



# Getting Started with NVivo

2020



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# Welcome to the Research Commons!

- Workshops and One-on-one Consultations
  - Thesis Formatting
  - Citation Management
  - SPSS
  - NVivo
- Literature Reviews (Part 1 and 2)
- Graduate Student Writing Community

*Check the Website for more*



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# Getting NVivo

- UBC Library has NVivo on its computers (Room 217 and 218)
- From Nov. 21, 2016, NVivo is available to UBC students, faculty and staff  
Instructions: <https://it.ubc.ca/services/desktop-print-services/software-licensing/nvivo-pro-software>
- For new students, go to the following link (google- [UBC On the Hub](#))
- 14-day free trial available to anyone at:  
<http://www.qsrinternational.com/trial-nvivo>



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# Learning Objectives

By the end of this session,

- You will be able to import files
- Create annotations and memos
- Code your data into nodes (parents and children nodes) and relationships (on the PC version)
- Link nodes to memos
- Run basic queries and save them



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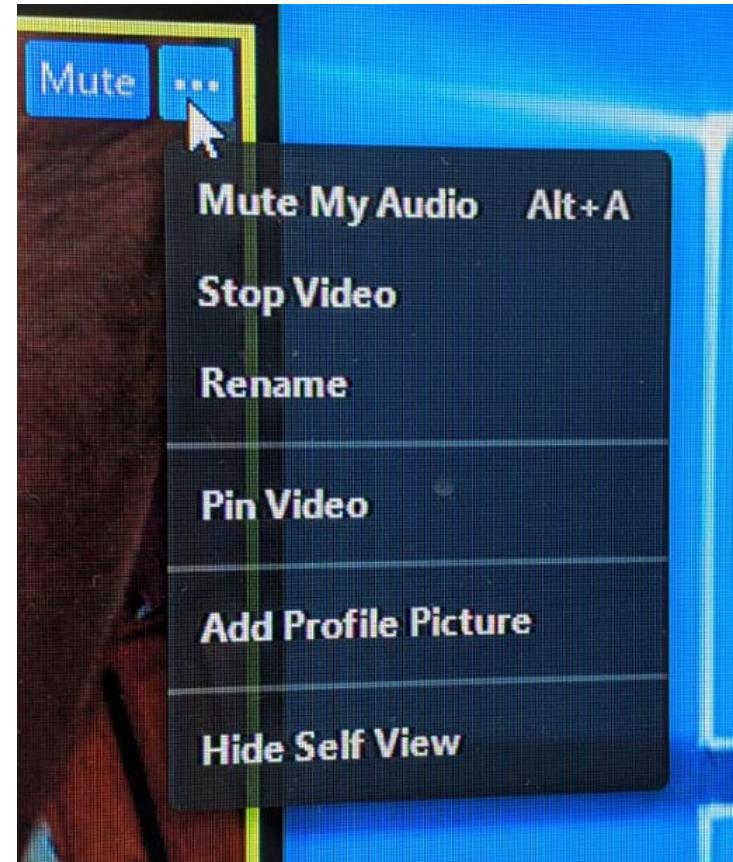
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# Add PC/MAC to Your Zoom Name

In order to direct you to the proper room—Mac or Windows—please change your name to include what version of NVivo you will be using:

Example:  
Amir-Windows  
Jeremy-Mac



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# What is NVivo?

NVivo is computer-assisted qualitative data analysis software (CAQDAS)

“that helps you easily organize and analyze unstructured information, so that you can ultimately make better decisions”

Source: QSR International

...and/or achieve better research outcomes!



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# Stages of a research project in NVivo

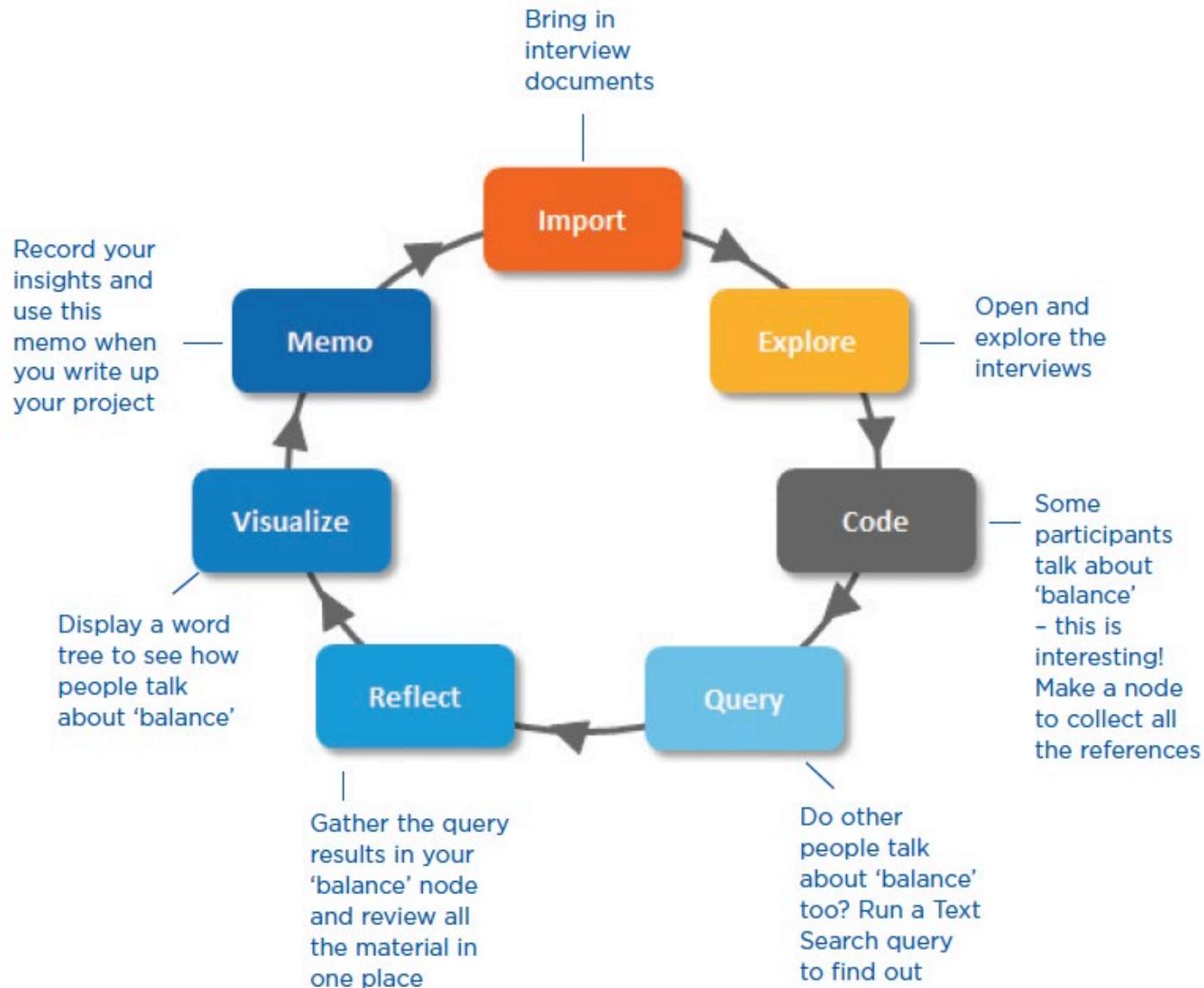
Stage	Processes
Literature Review	Collecting relationships, themes, findings and gaps
Research Design	Creating models Build audit trail
Data collection and analysis	Bringing together similar data (demographics, themes, concepts) Inductive / deductive Explore data (queries) Linking data
Writing	Keeping track of ideas Visualizing Reporting

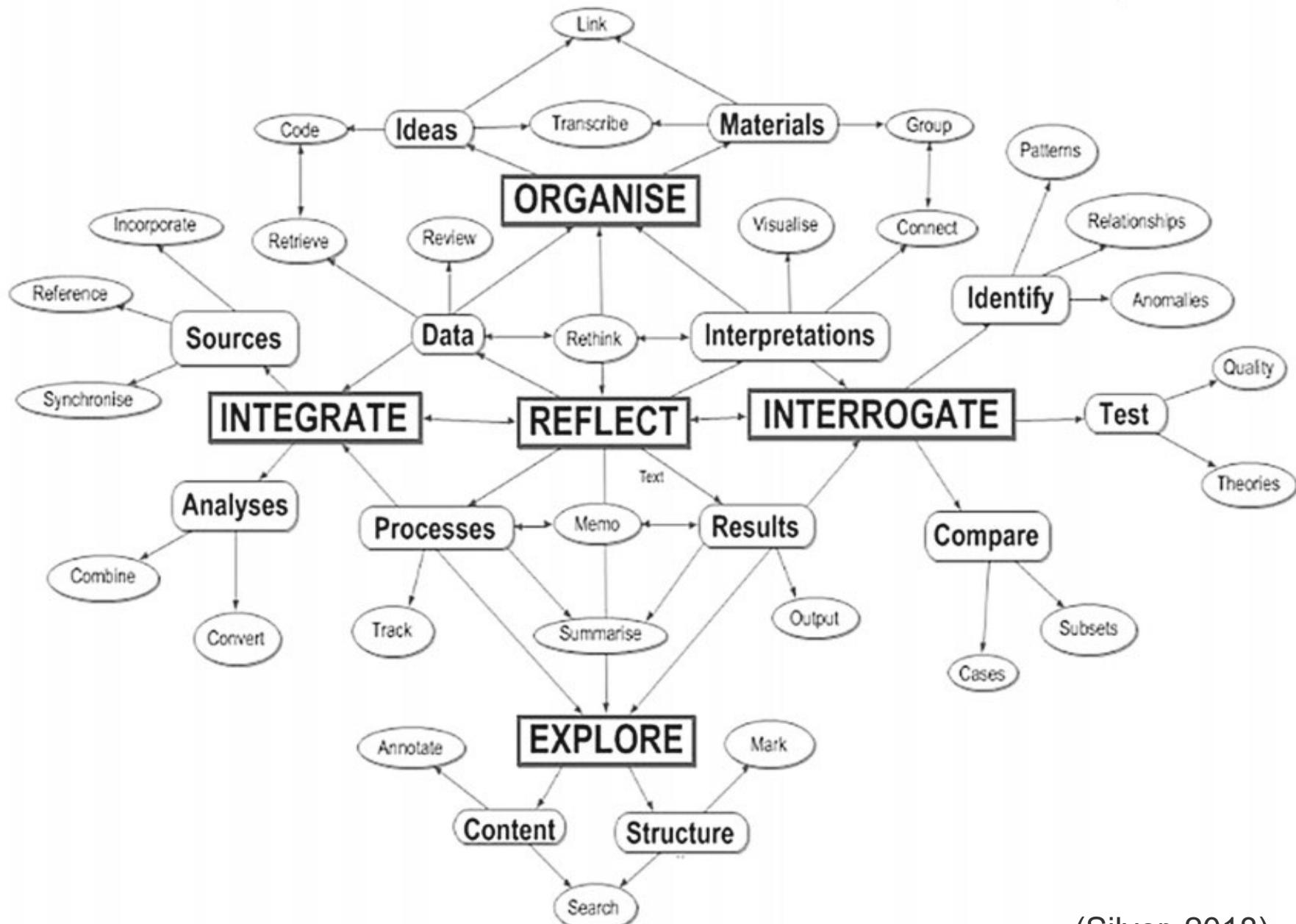




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# How do I approach my research project?





(Silver, 2018)

**Fig. 3.** Common analytic activities supported by dedicated CAQDAS packages [6]

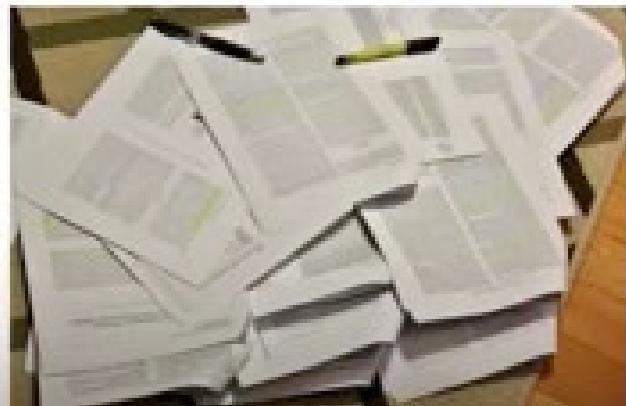


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# Organizing Qualitative Data

From this.....



To this:



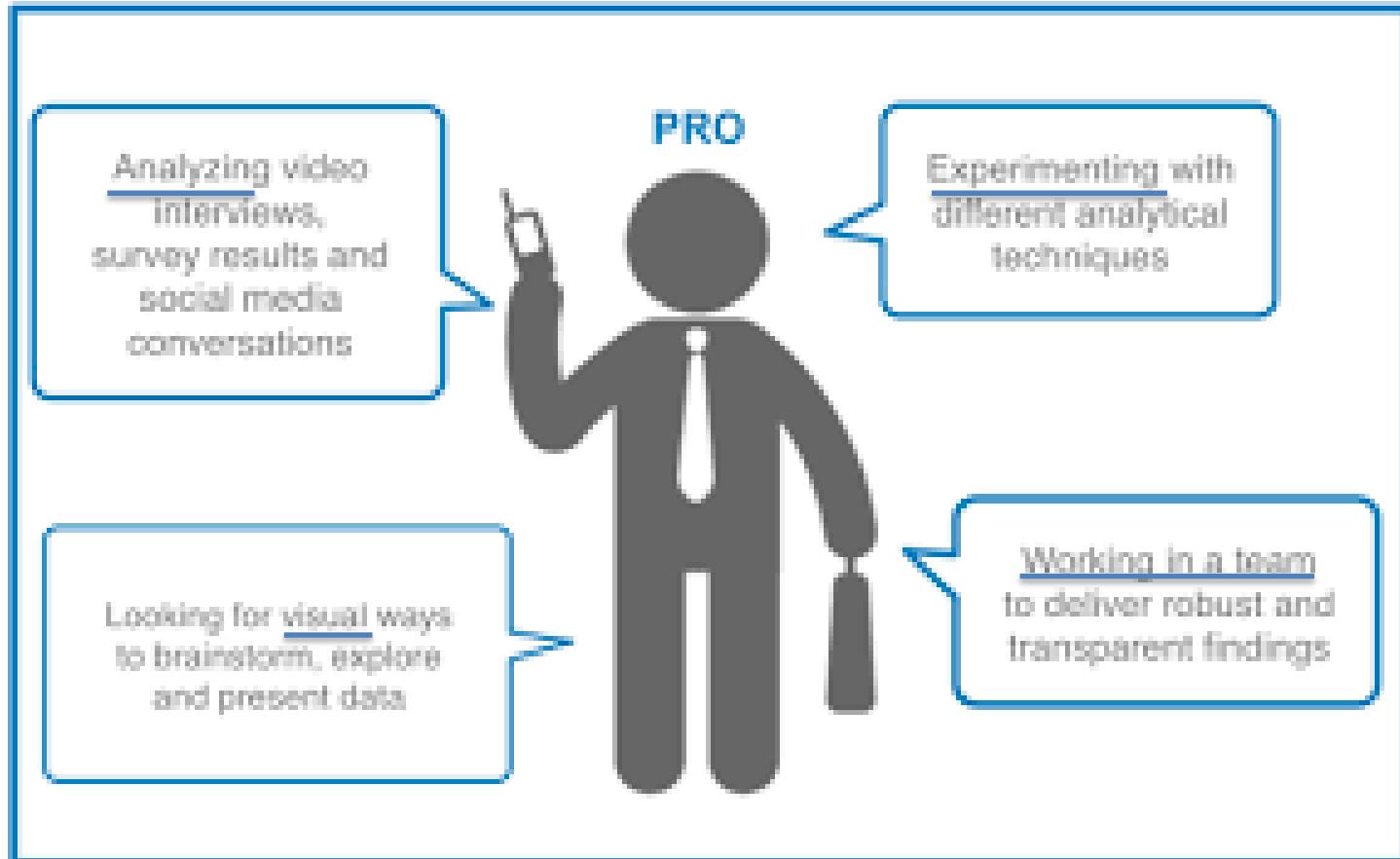
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# Benefits

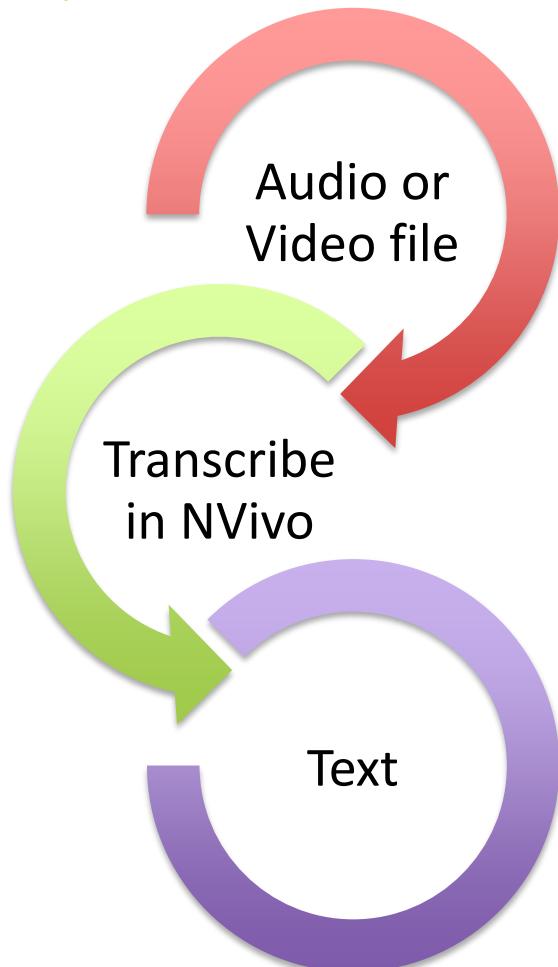


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Click to edit

	Timespan	Content
1	0:00.1 - 0:2.9	What are your favorite places?
2	0:02.9 - 0:13.3	Down East? I'd say [Cedar Island] of course. That's where I always grew up, and that's where I live at. That...
3	0:13.3 - 0:15.3	Home
4	0:15.3 - 0:17.2	Home. It's my home. I've been here all my life.
5	0:17.2 - 0:23.9	This area...this particular spot in particular? This is a nice spot. It'd be easy to see...
6	0:23.9 - 0:32.3	Like I say, got a good access to the water, luckily--cause passed down from our family.



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# Cautions

- NVivo can't tell you what to look at/analyze!
- PC and Mac are becoming more similar, but PC still has more features than Mac version
- Proprietary software (if you're thinking about the future)



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# General: Software screenshot

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Sample Project.nvp - NVivo 12 Pro

File Home Import Create Explore Share ? - X

Cut Copy Paste Merge Clipboard Add To Set Create As Code Create As Cases Query Visualize Code Auto Range Uncode Case Classification File Classification Detail View Sort By Undock Navigation View List View Find Workspace

Quick Access Search Project Interviews

Name	Codes	References
Barbara	43	197
Betty and Paul	13	41
Charles	38	134
Dorothy	39	128
Helen	14	50
Ken	17	56
Margaret	35	78
Maria and Daniel	43	150
Mary and James	42	111
Richard and Patricia	35	101
Robert	31	96
Susan	47	146
Thomas	28	112
William	47	106

Data

- Files
- Memos
- Nodes
- Area and Township
- Interviews
- Literature
- News Articles
- Social Media
- Survey
- File Classifications
- Externals

Codes

- Nodes
- Relationships
- Relationship Types

Cases

Notes

Search

Maps

Output

List view

Detail view

Barbara

Click to edit

Interview with Barbara on February 19<sup>th</sup>, 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 although I've moved away.

**Henry**

*And you've lived Down East how long?*

**Barbara**

Since '96. My husband and I bought this little cottage in '96.

**Henry**

*And have you lived here full time or part time? seasonal?*

**Barbara**

It's part time. It was full time, but then in 2000 he got a job up North. And so since then we've

Navigation view

In Nodes Code At Enter node name (CTRL+Q)

JAB 14 Items



# Task 1

- Open NVivo.
- Open a new blank project: Give it a name and a description.
- Import the interview with Barbara.

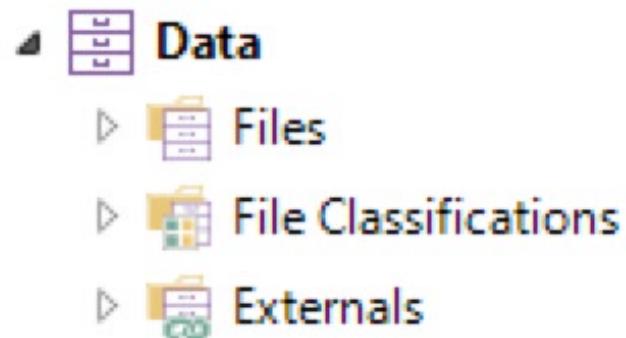


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# DATA

- Files
- File Classifications
- Externals





# Files

- Supports file types
  - Audio (.mp3, .m4a, .wma, .wav)
  - Video (.MPEG, .mp4, .avi, .wmv, .mov, *etc.*)
  - Pictures (.bmp, .gif, .jpg, .png, .tiff)
  - Documents (.docx, .doc, .rtf, .txt)
  - Datasets (.xlsx, .xls, .txt, SurveyMonkey, Qualtrics)
  - PDFs (Smart PDFs are best, though!)
  - Information from websites/social media (via NCapture)



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# Files Classifications

- File classifications also allow you to capture general information about your files—for example, interview date and location.
- If you conduct a literature review, you can import the literature references into NVivo—the bibliographical data is stored using 'file classifications'.



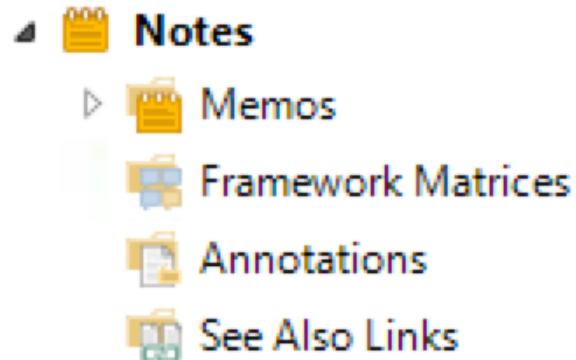
# Externals

- Externals are ‘proxies’ for the material you cannot import into NVivo
  - Books
  - Physical artifacts
- Externals appear as documents with a content summary of the original source

# Notes

## What can you do with them?

- Memos
- Framework Matrices
- Annotations
- See Also Links





# Memos

Memos are like documents and they can be linked to sources or nodes.

- Tell the story of your project
- Talk to yourself as you make sense of your data
- Track your analytical process



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# Task 2

- Open Barbara's transcript:
  - annotate
- Reflect on the annotation process in a memo



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# Coding

- What do you think coding is?
  - What is it useful for?
  - When do you think having a predefined idea of your coding strategy is useful?
  - When do you think that having an emergent approach is more useful?

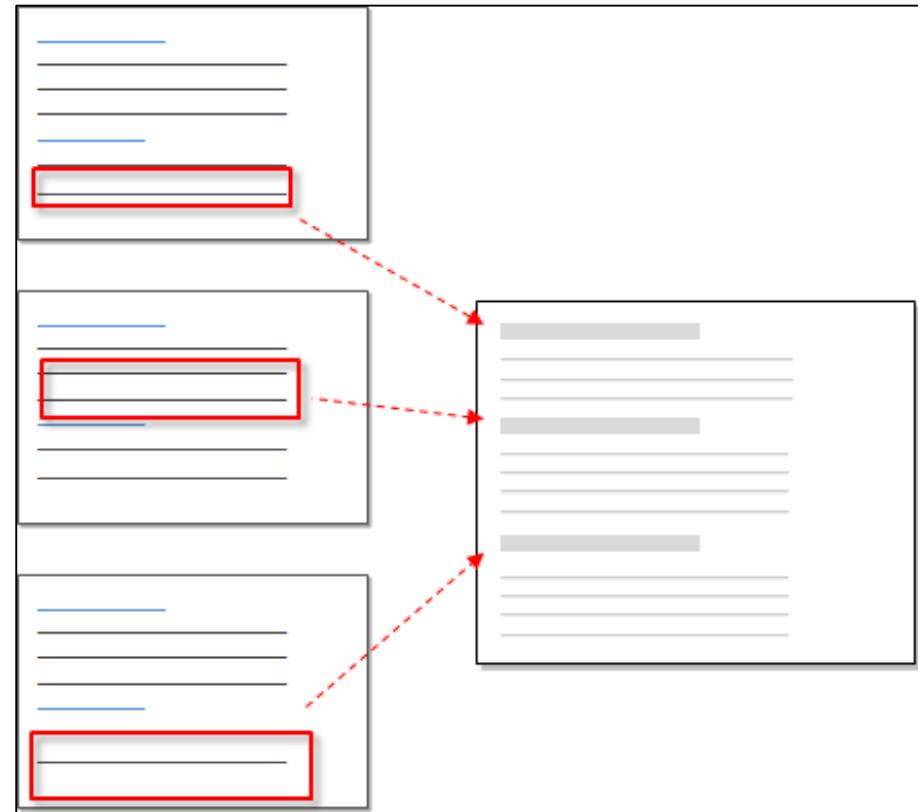


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# Coding

'Coding' your sources is a way of gathering all the references to a specific topic, theme, person or other entity. You can code all types of sources and bring the references together in a single 'node'



Source: QSR International



# Coding

- Definition: *A code in qualitative inquiry is most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a position of language-based or visual data.* (Saldaña, 2016)
- **Connecting** as well as **categorizing** strategies (Maxwell & Miller, 2008).
- It can be done in **cycles** – First(s) & Second(s).
- *in vivo coding, emotion coding, values coding, etc.*
- You can create **sub-codes**
- You can apply **multiple codes** for a given segment.
- You can visualize connections between codes (e.g., causation): **relationships or maps.**
- You can (or must) write **memos** as you annotate and/or code.
- Your RQs are your guides.



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# Useful, meaningful codes, will have:

- A **label** (i.e., name)
- A **definition** of what the code concerns (i.e., the characteristic or issue constituting the code)
- A **description** of how to know when the code occur.
- A description of any **qualifications or exclusions** to the identification of the code.
- **Examples**, both positive and negative, to eliminate possible confusion when looking for the code.

(Boyatzis, 1998, p.31)

# Examples of categories

- **Actions** – things that are done at a point in time (e.g., **Argue, Cheer, Laugh, Listen**).
- **Activities** – ongoing actions (e.g., **Aging, Learning, Raising children, Supervising**).
- **Beliefs, ideological positions, frameworks** – intellectual positions (or discourses) which are evident in thinking and action (e.g., **Honesty, Independence, Reason, Spirituality**).
- **Context** – the settings in which actions, events, etc. occur (e.g., **Adolescence, Downtown, School, Work**).
- **Culture** – social behaviours and norms that are likely to have multiple sub-branches, depending on the type of culture (e.g., **Art, Careers, Kinship, Technology**).
- **Emotions** – feelings (e.g., **Anticipation, Gratitude, Joy, Sorrow**).
- **Events** – highly structured actions or rituals (e.g., **Birthday parties, Recitals, Weddings, Vacations**).
- **Issues** – matters raised about which there might be some debate (e.g., **Control, Ownership, Privacy, Transparency**).



# Examples of categories

- **Narrative** –narrative features (e.g., **Contradictions, Omissions, Pronouns, Repairs**).
- **People (or actors or entities)** that are referred to or talked about – the locus or target of a comment, either specifically (e.g., **Dr. Almos** or **My boss**) or generally (e.g., **Employees, Managers, Nurses, The industry**).
- **Valences** (also sometimes called **sentiments** or **attitudes**) – the participant's **implicit or explicit response to a topic** (e.g., a participant says or implies they are **Conflicted, Negative, Positive, or Uncertain** about an event or action; or identify it as a **Barrier** or **Facilitator to success**).
- **Strategies** – a purposeful activity to achieve a goal or deal with an issue (e.g., **Making amends, Negotiating, Planning, Raising money**).

## Rules for categorization:

1. Each category or concept or theme (i.e., each Node) should **appear in only one place** in the coding system.
2. Keep **Attribute data that apply to whole Cases** (such as Age or Ethnicity) **separate** from the coding system (see Chapters 2 and 5).

(Jackson & Bazeley, 2019)



# How much is enough?

- If only a few changes and adjustments need to be made – that is, you mostly apply already existing tags, no new properties are emerging and the existing ones are filling with content – you approach **theoretical saturation**.

(Friese et al., 2016)

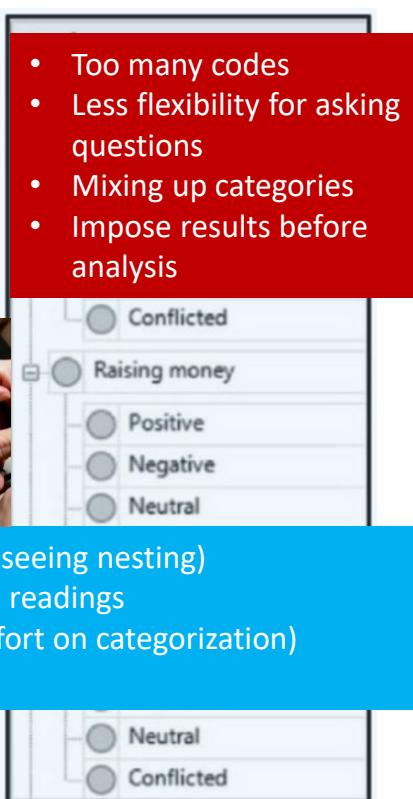
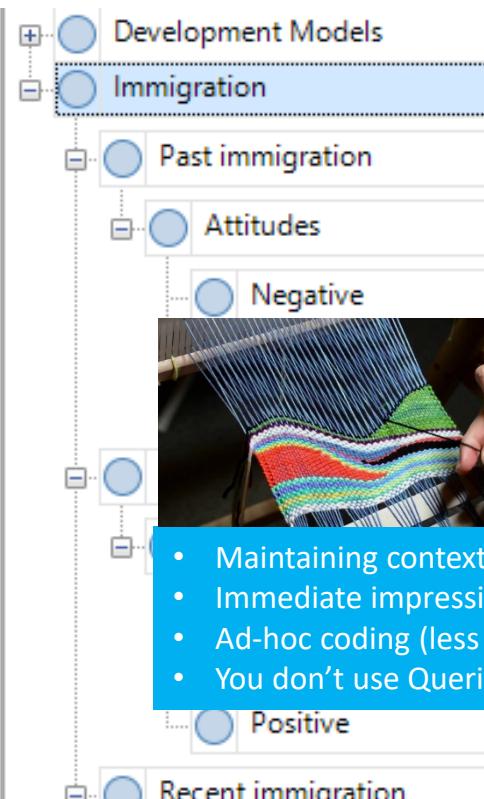


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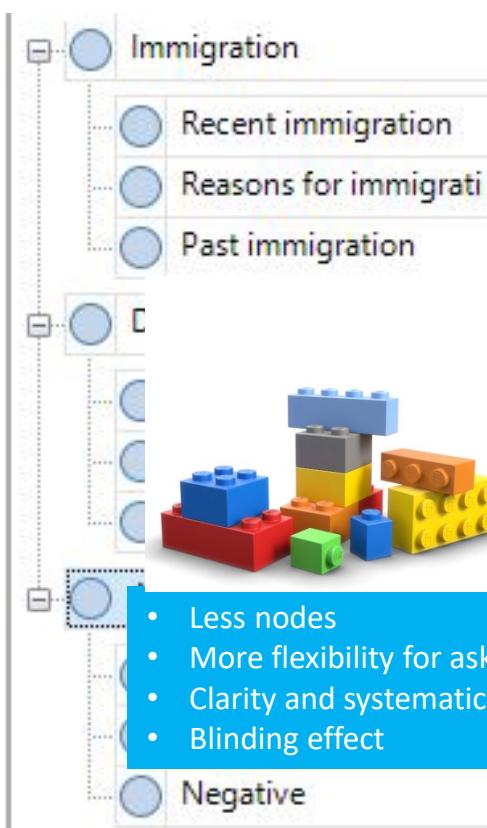
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# Nodes in NVivo

- Mixing ‘families’ / Viral coding



- Separating ‘families’ (children types of parents) / Vista coding



- Time consuming
- Necessitates remembering all the codes you need to apply
- Keep track of possible queries in Memos.
- Thorough definition of categories

- Less nodes
- More flexibility for asking questions (not foreseen)
- Clarity and systematicity
- Blinding effect



# Task 3

- Code sections of the interview with Barbara.
- Link a node to a memo.
- Explore multiple technical ways of coding.
- Open Sample project.
- Explore the codes and their structure.
- Aggregate / disaggregate



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# Query

- What do you think a query is?
- What is it for?



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# What is a query?

- ✓ Find and analyze words or phrases in your sources, annotations and nodes
- ✓ Ask questions and find patterns based on your coding and check for coding consistency among team members
- ✓ Code and/or visualize the results

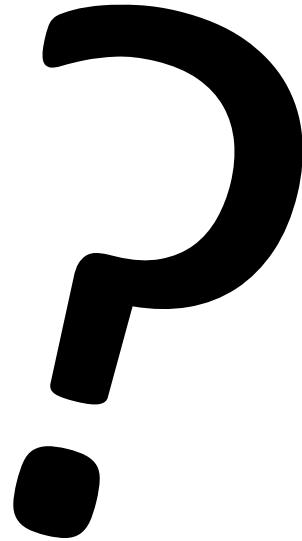
Source: QSR International



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# Queries we will cover today

- Text search & word frequency
- Matrix
- Crosstab
- Coding
- Interrater agreement(?)



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# Task 4

- Run frequency queries
- Create a word cloud (explore some of the words inside)
- Save the query
- Run text search queries (based upon the frequency query)
- Create nodes from your queries

# Need Help?

## Resources & Consultations

[researchcommons.library.ubc.ca](http://researchcommons.library.ubc.ca)



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## Workshops

[elred.library.ubc.ca/libs](http://elred.library.ubc.ca/libs)



UBCResearchCommons

## Email

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