

# Using NVivo for Qualitative Data Analysis

29 May 2025

Dani Madrid-Morales



# Schedule

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9:30 - 11:30 am	<p><b>An Introduction to Using NVivo, Dani Madrid-Morales</b></p> <p>This session offers a practical introduction to NVivo, a leading software tool for qualitative data analysis. Participants will learn how to navigate the interface, organise their data, and begin basic coding.</p>
11:45 - 1:15 pm	<p><b>Applications of NVivo Pamela Y Abbott</b></p> <p>Participants will learn how to conduct document and bibliography analysis, as well as how to use NVivo's built-in tools—such as Wordclouds and text queries—to explore patterns and themes across datasets.</p>
2:15 - 4:45 pm	<p><b>Doing Qualitative Analysis: A Hands-on Session, Mon Rodriguez-Amat</b></p> <p>Participants will work with real-world qualitative data to code, reflect, and interpret using NVivo. The focus is on applying qualitative research principles in a guided, collaborative environment.</p>

# Today's Learning Objectives

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By the end of this session, you should be able to:

- Create a new **NVivo project**
- Navigate the NVivo **interface**
- Import qualitative data (e.g., Word docs, PDFs, audio)
- Set up case **classifications** and assign **attributes**
- Begin **coding** your data in a structured way

# Session Overview

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Interface Overview & Project Setup	Creating a new NVivo project, navigating the workspace, understanding ribbons and panels, importing files (e.g. interview transcripts, PDFs, audio, video).
Case Classifications & Attributes	Creating cases for participants or documents, assign attributes (e.g. role, gender, year), and link to sources.
Hands-on Practice	Set up a new project, create new cases and assign attributes. Brief guided reflection: how might you use this in your own project?
Coding Qualitative Data	Introducing coding in NVivo (manual vs auto). Demonstrate how to create nodes, code text segments, and structure nodes hierarchically.
Hands-On Practice 2	Activity to try open coding on a sample transcript and create 3–5 codes of their own.
Q&A + Wrap up	Recap and next steps

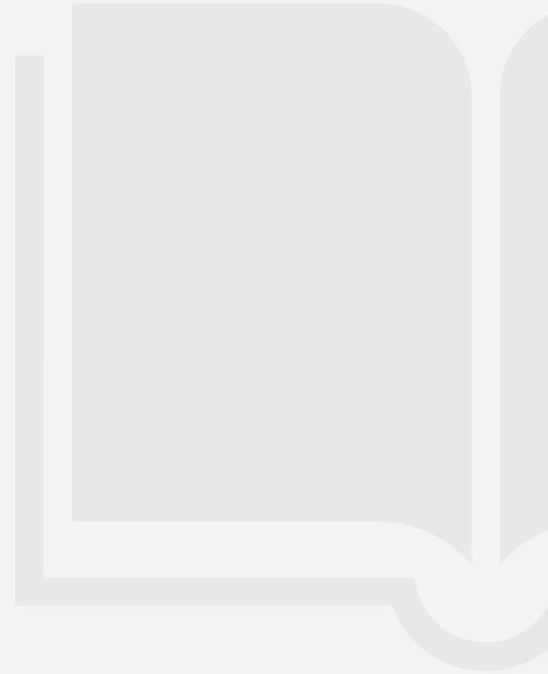
# What you need to follow today's session

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To participate fully, you should have:

- NVivo installed on your computer
- [Sample documents](#) for the live demos
- Your own files/data to play around during hands-on activities
- This slide deck

# NVivo Overview



# Why Use NVivo?

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- Qualitative research often generates large volumes of unstructured data. NVivo helps you manage this complexity by allowing you to:
  - Organise your files and notes
  - Code and retrieve key themes and ideas
  - Link demographic data to participants
  - Conduct queries and generate visualisations

**Navigation Pane – gives access to data, codes, queries, and visuals**

## Files

All the data files you import into the project are stored in the Files folder. You can create new documents here, as well.

Optionally create subfolders to organize your data—for example, put all interviews together in one folder.

- To import files located on your computer, go to the **Import** tab and use the **Files**, **Survey** or **NCapture** commands. You can also drag and drop files into this space.
- For files that you have sent to NVivo with NVivo–Office Integration, use the **Collect Office Files** command on the **Modules** tab.

[\[more\]](#)

**Detail View – shows the content of selected files or codes**

**List View – displays items in the selected folder**

Close

# NVivo Terminology

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**Files (or "Sources"):** Raw qualitative data—interviews, focus groups, PDFs, media, etc.

**File Classifications:** Metadata about files (e.g. source type, publication year, author), usually applied to documents for literature reviews or grey literature analysis.

**Cases:** Represent people, places, or entities tied to your data. E.g., an interview participant or organisation. These are used for participant-level analysis.

**Case Classifications:** Attributes assigned to cases (e.g. gender, age, region). This lets you compare across groups.

**Sets:** Custom, researcher-defined groupings. E.g., a set of files coded for “Trust” or a subset of interviews from a specific site.

**Codes (or "Nodes"):** Thematic or conceptual labels applied to segments of data.

# Key Terms

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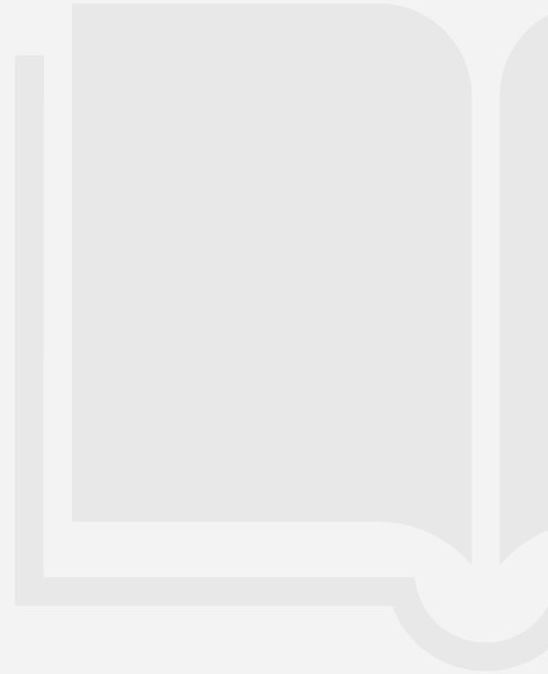


# Working with files

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- NVivo is quite versatile in the type and format of documents it is able to handle. You can import interview transcripts, fieldnotes, and reports in formats such as DOCX, TXT, or PDF. NVivo also supports importing media files including images, video and audio.
- Folders help you stay organised. You might create folders by data type (e.g. interviews, field notes), by participant group (e.g. teachers, students), or by phase of research (e.g. pre-study, post-study).

# Cases & Attributes



# What are cases?

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- In NVivo, a 'case' represents a unit of analysis—usually a person, group, organisation, or document. For example, each interviewee in your dataset could be a case. Cases allow you to link qualitative content (e.g. coded text) to demographic or contextual attributes for analysis.
- Cases are essential for comparing data across participants or groups. They let you ask questions like: What themes are most common among interviewees from a specific region? How do responses differ by gender or job role? Cases create the foundation for this kind of analysis.

Sample Project.nvpx

**IMPORT**

- Data
  - Files
    - Area and Township
    - Interviews
    - Literature
    - News Articles
    - Social Media
    - Survey
  - File Classifications
  - Externals
- ORGANIZE**
- Coding
  - Codes
- Cases
  - Cases
  - People
  - Places
  - Case Classifications
- Notes Case Classifications
- Sets

**EXPLORE**

- Queries
  - Query Criteria
    - Attitude
    - Development
    - Geographical text queries
    - Queries by community
  - Query Results
  - Coding Matrices
- Visualizations

Home Edit Import Create Explore Share Modules Log In Search

Clipboard

Item

Organize

Visualize

Code

Autocode

Uncode

Code In Vivo

Spread Coding

Case Classification

File Classification

Workspace

Name	Files	References	Created on	Created...	Modified on	Modified by	Color
Interview Participants	0	0	2 May 2012 at 01:21	WWS	2 May 2012 at 01:21	WWS	
Barbara	2	21	25 Jun 2010 at 20:...	WWS	19 Feb 2020 at 05:...	WWS	●
Betty	1	1	23 Jun 2010 at 21:24	WWS	19 Feb 2020 at 05:...	WWS	●
Charles	1	13	2 May 2012 at 01:23	WWS	19 Feb 2020 at 05:...	WWS	●
Daniel	1	11	23 Jun 2010 at 21:29	WWS	19 Feb 2020 at 05:...	WWS	●
Dorothy	1	16	23 Jun 2010 at 21:49	WWS	19 Feb 2020 at 05:...	WWS	●
Helen	1	7	23 Jun 2010 at 22:10	WWS	19 Feb 2020 at 05:...	WWS	●
James	2	13	24 Jun 2010 at 03:10	WWS	19 Feb 2020 at 05:...	WWS	●
Ken	1	6	23 Jun 2010 at 22:...	WWS	19 Feb 2020 at 05:...	WWS	●
Margaret	1	10	23 Jun 2010 at 21:50	WWS	19 Feb 2020 at 05:...	WWS	●
Maria	1	8	23 Jun 2010 at 21:29	WWS	19 Feb 2020 at 05:...	WWS	●
Mary	2	12	24 Jun 2010 at 03:10	WWS	19 Feb 2020 at 05:...	WWS	●
Patricia	1	9	23 Jun 2010 at 21:31	WWS	19 Feb 2020 at 05:...	WWS	●
Paul	1	1	23 Jun 2010 at 21:25	WWS	19 Feb 2020 at 05:...	WWS	●
Richard	1	4	23 Jun 2010 at 21:35	WWS	19 Feb 2020 at 05:...	WWS	●
Robert	2	19	24 Jun 2010 at 03:10	WWS	19 Feb 2020 at 05:...	WWS	●
Susan	1	8	23 Jun 2010 at 21:52	WWS	19 Feb 2020 at 05:...	WWS	●
Thomas	1	8	23 Jun 2010 at 21:54	WWS	19 Feb 2020 at 05:...	WWS	●
William	1	8	23 Jun 2010 at 21:55	WWS	19 Feb 2020 at 05:...	WWS	●
Survey Respondents	0	0	2 May 2012 at 01:22	WWS	2 May 2012 at 01:22	WWS	
Twitter Users (Username)	0	0	3 May 2012 at 03:03	WWS	9 May 2012 at 06:23	WWS	

1 item selected

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**NVIVO**  
Sample Project.nvpx

**IMPORT**

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

**ORGANIZE**

- Coding
  - Codes
- Cases
  - Cases
  - People
  - Places
  - Case Classifications
- Notes
- Sets

**EXPLORE**

- Queries
  - Query Criteria
    - Attitude
    - Development
    - Geographical text queries
    - Queries by community
  - Query Results
  - Coding Matrices
- Visualizations

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Clipboard Item Organize Visualize Code Autocode Uncode Code In Vivo Spread Coding Case Classification File Classification Workspace

Name Person

Person Person

Attributes Classification Sheet

Name	Respondent	Township	Community	Generations Do...	Commercial Fish...	Recreational Fis...	Income Tied to R...	Opir
Barbara	Q DE103	Q Straits	Q Bettie	Q 2	No	Yes	Q yes	Q
Betty	Q Unassign...	Q Straits	Q Straits	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
Charles	Q Unassign...	Q Atlantic	Q Atlantic	Q 1	Unassigned	Unassigned	Q Unassign...	Q
Daniel	Q Unassign...	Q Davis	Q Davis	Q 2	Unassigned	Unassigned	Q Unassign...	Q
Dorothy	Q Unassign...	Q Smyrna	Q Williston	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
Helen	Q Unassign...	Q Straits	Q Otway	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
James	Q DE102	Q Marshall...	Q Marshall...	Q 2	Yes	No	Q no, but w...	Q
Ken	Q Unassign...	Q Cedar Isl...	Q Cedar Isl...	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
Margaret	Q Unassign...	Q Davis	Q Davis	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
Maria	Q Unassign...	Q Davis	Q Davis	Q 1	Unassigned	Unassigned	Q Unassign...	Q
Mary	Q DE101	Q Marshall...	Q Marshall...	Q 3 or more	No	No	Q no, but w...	Q
Patricia	Q Unassign...	Q Cedar Isl...	Q Cedar Isl...	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
Paul	Q Unassign...	Q Straits	Q Straits	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
Richard	Q Unassign...	Q Cedar Isl...	Q Cedar Isl...	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
Robert	Q DE104	Q Harkers I...	Q Harkers I...	Q 1	No	Yes	Q no, never	Q
Susan	Q Unassign...	Q Harkers I...	Q Harkers I...	Q 3 or more	Unassigned	Unassigned	Q Unassign...	Q
Thomas	Q Unassign...	Q Harkers I...	Q Harkers I...	Q 1	Unassigned	Unassigned	Q Unassign...	Q
William	Q Unassign...	Q Straits	Q Otway	Q 1	Unassigned	Unassigned	Q Unassign...	Q
DE001	Q DE001	Q Straits	Q Straits	Q none	No	No	Q no, never	Q
DE002	Q DE002	Q Harkers I...	Q Harkers I...	Q 3 or more	No	No	Q yes	Q
DE003	Q DE003	Q Marshall...	Q Marshall...	Q 3 or more	No	Yes	Q no, but w...	Q
DE004	Q DE004	Q Smyrna	Q Williston	Q 3 or more	No	No	Q no, never	Q
DE005	Q DE005	Q Straits	Q Gloucester	Q 1	No	No	Q no, never	Q
DE006	Q DE006	Q Straits	Q Bettie	Q 3 or more	No	No	Q Unassign...	Q

1 item selected Cases > Case Classifications > Person

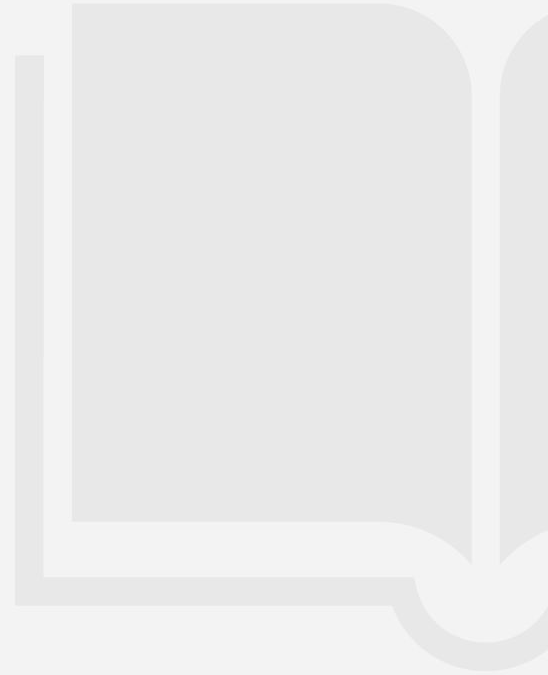
# Hands on Activity 1

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Using your own data or one or more of the sample files that we've been using so far:

- Import the documents to a new NVivo Project
- Create a new File Classification
- Use the auto-code function to create new cases
- Create a new Case Classification
- Save your project

# Coding on NVivo



# What do we mean by “coding”?

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Coding is the process of **identifying and labelling** segments of data that relate to your research questions or emerging insights. It is a foundational step in most forms of qualitative analysis and allows you to group related content together for interpretation.

# Why Code Your Data?

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Coding helps manage large volumes of data by:

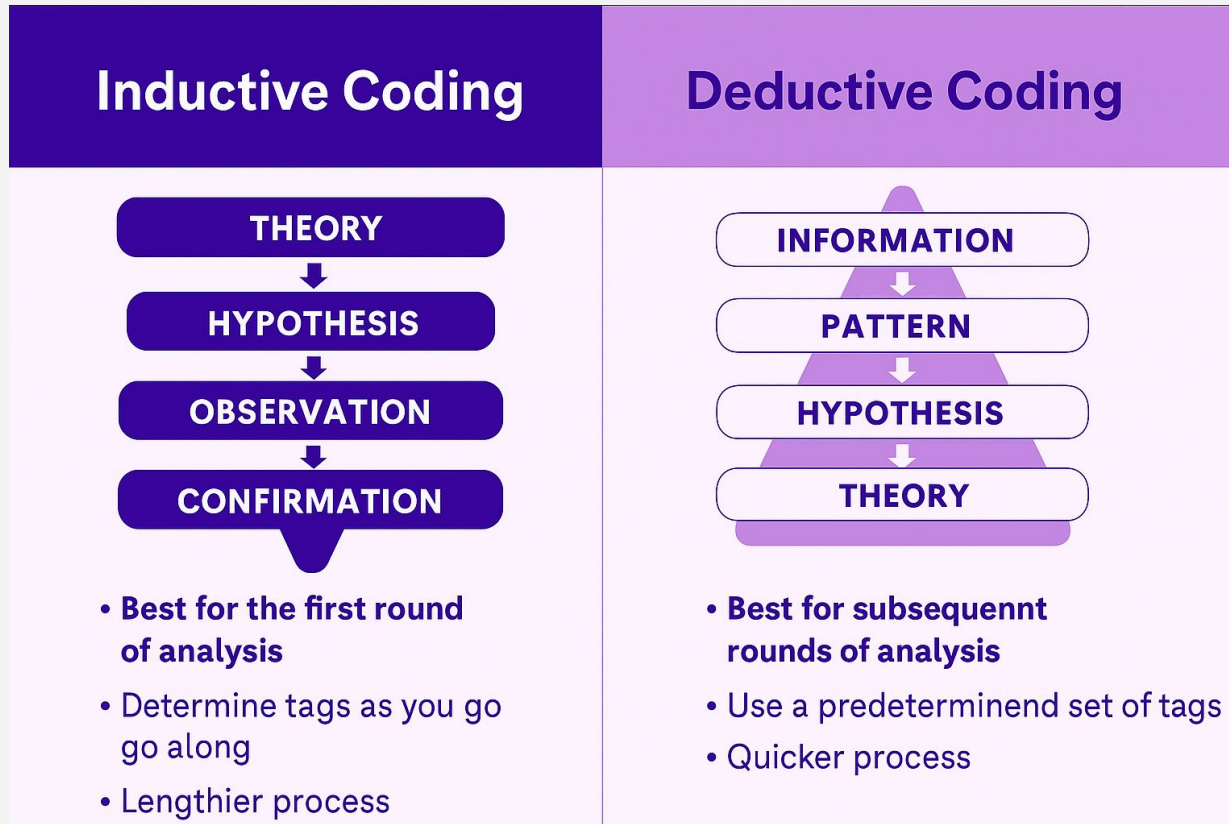
- Organising and tagging content systematically
- Making patterns and themes visible
- Facilitating comparisons across participants and topics
- Supporting the development of broader interpretations and conclusions

# Inductive vs. Deductive Coding

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- **Inductive coding** means developing codes from the data itself—starting without predefined categories and letting themes emerge naturally.
  - Use inductive coding when your study is exploratory or when you're not guided by a specific framework.
- **Deductive coding** involves using a predefined set of codes based on theory, literature, or your research questions.
  - Use deductive coding when you're testing a theory or framework.
- Most researchers use a combination of both approaches.

# Inductive vs. Deductive Coding



**NVIVO**  
Sample Project.nvpx

Home Edit Import Create Explore Share Modules Log In Q Search

Clipboard Item Organize Visualize Code Autocode Uncode Code In Vivo Spread Coding Case Classification File Classification Workspace

Name	Files	References	Created on	Created...	Modified on	Modified by	Color
<input checked="" type="radio"/> Attitude	0	0	15 May 2010 at 21:...	WWS	10 Nov 2015 at 02:...	WWS	●
<input type="radio"/> Mixed	8	44	15 May 2010 at 21:...	WWS	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Negative	14	500	15 May 2010 at 21:...	WWS	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Neutral	1	27	26 Jun 2010 at 13:24	WWS	29 Jun 2010 at 22:31	WWS	●
<input type="radio"/> Positive	12	422	15 May 2010 at 21:...	WWS	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Balance	6	16	17 May 2010 at 15:57	WWS	29 Jan 2020 at 04:...	WWS	●
<input type="radio"/> Community change	18	62	15 May 2010 at 21:...	WWS	29 Jan 2020 at 04:...	WWS	●
<input checked="" type="radio"/> Economy	24	302	15 May 2010 at 20:...	WWS	16 Mar 2011 at 03:16	WWS	●
<input type="radio"/> Agriculture	8	20	15 May 2010 at 20:...	WWS	23 Oct 2014 at 05:...	WWS	●
<input checked="" type="radio"/> Fishing or aquaculture	19	184	15 May 2010 at 20:...	WWS	29 Jan 2020 at 04:...	WWS	●
<input checked="" type="radio"/> Fishing industry decline	14	184	15 Jun 2010 at 19:50	HGP	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Due to cost of doing business	7	13	15 Jun 2010 at 19:51	HGP	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Due to environment impacts of fishi...	7	14	15 Jun 2010 at 19:51	HGP	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Due to foreign competition	8	22	15 Jun 2010 at 19:51	HGP	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Due to natural variation	3	6	15 Jun 2010 at 20:53	HGP	10 May 2012 at 05:...	WWS	●
<input type="radio"/> Due to regulations	5	15	15 Jun 2010 at 19:50	HGP	10 May 2012 at 05:...	WWS	●
<input type="radio"/> Due to tourism and development	6	13	26 Jun 2010 at 16:47	WWS	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Due to water quality decline	10	23	15 Jun 2010 at 19:50	HGP	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Jobs and cost of living	16	86	15 May 2010 at 20:...	WWS	23 Oct 2014 at 05:...	WWS	●
<input type="radio"/> Tourism	6	11	15 May 2010 at 20:...	WWS	23 Oct 2014 at 04:...	WWS	●
<input type="radio"/> Infrastructure	11	43	15 May 2010 at 20:...	WWS	10 Nov 2015 at 02:41	WWS	●
<input type="radio"/> Memorable quotes	5	16	1 Jun 2010 at 12:47	EDR	29 Jan 2020 at 04:...	WWS	●
<input checked="" type="radio"/> Natural environment	23	325	15 May 2010 at 20:...	WWS	29 Jan 2020 at 04:...	WWS	●
<input type="radio"/> Policy, management	14	38	15 Jun 2010 at 19:47	HGP	10 Nov 2015 at 02:...	WWS	●
<input type="radio"/> Real estate development	27	313	15 May 2010 at 20:...	WWS	23 Oct 2014 at 05:...	WWS	●
<input checked="" type="radio"/> Sense of community Down East	0	0	10 Nov 2015 at 03:...	WWS	10 Nov 2015 at 03:...	WWS	●

0 item selected

Clipboard
Item
Organize
Visualize
Code
Autocode
Uncode
Code In Vivo
Spread Coding
Case Classification
File Classification
Workspace

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**IMPORT**  
**Data**  
 Files  
 Area and Township  
**Interviews**  
 Literature  
 News Articles  
 Social Media  
 Survey  
 File Classifications  
 Externals

**ORGANIZE**  
**Coding**  
 Codes  
 Autocoded Responses  
 Autocoded Social Media

**Cases**  
 Cases  
 People  
 Places  
 Case Classifications

**Notes**  
**Sets**

**EXPLORE**  
**Queries**  
 Query Criteria  
 Attitude  
 Development  
 Geographical text queries  
 Queries by community  
 Query Results

Name  
 Barbara  
 Betty and Paul  
**Charles**  
 Dorothy  
 Helen  
 Ken  
 Margaret  
 Maria and Daniel  
 Mary and James  
 Richard and Patricia  
 Robert  
 Susan  
 Thomas  
 William

Charles  
 Charles

Coding Stripes  
 Highlight  
 Code  
 Annotations  
 Code Panel  
 Edit

**Q.1. Connection to Down East**  
*How long have you been living Down East?*

**Charles**  
 I've been living here for about six years.

**Linda**  
*So what attracted you to come here as opposed to the other places you could've picked?*

**Charles**  
 I've lived all over the country over the years, but I missed the salt water. And I've been in places where I haven't been in that salt water but for some reason there was just this very urge. I had friends who lived in Harkers Island and went to visit them. First thing I did, I went in and say hello, I just walked straight and walked right out in the water and just stood little while. And while I was home as part of that business trip, about three weeks into that got up one morning and real early, and drove down to Marshallberg and got here and spend day from Marshallberg heading east just taking notes on what was on the market, just look and so I spent the first day just doing some research and the next day I ended up buying the house.

**Linda**  
*So what makes Down East unique?*

**Charles**  
 The people make it special. Most of the folks here are native people, you know and they're the dingbatters like me. It's the fact that commercial fishermen make up the fiber and the

**CODE STRIPES**  
 Coding Density  
 • Q.4. Community and Environmental Change  
 • Real estate development  
 • Charles  
 • Q.1. Connection to Down East  
 • Local connection  
 • Q.5. Vision for the future of Down East  
 • Natural environment  
 • Community change  
 • Policy, management  
 • Negative  
 • Positive  
 • Fishing or aquaculture  
 • Eco

1 item selected

Data > Files > Interviews > Charles

# Hands on Activity 2

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Using your own data or one or more of the sample files that we've been using so far:

- Create a simple codebook with 2 top level codes
- Add one or more sub-level codes to your codebook
- Go through one document and apply your codebook
- Create one additional code based on your reading of the document(s)

# Takeaways

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1. Good organisation in NVivo is more than just convenience—it lays the groundwork for strong, reliable analysis. Clear folder structures, consistent naming, and well-defined cases and attributes will save you time and frustration as your project grows.
2. Coding is only one part of the qualitative analysis journey. Once you have coded your data, your next step is to explore what these codes reveal. Ask yourself: What patterns are emerging? Where are the differences? What surprised you?

# Common pitfalls

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- Creating too many vague or overlapping codes
- Not linking cases properly to sources
- Skipping classification and attribute setup
- Jumping into queries before coding is sufficiently developed

# What's next?

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- Explore coded content using coding queries
- Compare groups using matrix queries
- Generate visualisations (e.g., coding maps, heat charts)
- Write memos to capture your evolving thinking

# Schedule

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