Course title
SA107. Introduction to NVivo 10 for Windows

Instructor details
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Short Bio
Marie-Hélène Paré is a lecturer in program evaluation in social work at the Open University of Catalonia, and an international consultant in qualitative data analysis. She was educated in Quebec, Beirut and Oxford. She is a registered social worker who worked and conducted research in violence against women and community participation in disaster mental health. She taught social work at St-Joseph University in Beirut, Lebanon, and has lectured on qualitative analysis in more than forty universities and research centres worldwide. Her methodological interests lie in qualitative analysis, qualitative evidence synthesis, indigenous epistemologies, and participatory methodologies. Since 2009, she teaches the introductory and advanced courses on qualitative data analysis at the ECPR Summer and Winter Schools. She is an expert trainer in NVivo software for qualitative analysis.

Prerequisite knowledge
This is an introductory course on NVivo with no prerequisite knowledge. Knowledge of qualitative research is necessary.

This course uses NVivo 10 for Windows

Participants should bring their own laptop with NVivo 10 for Windows installed to the course. The NVivo 30-day free trial for Windows can be downloaded here.

Mac users
If you are a Mac user, do not come to the course with NVivo for Mac installed on your Mac laptop. The NVivo for Mac is incomplete compared to the Windows version. To use NVivo 10 for Windows on your Mac, see the compatibility options here. It is your responsibility to ensure that NVivo 10 works well on your machine. No troubleshooting will be provided during or outside teaching hours.

Short course outline
This course is designed for participants who plan NVivo for the management, coding, analysis and visualisation of qualitative data. The course’s content is spread over four modules and includes: formatting text data and downloading internet data, setting up a project and organising data in NVivo; coding and analysing data; seeking patterns and identifying relationships, and presenting findings using graphic displays. The course is entirely hands-on and uses sample data to learn NVivo’s basics and advanced options. This course does not cover how to analyse qualitative data in NVivo based on specific methods such as thematic analysis, grounded theory, or content analysis. If you are looking for such course, see the outline of the course Advanced Qualitative Data Analysis of the next ECPR Winter School in Bamberg in February 2016.
**Long course outline**

NVivo is a software programme for qualitative data analysis. It is a powerful platform that supports text, video, audio, picture data, PDF, surveys, bibliographic libraries from Endnote and the like, internet data from Facebook, Twitter, LinkedIn, YouTube and Survey Monkey, and notes taken using Evernote and OneNote. NVivo supports a range of inductive and deductive methods to analyse qualitative data such as thematic and content analysis, within and cross-case analysis, discourse, conversational and narrative analysis, grounded theory, analytical induction, and qualitative research synthesis. The objective of this course is to provide participants with knowledge and skills on how to use the basic and advanced features of NVivo in their own research project. This includes formatting text data and downloading internet data, setting up a project and organising data in NVivo; coding and analysing data; seeking patterns and identifying relationships, and presenting findings using graphic displays. These topics are detailed below.

This course follows the logical steps of a qualitative data analysis process, starting with preparing data outside NVivo and then moving into the software for analysing data.

**Module 1: Data Management**

The course opens with guidelines on how to format structured and semi-structured interview transcripts in Word and attributes data in Excel. We then create an NVivo project, import and organise a range of qualitative data: interview and focus group transcripts, audio and video recordings, PDF from literature review, survey data, Tweets and Facebook posts, and bibliographical meta-data. When then learn how to cross-reference PDFs of a literature review to link a line of arguments that runs across sources. Our attention then turns to the transcribing possibilities of NVivo, starting with transcribing audio and video recordings in-full or working only with sections of sound data. We look at picture data and explore the possibility to comment on a whole picture or only regions of it. Module 1 concludes with creating externals which link an NVivo project to websites, and the creation of memos to record the steps of a qualitative analysis process.

**Module 2: Data Coding**

Module 2 presents the different techniques to automatically and manually code text and multimedia data. We first start by autocoding interview transcripts so that all responses of each question are gathered in one node. Such broad-brush coding is very useful when one wants to examine everything that has been said about a question or a theme and so, across all the data. We then move on to creating inductive codes that capture the emerging topics in the data. After spending some time coding text data, we look at coding video transcripts, sequences of audio files, and regions of pictures. The use of relationship nodes, where connections between codes are stated, is demonstrated for hypothesis generation and hypothesis verification. Module 2 concludes with mapping the coding process in models and using graphs to find out what node or source is coded where in the data.
Module 3: Data Analysis

Module 3 looks at data analysis. It provides an overview of the different tools one can use to interrogate text, coded, and attribute data. First, we set up the case and variable structure to prepare the cross-case analysis. We then consider the use of sets to group items together for admin, comparative, or theoretical purpose. We proceed with running word frequency query which creates a dictionary-type output of the most cited words in the data. We view the results in tag cloud and dendogram. We further run text search query of key words and expressions, and analyse the results in the original context as well as in Wordtree.

We move on using coding-based queries which look at coding co-occurrence based on proximity, inclusion or exclusion patterns. We learn to write syntax command to find out content coded at some nodes but only when mentioned by respondents who match specific sociodemographic criteria. We interpret the results using coding references and matrix tables. We run matrix coding query to see how cases compare across key nodes based on coding density and scope. Module 3 concludes with running group query to find out association between items across the data. Results are interpreted in memos and linked back to theory.

Module 4: Data Visualisation

Module 4 proposes different graphic displays to effectively communicate one’s research findings. We first discuss the rationales for choosing certain displays against others. We learn how to generate models, charts, graphs, dendogramme, and maps. Moving on to building a solid audit trail to back up results and substantiate one’s claims, we learn how to export results out of NVivo to use these in Word and Excel files, PowerPoint presentations and the like. The usefulness of generating nodes summary reports, which provide a detailed synthesis of the scope of a node in a project, is also covered. When working with colleagues who don’t have or use NVivo, the possibility to export project data in mini websites using HTML files is presented. Module 4 concludes with the ABC of coordinating team work with a particular emphasis on the golden rules for successful data management, splitting and merging project files in a master project, and the measurement of intercoder reliability.
### Day-to-day schedule (Thursday 23 July – Saturday 25 July)

<table>
<thead>
<tr>
<th>Topic(s)</th>
<th>Details</th>
</tr>
</thead>
</table>
| **Day 1**                    | **Data management**<br>Data coding                                                                                                     | 1. Format interviews and FGs in Word  
2. Prepare attributes in Excel  
3. Set up a project and organise data  
4. Cross-reference sources during lit review  
5. Link a project to external information  
6. Record the analytic process in memos |
| **Day 2**                    | **Data coding**<br>Data analysis                                                                                                        | 1. Autocode structured data  
2. Create codes inductively  
3. Manage a coding scheme  
4. Connect nodes using relationship nodes  
5. Create case list  
6. Assign attribute data to cases |
| **Day 3**                    | **Data analysis**<br>Data visualisation                                                                                                 | 1. Search and group items  
2. Run lexical, coding and matrix queries  
3. Present findings with visualisations  
4. Generate node summary reports  
5. Export content out of NVivo  
6. Coordinate team work |

### Day-to-day reading list

It is highly recommend that you purchase the book by Bazeley & Jackson (2013). *Qualitative Data Analysis with NVivo* (2nd ed.) as it is the core reading text of the course.

<table>
<thead>
<tr>
<th>Readings</th>
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</table>
| **Day 1**         | **Data Management**<br>1. Format interview and FG data: chapter 3 pp. 59-61  
2. Download data from internet: chapter 7 pp. 173-177  
3. Set up a project and organise data: chapter 2 pp. 24-34; 45-46; chapter 3 internals pp. 61-67; chapter 9 survey pp. 195-204; social media pp. 209-216; chapter 11 framework matrices pp. 259-260  
4. Transcribe multimedia data: chapter 3 pp. 56-59; chapter 7 pp. 154-177  
5. Link to external data and memos: chapter 2 pp. 36-38; chapter 3 pp. internals 62-63; chapter 4 p. 87  
6. Import literature review sources: chapter 8 pp. 178-194 |
| **Day 2**         | **Data Coding**<br>1. Autocode structured data: chapter 5 pp. 108-110; chapter 9 survey : 207-208  
2. Create codes and coding: chapter 4 pp. 68-94  
3. Manage a coding scheme: chapter 5 pp. 95-106; 117-119  
5. Insert annotations and link data: chapter 2 pp. 34-45  
6. Create case nodes and classifications: chapter 3 pp. 47-56; chapter 6 pp. 122-139; chapter 9 survey : 204-207 |
| **Day 3**         | **Data Analysis**<br>1. Search and group items: chapter 5 pp. 106-107; chapter 6 sets pp. 146-153  
2. Run lexical, coding and matrix queries: chapter 5 word frequency / text search pp. 110-117; chapter 6 matrix query pp. 141-146; chapter 11 pp. 242-259; 260-265 |
Data Visualisation
2. Generate reports: chapter 11 pp. 265-269
3. Export content out of NVivo: chapter 5 pp. 119-121; chapter 6 pp. 139-140
4. Coordinate team work: chapter 12 pp. 270-296

Software and hardware requirements

This course requires that you have **NVivo 10 for Windows** installed on your laptop. If your department or university did not purchase NVivo licenses, you must download the NVivo 10 for Windows 30-day free trial here for the course. Do not come to the course with **NVivo for Mac** installed on your Mac laptop. The NVivo for Mac is incomplete compared to the Windows version (see comparison table here) and has a different interface and dialog boxes. Consequently, both versions are never taught in a same class. If you wish to use NVivo for Windows on your Mac, see the compatibility options here.

Once NVivo is installed on your laptop, you must create a test project to ensure that the software works properly. Follow the instructions below.

1. On your Desktop, launch NVivo by clicking on the **NVivo 10 shortcut icon**.

   ![NVivo 10 shortcut icon](image)

2. In the Welcome interface, below the Get Started heading, click **New Project**.

   ![Welcome interface with New Project button](image)

3. This will take you to the NVivo interface. If you get here, this means that NVivo is properly installed on your laptop. No further action is required. Close NVivo.

   ![NVivo interface](image)
4. If you don’t get to the NVivo interface or if the OK button is greyed out at the stage of creating a test project, uninstall NVivo from your computer and reinstall it a second time.

5. If, after a second installation, you still can’t create a test project you must contact QSR International helpdesk to find out what the problem is.

6. To contact QSR, submit a support request form online (see section Contact us online at the bottom) to resolve the issue. QSR has a 24-hour email policy return so you will hear from them soon.

7. It is your responsibility to ensure that NVivo runs properly and is installed on time for the course.

Additional Literature


## NVivo videos on YouTube

<table>
<thead>
<tr>
<th>General videos</th>
<th>‘How to’ video</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="#">NVivo 10 Tutorial: Get up and running with NVivo 10</a></td>
<td>Importing a document</td>
</tr>
<tr>
<td>What’s new in NVivo 10</td>
<td>Create a new project</td>
</tr>
<tr>
<td>Introducing NVivo 10 for Mac</td>
<td>Importing audio files</td>
</tr>
<tr>
<td>Introducing NVivo</td>
<td>Importing videos</td>
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<td></td>
<td>Importing images</td>
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<td>Importing PDFs</td>
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<td></td>
<td>Importing datasets</td>
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<td></td>
<td>Creating nodes</td>
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<tr>
<td>Literature review with NVivo</td>
<td>Coding a document</td>
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<tr>
<td><a href="#">NVivo and Endnote: improving your literature review</a></td>
<td>Coding an audio file</td>
</tr>
<tr>
<td>Literature review with NVivo</td>
<td>Coding a video</td>
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<td>Coding an image</td>
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<td>Coding PDFs</td>
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<td></td>
<td>Coding a dataset</td>
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<tr>
<td></td>
<td>Importing classifications and attributes</td>
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<tr>
<td>Tutorial videos</td>
<td>Creating nodes from sources</td>
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<tr>
<td><a href="#">Working with YouTube data</a></td>
<td>Classifying nodes</td>
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<tr>
<td><a href="#">Working with Twitter data</a></td>
<td>Matrix coding query</td>
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<tr>
<td><a href="#">Capturing web data in NVivo</a></td>
<td>Word frequency query</td>
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<tr>
<td><a href="#">Work with audio, video and images</a></td>
<td>Text search query</td>
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<tr>
<td><a href="#">Work with survey results</a></td>
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<tr>
<td><a href="#">Work with interviews, articles and other documents</a></td>
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<tr>
<td><a href="#">Organize material into themes with coding</a></td>
<td></td>
</tr>
<tr>
<td><a href="#">Work with information about people, places and other cases</a></td>
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<tr>
<td><a href="#">Explore your coding</a></td>
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<tr>
<td><a href="#">Find themes and analyze text</a></td>
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<tr>
<td><a href="#">Visualize your project</a></td>
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## Lab requirement

None - the class will not be held in a computer lab.