a text file with a specific paragraph highlighted in orange. Below the text, an 'Annotations' table is visible, showing a single entry with the content 'This is an annotation'.

Item	Content
1	This is an annotation

**List of annotations**

**Where you can find all your annotations listed**

**Your annotation**

**The text from the document you highlighted and are annotating**

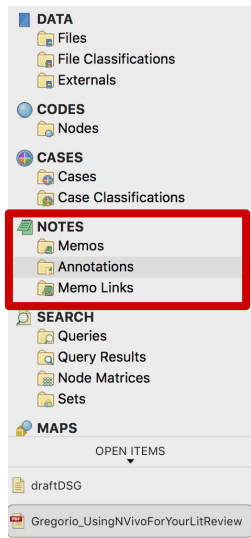




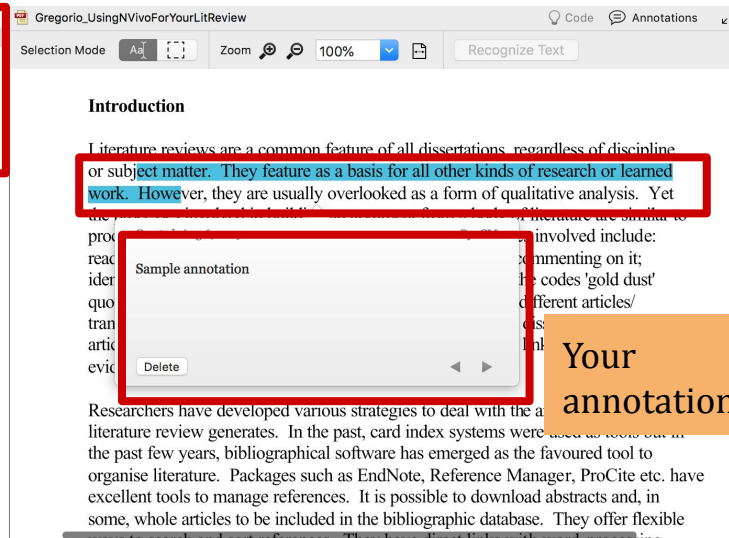
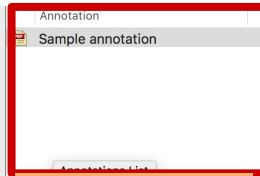
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To annotate (comment), follow the same steps as coding except instead click “New Annotation” after you highlight and Command/Control+click. Find all your annotations in the “Notes/Annotations” section in the left menu.

Where you can find all your annotations listed



List of annotations



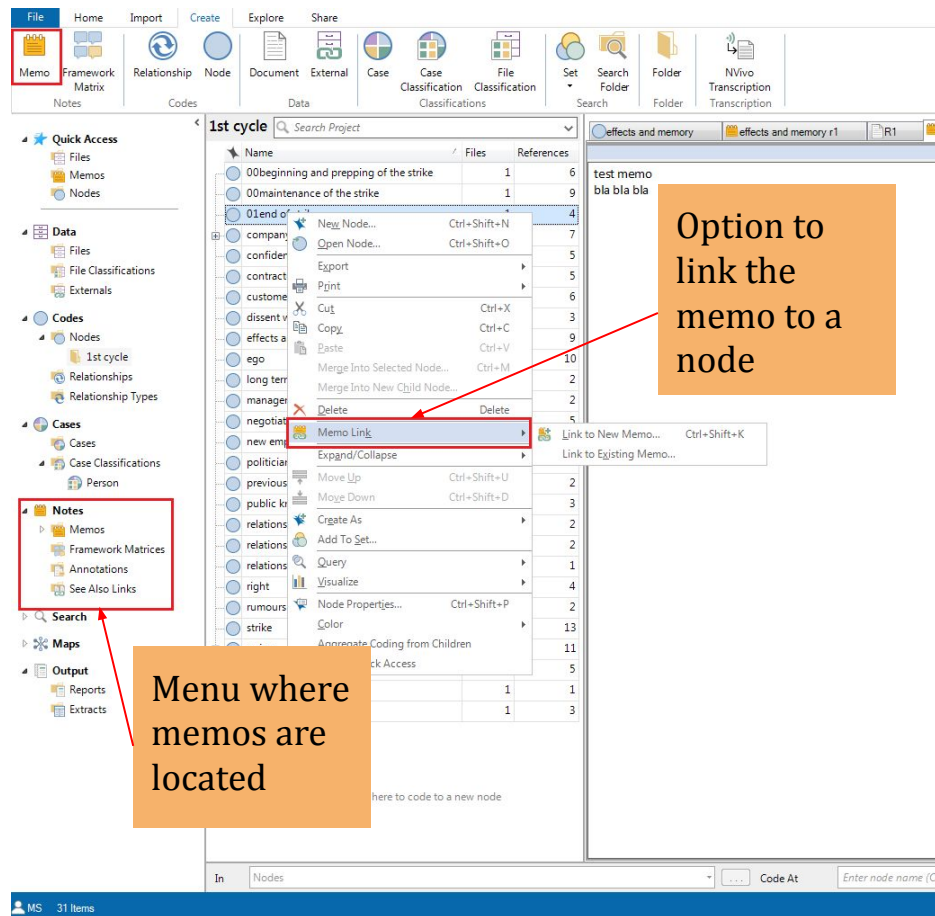
The text from the document you highlighted and are annotating

Your annotation



# Memos (Windows)

- Memos are more extended write-ups of your analytical insights
- They can stand alone, but also be linked
- “Memo link”: linking memo to a particular file, case, or node



# Memo Links (Windows)

Showing the link between the file and the memo

Accessing the memo from the file



# Memos and Memo Links (Mac)

This screenshot shows the 'Create' menu in the software interface. The 'Memo' option is highlighted with a red box. An orange callout box points to the 'Memo Link' option in the 'Create' menu, with the text 'Option to link the memo to a node'. Another orange callout box points to the 'Memos' option in the 'NOTES' section of the sidebar, with the text 'Menu where memos are located'. A third orange callout box points to the 'Memo Link' option in the 'Create' menu, with the text 'Showing the link between the file and the memo'.

Home Create Data Analyze Query Explore

Document External Memo Files Nodes Items Collections Classifications Transcription

Menu where memos are located

Option to link the memo to a node

Showing the link between the file and the memo

Navigating memo creation

This screenshot shows the 'Memo Link' option in the 'Create' menu. The 'Memo Link' option is highlighted with a red box. An orange callout box points to the 'Memo Link' option in the 'Create' menu, with the text 'Showing the link between the file and the memo'. Another orange callout box points to the 'Open Linked Memo' option in the 'Memo Link' submenu, with the text 'Accessing the memo from the file'. A third orange callout box points to the 'Memo Link' option in the 'Create' menu, with the text 'Option to link the memo to a node'.

Home Create Data Analyze Query Explore Layout View

Document External Memo Files Nodes Items Collections Classifications

Accessing the memo from the file

Option to link the memo to a node

Showing the link between the file and the memo

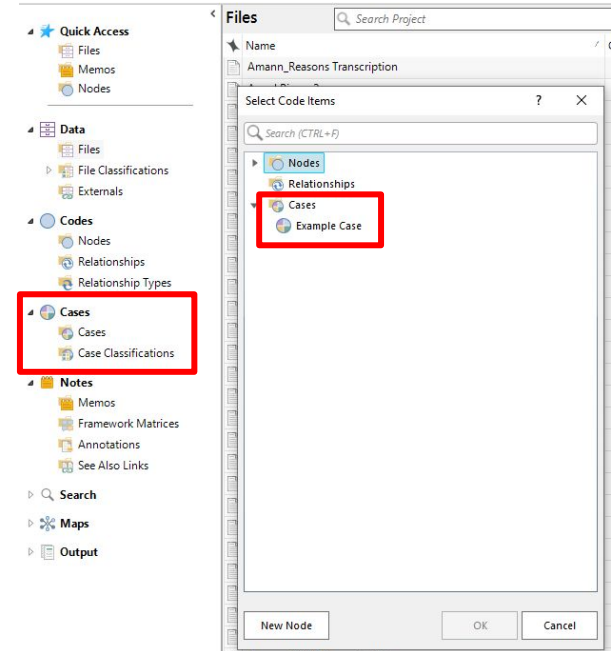


# Cases (Windows)

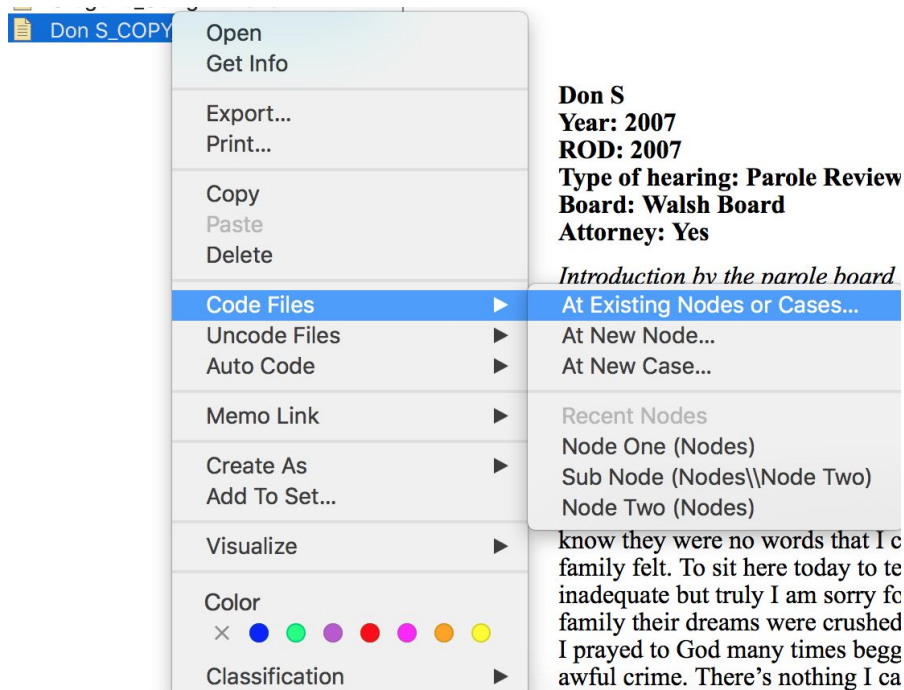
Cases are the types of research texts in your project; they can be organized based on your selections. **“They might represent people, places, events, organizations or other entities that you want to analyze and compare.”** For example, if you have several transcripts from different trials, but want to categorize the type of trial for each text, you would use cases to do so.

-“About Cases”, [NVivo](#)

To add a “case” to a file, it’s the same method as adding a node, except you choose the “Cases” folder and the proper case.



# Cases (Macs)



To add a “case” to a file, it’s the same method as adding a node, except you choose the “Cases” folder and the proper case.





# Querying

**Querying**, or asking something from your data, in NVivo provides multiple ways to explore both your codes and your texts.

- **Word Frequency:** Counts the number of times words (with stopwords removed) appear in one or more files
- **Coding:** Shows the number of codes, the text that was coded, and the files
- **Crosstab:** Cross-references nodes and case classifications. For example, you might want to know how often a particular node appears in both scholarly articles and your primary texts.



“Query” can be found in the “Explore” Tab

To query multiple items, select the items you would like to query in the “Selected Items” tab and then click “Run Query”



*Feel free to ask questions at any point during the presentation!*



# Word Frequency Example (Mac)

Select the items  
you would like to  
query in the  
“Selected Items”  
tab and then click  
“Run Query”

Unsaved Query

Word Frequency Criteria

Search in: Files and External... **Selected Items** Items in Selected Folders

Finding matches: ☒ Exact match only (e.g. "talk") ☐ Include stemmed words (e.g. "talking")

Display words: ☐ All ☒ 1000 most frequent

With minimum length: 3

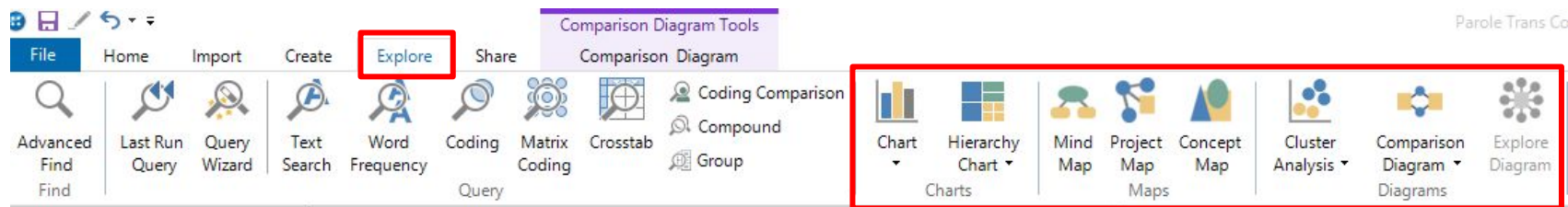
**Summary** Word Cloud

Word	Length	Count	Weighted Percentage
parole	6	525	3.45%
board	5	172	1.13%
decision	8	105	0.69%
time	4	93	0.61%
release	7	83	0.55%
offense	7	68	0.45%
decisions	9	66	0.43%
inmates	7	60	0.39%
neutralization	14	57	0.37%
criminal	8	54	0.35%
members	7	54	0.35%
hearings	8	52	0.34%
research	8	51	0.34%
served	6	50	0.33%
study	5	50	0.33%
also	4	49	0.32%
justice	7	49	0.32%
offender	8	49	0.32%
prior	5	47	0.31%



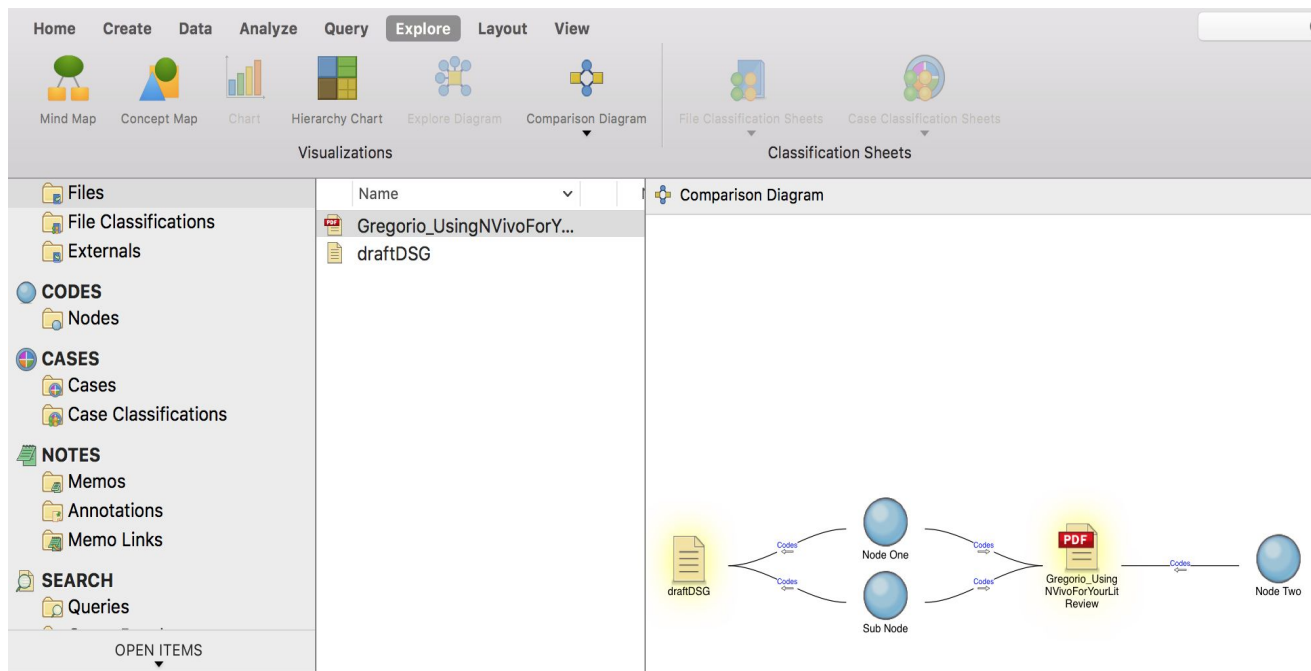
# Exploring Codes (Windows)

- Chart: bar chart of the number of times codes were used in a file
- Hierarchy Chart: visualizes number of codes used in a file
- Explore Diagram: explore the codes used in a file
- Comparison Diagram: compare the nodes used in multiple files



# Exploring Codes (Macs)

Comparison  
diagram  
example



# Qualitative Coding is about *Interpretation and Arguments*

The nodes you create are themselves **arguments**;  
you are choosing what information you value and  
want to extract from the transcripts



# Demonstration of Tool

Using our own examples, we will quickly show you how to input the documents, code, and visualize your codes.

We will do this both for interviews and social media examples.

You will be doing this on your own in a minute, so take this time to watch and ask questions!



# Group Discussion

- What did you find surprising or interesting in your exploration of the tool?
- What are some challenges you faced? How might you work with these as you move forward?
- How else might you use NVivo in your future studies/career?



# Thank you!

If you have any questions, contact us:

DITI/NULab team  
[nulab.info@gmail.com](mailto:nulab.info@gmail.com)

Slides, handouts, and data available at  
<https://bit.ly/diti-fa21-denver-nvivo>

Office hours for help with NVivo: <https://calendly.com/diti-nu/>



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