

Learning Resources

The Leading Qualitative Software Tool Used by Qualitative Researchers

Training Options

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Learning Resources

Here are bite-size how to:

- [NatCen Framework Methodology using NVivo](#) – Framework Methodology is explained here.
- For technical issues on NVivo go to the QSR website and complete the [customer support form online](#), or alternatively tweet @NVivoSup with your question.

For the success of a team project, there must be a project administrator or manager, responsible for:

- Templates and instructions for data preparation.
- Facilitating the setting up of the project in NVivo, using the Design Framework, by the team.
- Division of work within the team – e.g. assigning responsibilities to team members. Sources to import and code.
- Establishing and maintaining naming conventions for the project items, copies of master project for each coder, naming of the master project at different times of merger.
- Quality control. E.g. using the coding comparison tool in NVivo (optional) to check the consistency or agreement of coders' shared understanding of the research topics. Optional and can be done at the early in the project.
- Merging of the team's work into one joint NVivo project, at different time points and sending copies of the joint project back to team members to carry on work.
- Calling team meetings to discuss and consolidate the growing open codes into hierarchical nodes.
- Engage the help of IT staff of your organisation, to create a dedicated storage space on the organisation network drive and give read and write permission to the members of the project team. This is where each member will submit their project at date and time intervals set by the project manager, so the team project can be merged.

- After the merger, the project manager then sends an email to all team members to download a copy of the merged team project onto their own computers to continue with their coding until the next call for merger.

Was this information helpful?

Your feedback is the only means for us to improve.

Yes 1

No 0

Usually in focus group transcript when we have more than two speakers, for example Alice and James. The transcript may look like this:

Alice: Lorem ipsum dolor sit amet, per an nusquam percipitur scribentur, eam et mundi scribentur theophrastus. Pro in euismod persequeris. Qui ferri explicari ei, te qui tale euripidis. Consulatu democritum te eos. An quo dico vocibus, eu ancillae sententiae cum. Mea at tale iuvaret voluptatum, natum autem audire eos ne.

James: Lorem ipsum dolor sit amet, per an nusquam percipitur scribentur, eam et mundi scribentur theophrastus. Pro in euismod persequeris. Qui ferri explicari ei, te qui tale euripidis. Consulatu democritum te eos. An quo dico vocibus, eu ancillae sententiae cum. Mea at tale iuvaret voluptatum, natum autem audire eos ne.

To get NVivo to know that Alice is a female speaker and James – male, you need to introduce a Heading style to Alice and James, e.g. H1. So the text would look like:

Alice

Lorem ipsum dolor sit amet, per an nusquam percipitur scribentur, eam et mundi scribentur theophrastus. Pro in euismod persequeris. Qui ferri explicari ei, te qui tale euripidis. Consulatu democritum te eos. An quo dico vocibus, eu ancillae sententiae cum. Mea at tale iuvaret voluptatum, natum autem audire eos ne.

James

Lorem ipsum dolor sit amet, per an nusquam percipitur scribentur, eam et mundi scribentur theophrastus. Pro in euismod persequeris. Qui ferri explicari ei, te qui tale euripidis. Consulatu democritum te eos. An quo dico vocibus, eu ancillae sententiae cum. Mea at tale iuvaret voluptatum, natum autem audire eos ne.

Now to achieve this, you would do Find and Replace Alice: with Alice^p;
Heading-1

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Yes 1

No 0

The Framework Approach is a method developed by Jane Ritchie and Liz Spencer from the Qualitative Research Unit of the National Centre of Social Research, known as NatCen which is the UK's largest independent social research agency. It is a method that is widely used by applied policy researchers.

Framework analysis is better adapted to research that has specific questions to create a structured data with question titles. In the analysis, data is thoroughly read, then described, interpreted and summarised into matrices. The **Columns** of the matrices are the identified themes, key issues and concepts; and the **Rows** are the cases/transcripts/documents and their demographics characteristics. Thus, each cell e.g. A1, contains the summary of what was said, or meant by case_1 (in row1) on a theme_A (column A).

In this section you will learn how to:

1. Use Existing Coding Structure to Create a Framework Matrix
2. Create a Framework Matrix
3. Automatically convert existing **NVivo** coding into a framework matrix.

1-Use Existing Coding Structure to Create a Framework Matrix

1. Framework used the Nodes structure and classification created in NVivo, so ensure you have setup the Node structure and Classification for your sources.
2. Import your sources into your file folder(s) and then create them as case nodes.
3. Ensure your case nodes are linked with the classification sheet and that each is assigned to their attribute values.

Note: Coding your transcripts into the Coding Structure, the traditional NVivo way is **not required**, however, you should if you want to use the Framework Matrices *Auto-Summary* function to automatically populate the framework matrix cells with your coded references.

2-Create a Framework Matrix

(Note: Framework matrices are not available in the Mac)

Suppose you want to summarise what each policy document reported about the Sense of community in Down East, and also track each document's county.

Do this:

1. From the menu, select create **Framework Matrix**.
2. Name your matrix – **Sense of Community** and an optional description.
3. Click on the **Rows** tab then the **Select** button underneath the selected cased box, to navigate to the Cases folder\...\ to select all the participants.

Note: from the select button, you can use Search Folders to narrow down further what you want to explore in the Framework Matrices.

1. Click on the **Select** button underneath the next box (Select attributes to sort the rows by) to choose the required attribute(s).
2. Open the Person classification sheet and select your required attributes.
3. Click **OK**.
4. Next click on the **Columns tab** then the **Select button** underneath the box, to select the themes or nodes structure.
5. Click on **OK** to complete the setup of the framework matrix.

3-Summarise Transcript or Documents Case by Themes into The Matrix

The Framework Matrix View will display Excel looking sheet of Themes as the Columns and Rows as Cases(documents) and a second view showing the content of the first Case.

Do this:

1. Click in the empty Cell_A1 – Case_1(Barbara transcript) and on column_A (sense of community theme).
2. Read the associated transcript, then describe, interpret and summarise into the cell-A1.
3. Link your summary in the cell to the associated text from the paragraph where you generated the summary from. To this by highlighting your summary in the cell.
4. Again, highlight the context in the document to which you want to show where you got your summary from. Right-mouse click on the highlight and press the keys **Ctrl+L**. This will show transparency of your summary.
5. Repeat this process to summarise all the transcript into the Row_1 for all the columns.
6. Repeat this process to summarise all the transcripts or cases in their rows.

Note: You can add or remove rows and columns from the framework matrix after you have created it. Matrices summaries are stored separately in your project so, removing rows or columns from the matrix do not affect your NVivo coding summaries.

4-How to Summarise Existing NVivo Coding Automatically into A Framework Matrix

If you have coded your sources in the traditional NVivo way and would like to generate a birds' eye view of your coding and maybe edit or summaries further your coding references using the Framework Matrices Auto Summary function, then

Do this:

1. Follow the instruction in section-2 above to create the empty framework

matrix structure.

2. From the **Framework Matrix** Tab, select **Auto Summarize** from the **Summary group**.
3. Your matrix content is generated. You can further summarise or edit the coded content.

Associated Views of the Framework Matrix

You can arrange the associated views from the **Framework Matrix**.

Content pull-down menu gives access to the following:

- **Row Coding** – shows content coded at the row (case node) in the associated view.
- **Cell Coding** – shows content coded at both the row (case node) and the column (theme node).
- **Summary Links** – show only content that has been linked to the associated text in the current matrix cell.

Layout View

You can change the layout of the associated data view to Right, Left or Hide it.

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Yes 1

No 0

How to Import Excel Datasheet into NVivo

(Note: This can be done both in the Windows and the Mac versions of the NVivo)

Do this:

1. Locate your Excel workbook.
2. Click on the folder in the **Files** where you want to import the dataset to.
3. Right-mouse click in the list view and select **Import>Import Survey>From Microsoft Excel file**.
4. Locate the survey sheet and click on **Open**, to open the survey import wizard.

The wizard will do the following three things represented by the three icons in the screen that will appear on your screen:

4. Each **row** of data will be created as a **case**.
5. Closed-ended questions are created as **case attribute**.
6. Open-ended questions will be created as **nodes**.
7. Click **Next**.

8. Check the next screen to ensure that this is the data you wish to work on. Use the slider at the bottom of the sheet to double check that all your data are in here.
9. Click **Next** to continue.
10. If you wish to identify each record by a unique record ID, then at the 'Select a unique ID for each of your cases' replace the 'RowId' with your unique ID.
11. If you **have not** already created a classification table, then select **Create new classification** and provide a name.
12. If you have previously setup a Classification table for your cases, then choose 'Add to existing classification' and select the classification name.
13. Click **Next** to continue.
14. If there is any field of data you do not want to import, click on '**Don't Import**'. RowId or Return date.
15. Click **Finish** for NVivo to start the process.
16. Click **Close** to complete the process.

Examine the three outputs created by the wizard

- Creation of Cases:

Open the **Cases\Cases\Survey Responses**> and see what the wizard has done.

- Creation of the demographic attributes and values associated to each case in a case classification sheet.

Open the **Cases\Case Classifications**> double-click on **Survey Respondent** sheet.

- Creation of Nodes for the open-ended questions

Open the **Codes\Nodes\Survey Responses**> to see what the wizard has done.

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No 0

How to Auto Code Media Transcript by a Custom Field

Sometimes in focus groups transcript there may be a need to attribute all the speakers. If you have a speaker custom fields in your audio or video transcripts, you can quickly auto code the audio/video file by speaker. NVivo can create a case node for each speaker and code the content at each speaker's case node so individual speakers can be attributed with their demographic data.

In our example, we will use Ken's transcript file and his media file.

Do this:

1. Open the file to ensure that the custom field, speaker, is set to Heading1 (simply click on the text and while on the File Menu>Styles group).
2. If it's not, then make changes and save the file.
3. Close it so you can use it for the exercise.
4. In List View, select Ken un-transcribed media file. No need to open them.
5. Right-mouse click on your selection for the pop-up menu. Choose Auto Code.

The Auto Code dialog box opens.

6. From the available paragraph style list, select **Heading 1** and transfer it to the selected paragraph styles box.
7. Click on Next to move to the next screen.
8. Select the location where each speaker's case node, should be stored.
9. Click on the **Select** next to the **Name** box and choose **Cases**.
10. Click **OK**, then **Finish** to complete the process.
11. Open the **Cases**, then **Cases** to see the individual respondents.
12. Finally, you must select all the newly created cases, right-mouse click on the selection and choose **Classification** then the named classification you have created for your participants. **Ensure classification is already created.**

Was this information helpful?

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Yes 1

No 0

How to Review Coding on a Transcript

To examine how much Coding is done in a transcript. You could turn on the coding **highlight** or **coding stripes**.

Turn on Coding Highlight

Do this:

1. Open the coded transcript.
2. From the **Document** menu, you will see two options: Coding Stripes and Highlight.
3. Click on the drop-down arrow under the Highlight and select either **All Coding** or **Coding for Selected Items**.

All content coded in the transcript are highlighted in yellow. **Please note**

that all the content will be highlighted if the document has been auto coded at a case node.

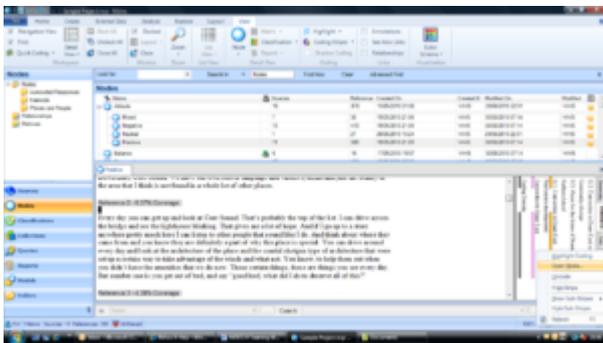
You will not know which nodes the highlighted references are coded at. If you want to see the nodes at which the references are coded at, then you need to **turn off** the **highlight** and turn on the **Coding Stripes**.

Turn on Coding Stripes

Do this:

1. From the **Document** menu, you will see two options: **Coding Stripes** and **Highlight**.
2. Click on the drop-down arrow under the Coding Stripes and select **All Coding** or one of the other options to suit your needs.

Coding Stripes are displayed on the right side of the source.



The Displayed Coding Stripes with the Transcript

Currently you can only Print the transcript with the displayed coding stripes. The Print Options includes, printing the Coding Stripes on the same page or on adjacent pages.

Or you may capture the screen as a photo. I know this is not great especially, if the transcript runs over pages!

Was this information helpful?

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Yes 1

No 0

To synchronise a Word transcript the raw media file in NVivo, you must create a table with at least three columns: Timespan, Content, Speaker. It does not matter if the timespan column is filled or not.

Do this:

1. Open Ken's video, un-transcribed file.
2. Make sure you are in **edit mode**, by clicking on the Edit on top of the opened media file.

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Yes 1

No 0

Access to NVivo Software

NVivo Byte Size

310ct 19

[“Ask the Expert” – NVivo Q&A](#)

Q: How do you export the transcript to see which parts you have coded what the codes are in a clear and simple way? A: Sorry, currently you can only...

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Download All Versions of NVivo

Watch How to Use NVivo for Literature Reviews

Read Why You Should Use NVivo for Your Literature Review

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Yes 1

No 0

I am text block. Click edit button to change this text. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut elit tellus, luctus nec ullamcorper mattis, pulvinar dapibus leo.