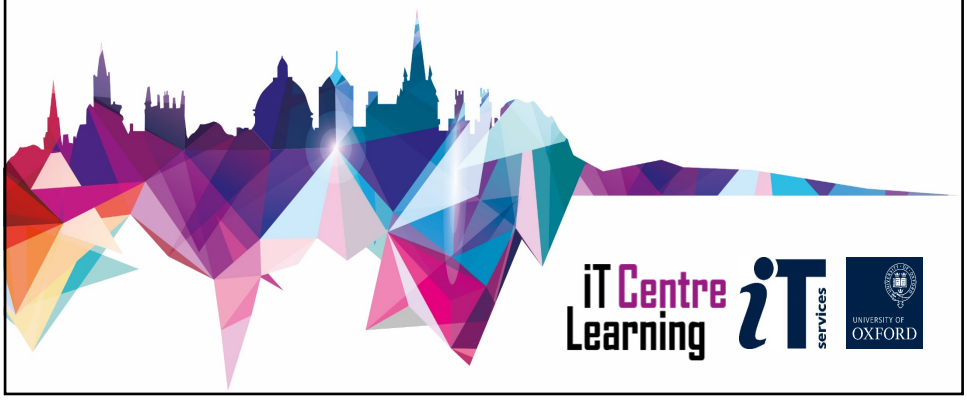
NVivo 12: Up and Running

Susila Davis, Charlotte Albury & Susan Divald

With many thanks to Zainab Kabba & Marie-Hélène Paré



OUTLINE OF THE DAY

- Group introduction and introduction to CAQDAS
- Exploring NVivo and learning the language
- Exercises on Data Management (12)
- Exercises on Data Coding and Analyses (12)

With two coffee breaks and lunch ☺

FIRST THINGS FIRST…

WELCOME!

Please be aware of:

Fire exits

Possible hazards:

Tripping over bags and coats, charger wires..

Please report any equipment faults to us

MORE THINGS FIRST…

The toilets are along the corridor outside the lecture rooms

The rest area is where you registered

The swivel seats in this room are adjustable

You can adjust the monitors for height, tilt and brightness

Let us know if you have any other concerns

PRACTICAL WORK

Exercises for you to practise today

Materials are all in the **ITLC Portfolio** for downloading

Group survey & Introductions

WHAT IS NVIVO?

NVivo is a Computer Assisted Qualitative Data Analysis (CAQDAS) software package.

Closeness to data – at least as much as can be had using manual methods – is assisted by enlarged and improved screen display, improved management of and access to multiple sources and types of data, rapid retrieval of coded text and easy ability to view retrieved segments of text in their original context. (Bazeley and Jackson, 2013).

Helps people *manage*, *shape* and *make sense* of unstructured information. It doesn't do the thinking for you; it provides a workspace and tools to enable you to easily work through your information.' (QSRinternational.com)

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WHAT IS NVIVO?

- Electronic Project
- It is methodologically AGNOSTIC
- Helps you to:
  - Organise your Data
  - Reflect on your Data
  - Explore your Data
  - Integrate your Data

Please have realistic expectations:

NVIVO WILL: help you to organise your data…

NVIVO WILL NOT: do the analysis and thinking for you

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NVIVO FOR MAC/PC

- If you hold a current NVivo 12 for Windows license key, you can download and use NVivo. However, if you hold an NVivo for Mac license key, you cannot use this license to install and use NVivo 12 for Windows.
- NVivo for Mac projects have a different file format from those created in NVivo 12 for Windows:

  NVivo 12 for Windows (.nvp) – e.g. MyProject.nvp
  NVivo for Mac (.nvpx) – e.g. MyProject.nvpx

With NVivo 10 for Windows Service Pack 5 or later, you can use the 'Copy Project' feature to convert your NVivo for Windows projects to NVivo for Mac projects.

The Windows-Mac Project Converter is downloaded and installed automatically the first time you do a project conversion to or from NVivo for Mac format. The download is approximately 185 MB and may take a few minutes depending on the speed of your internet connection.

http://www.qsrinternational.com/product/product-feature-comparison

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USING SOFTWARE: CAUTION…

Talk to one/two people near you and write down the different ways or reasons why you might need to be cautious when using software to analyse qualitative data in your field(s)

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TIPS FOR NVIVO USE

- Take some time to step away from the data.
- Save project files on your computer and a flash drive/secure hard drive.
- Try to work backwards from what you plan to achieve with your data analysis and research

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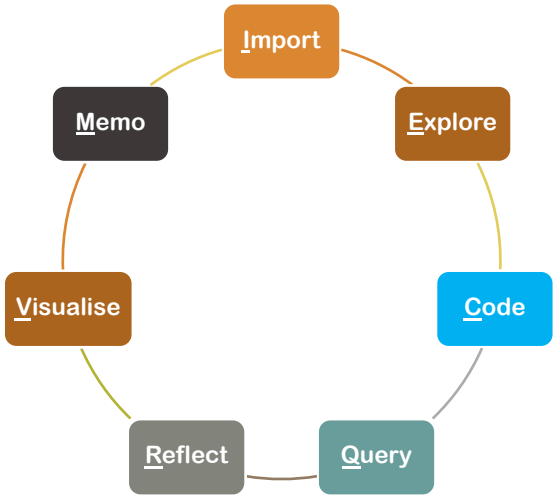
WORKING WITH QUALITATIVE DATA



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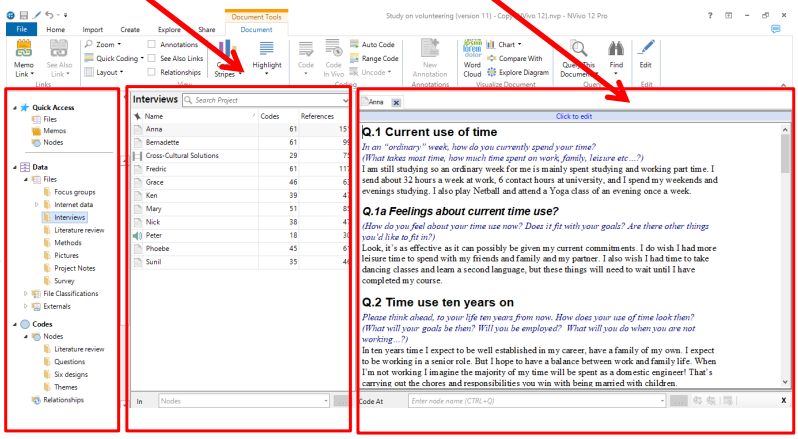
THE NVIVO WORKSPACE

List view: displays content of folders

Detail view: shows the sources

Navigation view



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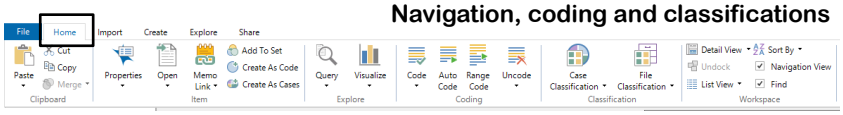
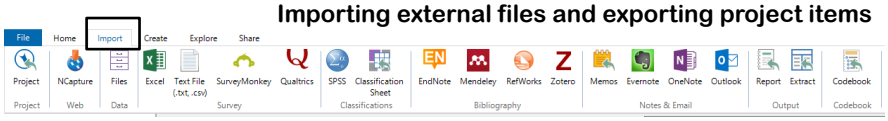
RIBBON TABS

Navigation, coding and classifications

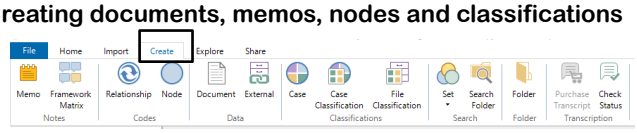


Importing external files and exporting project items

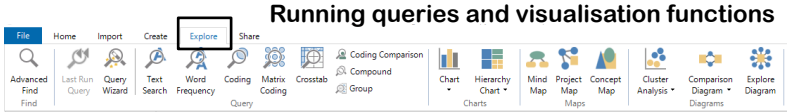


Top tip
If in doubt, right-click wherever you are, see available options!

Creating documents, memos, nodes and classifications



Running queries and visualisation functions



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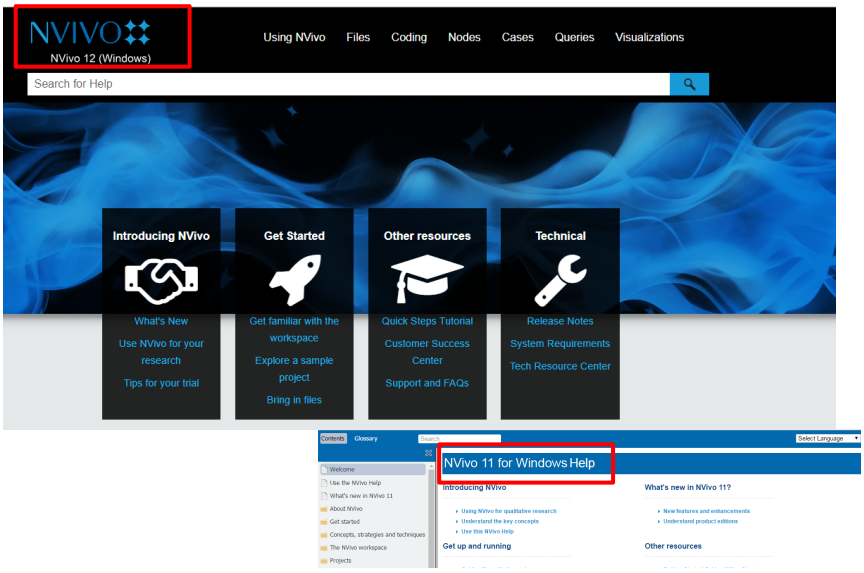
HELP SYSTEM



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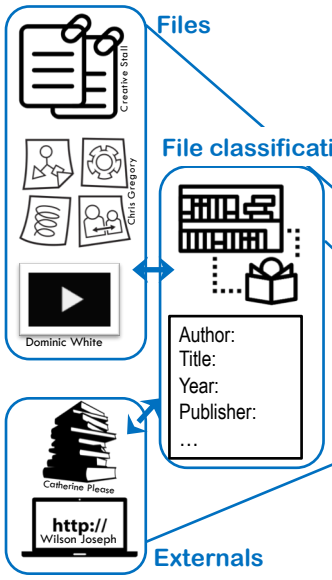
KEY ELEMENTS: DATA

Folders
Noun project: Carla Dias



'Data' is where many of the materials connected to your NVivo project will be stored. In **Data** you can store data in three types of folders: **Files, File Classifications, and Externals.**

1. **Files**: data you import or create in NVivo (eg. PDFs, transcripts, audio).
2. **File Classifications**: 'labels' with descriptive information assigned to Files (e.g. bibliographic information)
3. **Externals**: links to data you can't import in NVivo (eg. Websites, books).

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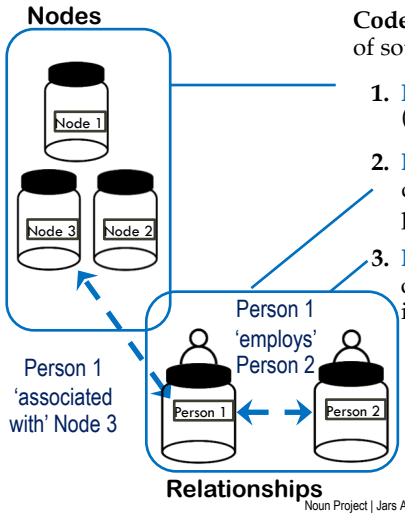
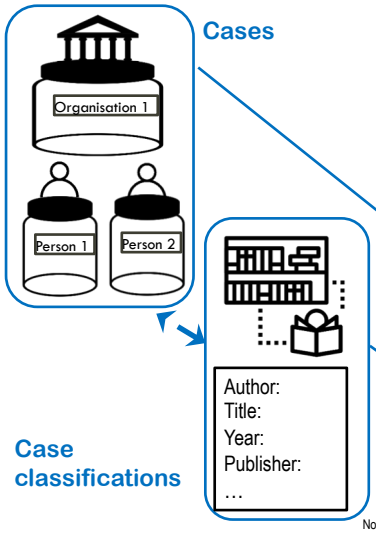
KEY ELEMENTS: CODES



Codes: '*containers*' in which wholes or parts of sources are kept for analysis.

1. **Nodes**: identified patterns & themes (according to data, lit. review)
2. **Relationships**: a type of code that defines the connection between two project items
3. **Relationship types**: Different kinds of connection available between project items

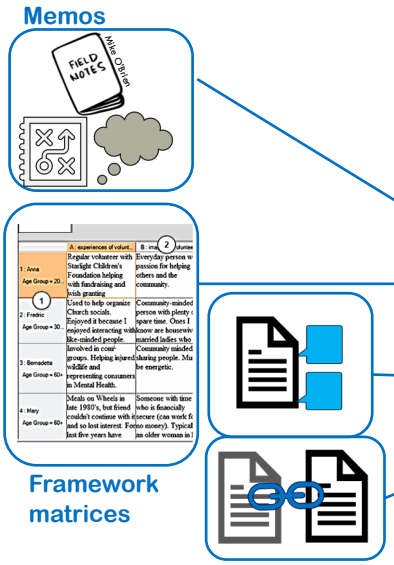
KEY ELEMENTS: CASES



'Cases' is where the units of analysis and their 'labels' connected to your NVivo project will be stored. In Cases you can store data in two types of folders: Cases, and Case Classifications.

1. **Cases**: units of analysis from the data (respondent, institution, country) that can be 'coded' to project items.
2. **Case Classifications**: 'labels' with descriptive information assigned to demographic, institutional, or geographical data about case nodes.

KEY ELEMENTS: NOTES



'Notes' is where you can store ideas you might have about your project, or things you might normally scribble in your fieldnotes. In **Notes** you can store data in four types of folders: **Memos**, **Framework Matrices**, **Annotations** and **See Also Links**.

1. **Memos:** notes and reflections about your project.
2. **Framework Matrices:** tables for summarizing data about ① cases and ② themes. Beware the word limit…
3. **Annotations**: notes about a specific section of a project item, phrase or marking content for follow-up.
4. **See Also Links**: marking if a project item or section of text might be related to another

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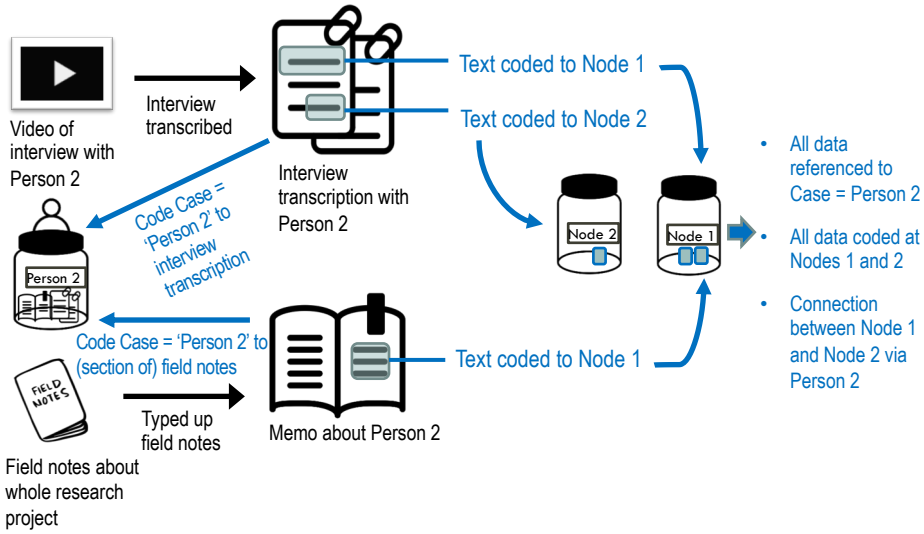
NVivo: What can I learn about Person 2?



- All data referenced to Case = Person 2
- All data coded at Nodes 1 and 2
- Connection between Node 1 and Node 2 via Person 2

Noun Project | Book - Alice Cerconi; Paper - Creative Stall

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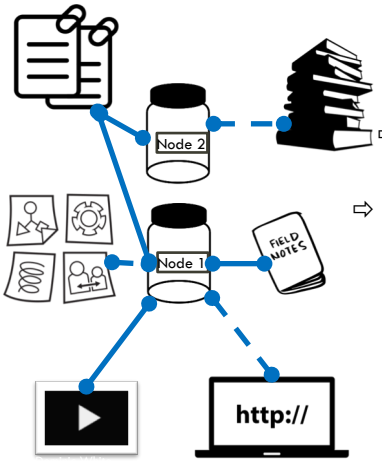
THINKING AHEAD



NVivo can help you to:

⇨ Manage your data & literature (to keep track of and store)

⇨ Manage your ideas and keep a journal of the research process

⇨ Ask interesting questions of your data

⇨ Visualise your data, concepts, relationships

⇨ Report from the data

Adapted from Bazeley and Jackson (2013: 3)

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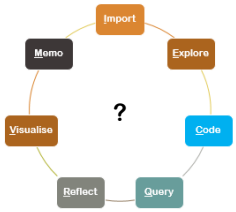
SESSION 1: DATA MANAGEMENT

To download NVivo onto your laptops, visit
https://register.it.ox.ac.uk/self/software

More info in User Guide 'Opening a new project', page 10

EXERCISE 1: Create an NVivo Project



Task 1: Create a new Project

i. Open NVivo and click on the 'Blank Project' button.

ii. Leave the 'Write user actions to project event log' box unchecked.

iii. Name your project, eg. Volunteering.

Task 2: Review the NVivo Workspace

i. Locate the Navigation view sidebar section.

ii. Click on different sections.

iii. Review the changes in the list view of the workspace.

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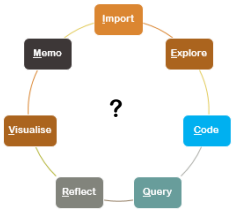
More info in User Guide 'Importing reference libraries', page 33

EXERCISE 2: Import Reference Library



Task 1: Export reference library as .xml file

i. Open EndNote library file (Volunteering.enl)

ii. Select all 15 references.

iii. Export these file end note in .xml format.

File > Export > Save as type .xml > Save > Close Endnote

Task 2: Import reference library

i. Create a new folder in the **Data > Files** section, name it **Literature Review**.

ii. **Import** tab **> Endnote** > Locate and select the .xml file you saved earlier.

iii. Name sources by > **Author and Year**

iv. In section **Create Files in** > select folder (Literature Review) in **Files** folder.

v. In **Files,** view the contents of your **Literature Review** folder.

vi. In **File Classifications**, view the **References** folder that was created.

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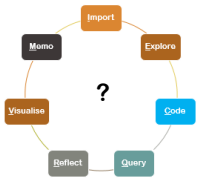
More info in User Guide 'Getting your research into NVivo', pages 15-17

EXERCISE 3a: Import Documents



Task 1: Import Interviews

i. Create a new folder in **Files**, name it **Interviews**.

ii. Click on the **Import** tab > click **Files** > Locate the 9 files.

iii. Don't select the document 'Transcript Cross Cultural Solutions'.

Task 2: Import Focus Group data

i. Repeat the steps above for a **Focus Group folder**.

ii. Select the 3 files: Non-Volunteers, Volunteer 01, and Volunteers 02.

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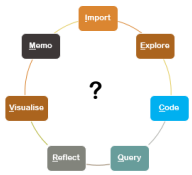
More info in User Guide 'Organising your data using nodes', page 22-23; 32

EXERCISE 3b: Coding & Annotating



Exploring what you've just imported

i. Go into one of your **Interview Files** – e.g. **Anna**. Have a look at the interview. What structural features do you notice about that File – how are the questions and responses arranged and formatted?

ii. What kinds of nodes can you create by *inductively* coding your Interview File? Highlight the text you want to code, right-click and select **Code > New Node.** Type a name for that node that reflects what you have highlighted. Click on **OK**. Open the Node you've just created and explore its content.

iii. Next, highlight some text that you're not sure how to code yet, right-click, and select **New Annotation**. Write some text to reflect ideas you might have for a future node you might create later. (**Annotations** are equivalent to Comments in Word or PDF documents)

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More info in User Guide 'Getting your research into NVivo', page 16

EXERCISE 4: Import Internet Data

- Internet data from web pages, Facebook, Twitter, LinkedIn and YouTube can be imported into NVivo.
- **NCapture** is the web browser extension that **downloads internet data** with IE or Google Chrome.

Task 1: Enable NCapture in the web browser

i. Open Google Chrome. Look for the NCapture ( ) icon on the top right of the address bar.
ii. If the **NCapture** icon in not visible , go to Extensions to enable it.

Task 2: Download web page

i. Go to www.unv.org.
ii. Click the NCapture icon > **Capture Web Page as PDF.**

Task 3: Import web pages

i. Create a folder in **Files** for Internet Data > on the **Import** tab click **NCapture**.
ii. Locate the folder where the NCapture download (*.nvcx) file is saved > click **Import**
iii. View files in the **Files** folder.

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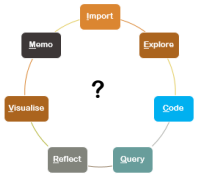
More info in User Guide 'Getting your research into NVivo', pages 16-17

EXERCISE 5: Link to External Files



- Externals are Files that represent other materials which can't be imported into NVivo.

Create an external about a conference on volunteering

i. In **Files** > right click on the **Externals** folder > **New Folder** > name it Conferences
ii. In List View > right click > **New External** > name it Volunteering and Service
iii. Click the **External** tab > Type (web link) > paste the address: www.volunteeringandservice.org
iv. Review the link in the **Externals** folder.

RUN A QUICK QUERY

i. In the **Explore** tab > **Text search** > Insert text, e.g. '**volunteer**' > **Run**.
ii. Review results in Detail View; the Word Tree Tab. Are you getting results you would expect?

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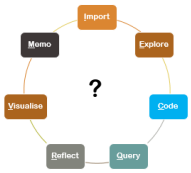
More info in User Guide 'Links: Memos, Annotations …', pages 31-33

EXERCISE 6: Annotate Lit. Review



Comments are called **annotations** in NVivo.

Task 1: Make comments on your literature sources

i. Open the article Manning et al., 2010.

ii. On Page 129, 3rd paragraph, starting at: "A key finding…." the authors suggest detangling concepts of religious participation and religious affiliation from volunteering.

iii. Annotate: Select the text **>** Click on **PDF** tab **> New Annotation**

iv. View your annotation in the **Notes** section.

v. Repeat the task with another article from the Literature Review folder.

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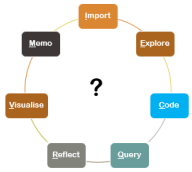
More info in User Guide 'Links: Memos,… See Also Links', pages 31-33

EXERCISE 7: Cross-reference Lit. Review



Cross-referencing sources means you link different paper sections together or link a paper section to a whole paper.

Cross-referencing in NVivo is done through **See Also Links**.

Task 1: Link a line of argument from the literature review

i. Open the papers by Warburton et al. 2007 and Wilson and Janoski 1995.

ii. Go to pg. 25 in Warburton et al. – last paragraph, "Religious affiliation…"; Go to pg. 143 in Wilson & Janoski, first paragraph below Table 1, "Young adults provided…"

iii. Select Wilson & Janoski sentence > right click > **Copy**

iv. Select Warbuton et al. sentence > right click > Paste as **See Also Link**

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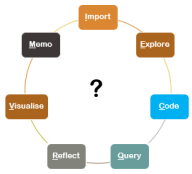
EXERCISE 7: Cross-reference Lit. Review



Task 2: View See Also Links

i. The window of the See Also Links opens at the bottom of the Detail view in the workspace.

ii. The window displays the name of the source (Wilson & Janoski) to which the text in Warbuton et al. is linked to.

iii. See also links are stored in the **Notes** menu. Review.

Task 3: Display See Also Link Map More info in User Guide 'Maps' page 35

i. Go to Navigation View > **Maps** > right click > **New Project Map**

ii. Name it **SA-Links from Lit Review** > OK

iii. Right click > **Add Project Items** > click on + sign of **Files** > highlight Lit review > tick Warburton et al. PDF > OK

iv. In the window Add Associated Data > select **See Also Links** > drag it across to the Project Map

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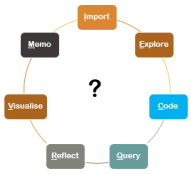
More info in User Guide 'Audio and Video transcripts', page 26

EXERCISE 8: Video Transcripts



Task 1: Import Video

i. In **Files** > highlight the **Focus Groups** folder.

ii. On the **Import** tab, click on **Files** > go to 'Focus groups' > select the **Video-Non Volunteers.wmv** file > OK.

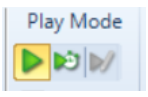
iii. View the Video environment (timeline, media player, transcript area)

Task 2: Transcribe Verbatim

i. Click **Synchronize Transcribe** mode (middle arrow) on the player >click **Play.**

ii. Listen to the first question asked. Click **Stop** after the question ends. In **Detail view**, select **Click to edit**. Enter the question in the **Content** area.

iii. Press **Play** again. Row # 2 is added to the transcript area.



iv. A participant answers: "Giving up your time." Press **Stop**.

v. Write the verbatim response in the **Content** area.

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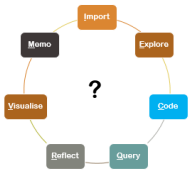
More info in User Guide 'Audio and Video transcripts', page 25

EXERCISE 8: Video Transcripts (cont'd)



Task 3: Import Interview Transcriptions

i. Import the **Cross-Cultural Solutions.wmv** video from your Interviews data folder.

ii. Click **Click to edit** > on the **Video Tools:Edit** tab > click Import Rows > click browse > select **Transcript Cross Cultural Solutions.doc** > **Open**

iii. In the section **Options** > in Create one transcript row for each > choose **Table Rows**.

iv. In the section **Transcript Field Mappings** > in the column **Transcript Field**, for the 1st row Timespan > click the down arrow > select **Timespan**.

v. Select **Content** (for 2nd row) and **Speaker** (for 3rd row) > OK.

vi. Repeat the steps for the Focus group video, Non Volunteers.

vii. You can export the transcript. Right click on the file in the list view of the workspace > **Export Video Transcript.**

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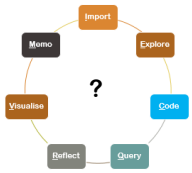
More info in User Guide 'Audio and Video transcripts', page 26

EXERCISE 9: Audio Transcripts



Task 1: Transcribe sequences of the audio file

i. Import Peter's audio into the Interviews folder from the data folder on your computer.

ii. The file appears in the List View alongside the other sources. Double click on it.

iii. In the **Audio** tab > in the group **Playback** > click on **Play/Pause** icon to listen to the recording.

iv. Move the seek slider across the timeline to listen to specific audio sequences.

v. Click on **Click to edit** > Listen to the sequence from 0:30 – 1.00 min of the interview

vi. After listening, select the sequence (by clicking on the waveline on 0.30 and clicking on **Start Selection,** and then clicking on 1.00, and then **Finish Selection**.) > Right click in **the selection** > select **Insert Row**.

vii. **Row # 1** is added and linked to the **sequence**. Summarise what Peter said in the **Content** section.

viii. Listen to the transcription: Click so the whole row is highlighted > Right click > **Play Selected Rows** (a pink line appears below the timeline.)

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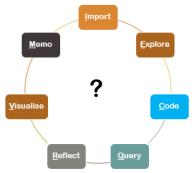
More info in User Guide 'Coding Audio and Visual Media', page 26

EXERCISE 10: Working with Pictures



Task 1: Import Pictures

i. Create a folder named **Pictures** in **Files**.

ii. On the **Import** tab > click **Files** > select pictures from the data folder on your computer > select **Sporting Club.jpg** and **Volunteers – Clean Up.jpg** > OK.

iii. Open the picture Sporting Clubs.

iv. Review the **Picture** tab now displayed in the **Ribbon** at the top of the workspace.

v. The picture environment displays **Region** (displays the picture's coordinates) and **Content** (comments on the selection) columns.

Task 2: Comment on Picture

i. Click on **Click to edit** > select the region where the kids and coach interact > right click > **Insert Row** > Row # 1 is added > write your comments.

Task 3: Import Picture Comments

i. On the **Picture:Edit** tab > click **Import Rows** > click **Browse** > select **Sporting Club – Picture Log Entries.doc** > **Open** > **OK.**

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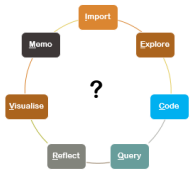
More info in User Guide 'Preparing survey results and other data sets', page 34

EXERCISE 11: Working with Survey Data



- Survey data containing open-ended answers and case attributes can be imported in NVivo from Excel spreadsheets or applications such as SurveyMonkey and Qualtrics.

Import Survey Data

i. Create a folder named **Survey** in **Files**.

ii. On the **Import** tab > click **Excel** > select the **Survey data.xlsx** file from the data folder on your computer.

iii. Click Next for Steps 1 – 4 in the **Import Dataset Wizard**.

iv. Review the dataset in the Table View.

v. You can code the qualitative data in the dataset by right-clicking on the ID part of the row and then '**Code**'.

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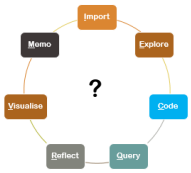
More info in User Guide 'Links: Memos, Annotations …', pages 31-32

EXERCISE 12: Create a Record of Work



- Memos can be created for any purpose: what you observe during fieldwork, impressions you are left with after an interview, content of your coding protocol, strategies for analysis, etc.

Create Memos

i. In **Notes**, highlight the **Memos** folder > right click in list view > select New Memo > name new memo: NVivo course

ii. Create a memo listing the things you have learned thus far.

iii. Create another memo listing your remaining questions.

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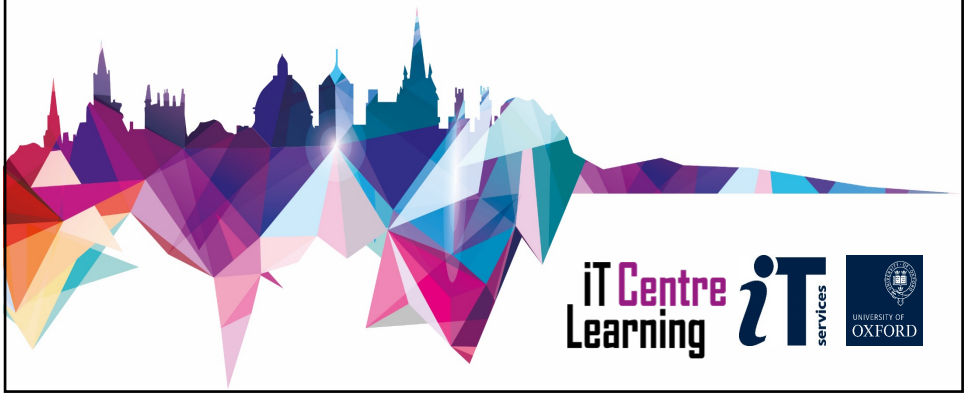
NVivo 12: Up and Running

Susila Davis, Charlotte Albury & Susan Divald

With many thanks to Zainab Kabba & Marie-Hélène Paré



PRACTICAL WORK

Exercises for you to practise today

Materials are all in the **ITLC Portfolio** for downloading

SESSION 2: DATA CODING & ANALYSIS

To download NVivo onto your laptops, visit
https://register.it.ox.ac.uk/self/software

TYPES OF CODING

Coding: the analytical process through which data is fractured, conceptualized, and integrated to form theory. (Strauss & Corbin)

- Deductive Coding
  - Codes used by other researches
  - Codes developed from literature review/extant theories
- Inductive Coding
  - Codes developed from raw data
- Hybrid Approach
  - Deductive & inductive coding

Characteristics of a good code: label; definition; descriptive (how/when occurs & any qualifications/exclusions)

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NODES & CODING IN NVIVO

- **Nodes** are **codes** you create to code data relating to a theme, a person, a place, a case, etc.
- Nodes can be organized into **hierarchies** from a general topic (**parent node**) to specific topics (**child nodes**).
- Approaches:
  1. **Manual coding**: nodes are created based on selected content in the data.
  2. **Auto-Coding** questions: a node is created for each question and contains all the answers. (Ideal when working with structured data.)
  3. **Running text queries:** a node is created based on the results of text searches that retrieve the occurrences of a word in the data. (Ideal when the literature review is used to generate codes.)

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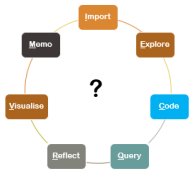
More info in User Guide 'Preparing text for auto-coding', pages 17-18

EXERCISE 1: Auto-Coding



- **Auto-coding** is the function whereby **data are coded** at nodes using an **automatic** command in NVivo.
- Auto-coding is suitable for semi-structured data collection.

Task 1: Format Semi-structured Data

i. On the computer, open the Interviews data in the Volunteering Data folder.

ii. Open the sub-folder Exercise –format transcripts > open **Bernadette**.

iii. Make sure the Styles pane is open on your screen.

iv. Select **Q.1 Current use of time** and **Q.2 – Q.7** using the **CTRL** key > click on **Heading 1** in the **Styles** pane.

v. Repeat the step above for the 7 sub-questions in the transcript (Q.1a, Q.2a, etc.). Format the sub-questions with **Heading 2**.

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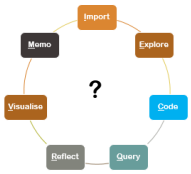
More info in User Guide 'Preparing text for auto-coding', pages 17-18

EXERCISE 1: Auto-Coding (cont'd)



Task 2: Format Focus Group Data

i. Format the focus group transcript (Volunteers 01) the same as you did for the interview transcripts.

ii. Format the respondents ID with **Heading 2**. Save.

Task 3: Auto-code Interview Questions

i. Create a folder called **Questions** in the **Nodes** section.

ii. Go to **Files** > click on the **Interviews** folder > select the 9 interviews > right click > click on **Auto Code**.

iii. In the Auto Code Wizard – **Step 1**: Select **Heading 1** and **Heading 2**, then the '**>>**' button > **Next** > **Step 2:** at the option **Under**, change to **Existing folder** > at the option **Name**, select **Questions** folder > OK > **Finish**.

iv. Review nodes in the **Questions** folder.

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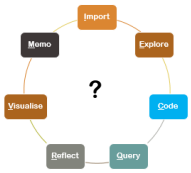
More info in User Guide 'Preparing text for auto-coding', pages 17-18

EXERCISE 1: Auto-Coding (cont'd)



Task 4: Auto-code Focus Group Data

i. Repeat the previous steps to **Auto Code** the **Focus Group** data.

ii. In the Auto Code Wizard – **Step 1**: Select **Heading 1** and then the **'>>'** button > **Next** > **Step 2:** at the option **Under**, change to **Existing folder** > at the option **Name**, select **Questions** folder > OK > **Finish**.

iii. Review nodes in the **Questions** folder.

Task 5: Create Parent Nodes

i. Right-click in List View > **New Node** > Name node **Interview Topics**.

ii. Drag and drop the interview nodes to this parent node.

iii. Right-click in List View > **New Node** > Name node **Focus Group Topics**

iv. Drag and drop the Focus Group nodes to this parent node.

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CODING TEXT

- **Coding at new nodes**
  Select the text > **Home** or **Document** tabs > **code selection at new node**
- **Coding "in vivo"**
  Select the text > **Home** or **Document** tabs > **Code In Vivo**
- **Uncoding**
  Select the text > **Home** or **Document** tabs > **Uncode** selection

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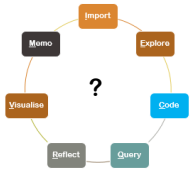
More info in User Guide 'Organising your data using nodes', pages 23-25

EXERCISE 2: Manual Coding



Create Thematic Nodes

i. Create a folder in the **Nodes** area called **Theme**.

ii. Go to **Questions** folder and open the node **Defining volunteer work** in **Focus Group Topics**.

iii. Read the first passage of **Stephanie**. She's talking about the issue of **taking time off** for volunteering. Create a node about the notion of **Taking time**.

iv. Select, **drag & drop** Stephanie's answer to the node **Taking time**.

v. Review Raul's answers and code at the same node. (highlight, drag & drop).

vi. Create another node called, **Lack of time.** Code at the at that node.

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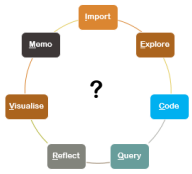
More info in User Guide 'Visual Markers of node coding', pages 26-27

EXERCISE 3: Visual Markers of Coding



Task 1: Visualize Nodes Using Coding Stripes

i. Open the node **Taking time** > go to the ribbon > in the **Node** tab > click on the icon **Coding Stripes** > select **Recent Coding**.

ii. Colored stripes appear on the right side of the **Detail View**.

Task 2: Visualize Nodes Using Highlight

i. **Node** tab > **Highlight** > Select the nodes you would like to visualize.

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CLASSIFICATIONS

- **Classifications** are **descriptive** information you assign to **sources** or **nodes**.
- This information can be used to **classify** your sources or nodes by groups which are called **Sets**.
- **File classifications** are used to store bibliographic information about your data.
- **Case classifications** are used to store demographic, institutional, or geographical data about case nodes.
- Your Classification data can be imported from Excel or txt.
- If you work with a small number of cases and with few attributes, you may want to create a **case classification** directly in NVivo.

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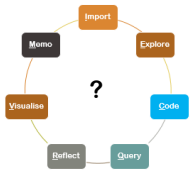
More info in User Guide 'Organising your data using classifications', page 19

EXERCISE 4: Cases



i. Create a sub-folder in your **Cases** folder called **Cases**.

ii. To create cases from the interview data **Autocode** the sources. This can be done by **either**:
→ using the respondent user ID which is formatted with **heading style 3**. (choose **Cases**, **Under- Existing Folder)** or
→ using the Speaker name function in **Autocode**.

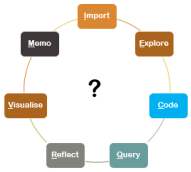
iii. A Case is created for each interview respondent.

iv. Repeat the steps and create cases from Focus Group data.

50

More info in User Guide 'Creating case classifications', pages 19-20

EXERCISE 5: Case Classifications



Task 1: Create case classification

i. Go to the **Case Classifications** folder (under **Cases**) > right click in List View > select **New Classification**.

ii. Use the built-in templates, choose the second option, **Add one or more predefined classifications to the project** > tick the **Person** option > OK.

iii. The Classification Person has been added in the List View > click the + sign to view the attributes present.

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EXERCISE 5: Case Classifications (cont'd)

Task 2: Classify Cases as Person

i. Go to **Cases** > select all cases > right click > select **Classification** > **Person**.

ii. Click the **Home** tab > click **Case Classification** > choose **Person**.

iii. Manually assign the attributes to each case.

Task 3: Import Case Classification from Excel

i. Go to the **Case Classifications** folder > right click in List View > click Import Case Classification Sheet.

ii. In the **Wizard step 1** > locate the **Case Classification Sheet** file in the Volunteering Data on your computer

iii. In Step 3, click the option **As names**. In the **Select location** window > highlight the folder **Cases** > **OK** > **Next** > **Finish**.

Shall we check our understanding?

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RUNNING QUERIES

- Word frequency queries identify the most frequently occurring words (or sets of similar words around a concept).
- Text search queries identify all references to a word or phrase, also looking for similar words (useful for quick coding).
- Coding queries look for content coded at selected nodes, a combination of nodes, or a combination of nodes and attributes.
- Compound queries combine text search and coding queries, text searches where one term precedes the other or two coding queries when content coded at one node is near content coded at another.

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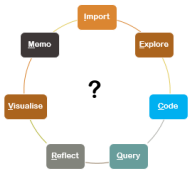
More info in User Guide 'Querying data', page 28

EXERCISE 6: Word Frequency Searches



i. In the **Explore** tab > **Word Frequency** > Set parameters > **Run**.

ii. Examine the Word Cloud, Tree Map, and Cluster Analysis on the right hand side of your screen.

iii. Re-try your research, but eliminate shorter words or move the **Finding Matches** bar from **Exact** to **Similar**.

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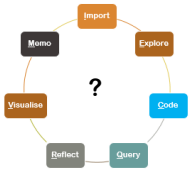
More info in User Guide 'Text searches', pages 28-29

EXERCISE 7: Text Searches



i. Text search query for "**make a difference**" (use "" marks).

ii. In the **Explore** tab > **Text search** > Insert text > **Run**.

iii. Review results in Detail View; Word Tree Tab

iv. Try using the Special instructions button on the right to narrow your search:
   - Asterisk (*) as a substitute for zero or more characters.
   - Question mark (?) as a substitute for a single character.
   - You can use Boolean operators AND, OR, NOT or + (required)
   - Fuzz search: 'color~' will find 'colors' or 'colour'
   - Specify proximity: "happy busy" ~102

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More info in User Guide 'Coding queries', page 29

EXERCISE 8: Coding Queries

Coding query finds content coded at a **combination** of **nodes**, or a **combination** of **nodes** and **attributes**.
***Because this query looks for content coded at nodes, you should have coded your data before running it.*

Task 1: Coding query of social interaction by Australian women

i. Go to the **Explore** tab > click on **Coding**.

ii. Click on **Selected Items** > click the +sign of Nodes.

iii. Highlight the folder **Themes** > in the right hand window > open the parent node **personal goals** > tick **social interaction** > **OK**

iv. In the **Search for content matching these criteria** window, you should see **Content Coded at social interaction**.

v. In the criteria section, choose **Coded at** > **Any Case Where** > click on the '…' button > Open **the Classification Case** > Click on **Country** > OK > In the **equals values** drop down list > select **Aust** > Run Query

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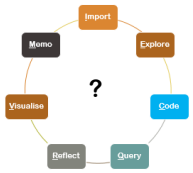
More info in User Guide 'Coding queries', page 29

EXERCISE 8: Coding Queries (cont'd)



Task 1: Coding query of social interaction by Australian women (cont'd)

vi. REPEAT to add the **female** attribute.

vii. In the **Query Results** folder (under **Search**) > select the results > right click > **Create As** > **Create As Node**

viii. Name the new node. Click **Run Query**.

ix. View results of the coding query in the Detail View.

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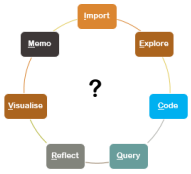
More info in User Guide 'Creating a Codebook', page 27

EXERCISE 9: Creating a Codebook



i. Under the **Share** tab > **New report** (via the Wizard).

ii. Select the option **From a view: Node.**

iii. Expand the submenu under **Node**.

iv. Choose **Name** and **Description** fields and move to right column.

v. Continue clicking **Next**.

vi. Name your report **Volunteering Codebook.**

vii. **Finish**.

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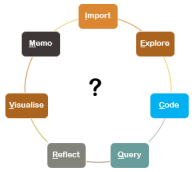
More info in User Guide 'Sets', page 33

EXERCISE 10: Creating Sets



*If you want to find items based on their **attributes** use the **Advanced Find** feature on the **Find** bar.*

Task 1: Find all nodes related to volunteers in your project

i. In the **Search Project** box, type **volunteers**.

ii. In the drop down menu next to 'x'  > select **All Codes.** Four items should be displayed.

Task 2: Create a Volunteers Set

i. Highlight the four items > right click > choose **Create As** > **Create as Set**. Name the set **Volunteers nodes**.

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More info in User Guide 'Sets', page 33

EXERCISE 10: Creating Sets (cont'd)

Task 3: Locate cases of Australian females

i. In the **Explore** tab, click on **Advanced find** to search for cases.

ii. In the **Find** bar > click **Advanced find** > in the **Search Criteria** tab at the **Look for** option > choose **Nodes**.

iii. Click on the Advanced tab. In the **Define more criteria** section > **at Interaction** > choose **Attribute**.

iv. Click the + sign **Cases** > choose **Country** > **OK**

v. Under the **Value option** leave it at **Aust** > Click **Add to list**

vi. Repeat for **gender** > choose **female**.

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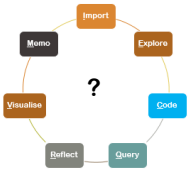
More info in User Guide 'Sets', page 33

EXERCISE 10: Creating Sets (cont'd)



Task 4: Locate cases of Australian males

i. Repeat steps for Australian attribute and male attribute.

ii. Highlight the items > right click > choose **Create As** > **Create as Set**. Name the set '**Aust males**'.

iii. Go to the **Search** folder > in **Sets** > the set for Australian Females and Males is added to the list. These sets are shortcuts to the actual cases.

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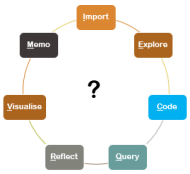
More info in User Guide 'Sets', page 28

EXERCISE 11: Running a Group Query



Task 1: Locate people who have and have not volunteered

i. In the **Explore** tab > click on **Group (query)**

ii. In **Look for** > choose '**Items by Attribute Value**'

iii. Next to **Scope** > choose '**Selected Attribute Values**'. Then select Case Classifications on the left (do not check the box, just select the folder).

iv. Expand the **Case** classification sheet using the + next to Case.

v. Expand '**Has volunteered**' and check the '**Yes**' and '**No**' boxes to see cases that have these attributes.

vi. Click on **OK** > **Run**.

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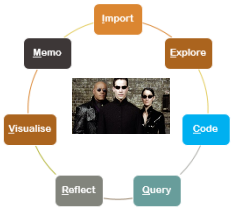
More info in User Guide 'Querying data', pages 28

EXERCISE 12: Matrix Query



Matrix Query looks for content coded a pair of items and displays the results in a table.

Task 1: Run a Matrix Query

i. Go to **Explore** > **Queries** > in **List View** > right click > **New Query** > **Matrix Coding**.

ii. In the **Matrix Criteria** section > in **Rows** > click on the ✚ > click **Attribute Values** > **Select Items**.

iii. In the **Select Project Items** window > highlight the folder **Case Classification** > click on **+sign** of **Age group** > tick all values from **20-29** to **60+.** (Do not tick Unassigned & Not Applicable.) > **OK**.

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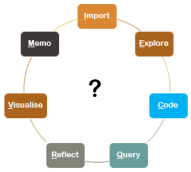
More info in User Guide 'Querying data', page 28

EXERCISE 12: Matrix Query (cont'd)



Task 1: Run a Matrix Query (cont'd)

i. In **Columns** > click on the ✚ > click **Select Items**.

ii. In the **Select Project Items** window > click on **+sign** of **Nodes folder** > highlight the **Themes** folder.

iii. On the right > click on **+ sign** of node **meanings of volunteer work** > **tick all child nodes** > **OK**.

iv. Click **Run**.

*By default, the **matrix** displays the **number of coded references** for **each pair of items**.*

Shall we check our understanding one last time?

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Thank you!

All the best with your research and adventures with NVivo ☺

IF YOU WANT TO CONTINUE WITH THE EXERCISES, YOU COULD…

Copy the Exercise files to a memory stick

Download the files (and more) from the ITLC Portfolio at http://portfolio.it.ox.ac.uk

courses@it.ox.ac.uk