Software Experts

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Session 3: Qualitative Analysis

Research methodologist Dr. Veronica Richard shares tips and strategies for managing qualitative data and conducting three rounds of basic thematic analysis (initial coding, pattern coding, themeing). Analyzing qualitative data is essential for (1) refining future data collection to ensure you are gathering data aligned with your research questions, and (2) writing up your findings. This session will help you turn an overwhelming process into a focused process. We help you understand what you are supposed to do, and we guide you through the process of how to complete the various cycles of coding and identifying themes. We also help you manage your mindset so that you can overcome limiting beliefs and gain confidence.

Agenda:

Dissertation by Design Coaches – 40 minutes
- Data management and analysis plan overview
- Data clean-up and memoing
- Initial coding - NVivo processes
- Pattern matching and organization
- Theme identification and definition

NVivo Expert – 30 minutes
- Show how NVivo manages and analyzes qualitative data

Citavi Expert – 10 minutes
- Show how Citavi integrates with NVivo to import references into NVivo for further analysis.

Questions – 10 minutes
Veronica M. Richard, PhD

- Director of Operations and Coach, Dissertation by Design
- Based in Greeley, CO
- Qualitative research expert
- Education, literacy, and leadership researcher
- Passionate about fostering research and literacy-related competence, ethics, and wellbeing in my work with scholars
- Passionate about exploring new ways to highlight participants’ voice through innovative methods
Learning Objectives

Understand the importance and value of a data management plan and data analysis plan.

Review initial coding processes, pattern matching, and theme identification.

Learn the importance and value of data clean up, reading/listening to transcripts multiple times, and memoing.

Understand how analysis informs future data collection and the writing of qualitative findings.
Poll

What is your current management process?

1. I do not have a management plan
2. I have a general management plan
3. I have a specific, step-by-step management plan
Data Management, Cleaning Data, & Memoing

• Research design considerations
• Digitizing and storing data
• Data accuracy and memoing
Management & Research Design

Research design matters!

- Essential qualitative research
- Phenomenological research and IPA
- Narrative
- Ethnographic research
- Case study
- Grounded theory

Single-level organization

Multiple-level organization
Management & Research Design

Example of single-level organization

- Essential qualitative, narrative, phenomenology or IPA

https://dissertationbydesign.com/how-to-choose-a-qualitative-research-design/
Management & Research Design

Example - multi-level organization

- Case study, ethnography, grounded theory

<table>
<thead>
<tr>
<th>Case 1</th>
<th>Case 2</th>
<th>Case 3</th>
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<td>P1-int. 1</td>
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<td>P3-int. 2</td>
<td>P3-int. 2</td>
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Data Management: Digitizing + Storing Data

Key questions to guide important decisions:

• Based on the data you will have, what do you need to digitize?

• Where will you store data? Where will you back up data?

• How will you maximize security and confidentiality of files? De-identify data?
Pre-Analysis Steps—Cleaning Data & Memoing

1. Reading and rereading
   a. Check for accuracy
   b. Identify vague words

2. Memoing
   a. Initial thoughts and impressions
   b. Reflexive notes
So let's begin. Can you just give me a quick overview of your role at Acerta Pharmaceuticals?

**Shelby:** Yep. By title, director of talent development, which actually covers quite a bit. Anything from professional development, that could be courses, e-learnings, it could be development plans, kind of all things under that bucket. A couple things that we have are LinkedIn learning, and things of that nature. Then I do leadership development. There's a program that we host here, know there are also a number of different courses that are specific to people leaders. Then the third bucket would be our emerging leaders' program. So, professional developments, leadership development, and then the emerging leaders' program are how I see it bucketed. Then all of that is hosted on our LMS, our learning management system. Then I play in other spaces outside of talent development, things like performance management, employee engagement, rewards and recognition, have been some pep projects, but because I think culture's really important that I had initiated within the last year here.

**Speaker 1:** You mentioned ELP, so the emerging leaders program, tie that to culture for me in your own words. What that means to you?

**Shelby:** One of the things that I am trying to build is a culture of learning. There's a lot that goes into that as it pertains specifically to ELP. I would say it's showing that we believe in growth and development of our people. Right? Instead of hiring externally, the goal with ELP is to groom from within. Really trying to make sure that people that want to grow within Acerta specifically, have those skills before they're promoted. To me as it relates to culture of learning it's growing them and showing people that we believe in them and we value their contributions and want to see them progress throughout Acerta.

**Speaker 1:** Okay. Great. That actually leads me to my next question then. How would you define culture and part two is what is your vision of culture here at Acerta?

**Shelby:** Culture is the unspoken norms, rules, behaviors, expectations within an organization. How do we behave, work together, collaborate as far as working together. Right? To me it's hard to put a label on what it is, because you feel it. You can walk into a company and you can feel it. Certainly, organizations will have their values, but some organizations will do a better job at living their values. Personally speaking, I don't know that we're fully embodying our values at Acerta. How are we living up to all of those? I don't know that we truly embody our culture at Acerta, but I do think we have a work hard, play hard mentality. I think that we enjoy collaborating as we analyze the 2017 engagement results as well as the 2019 engagement results. We are very strong as far as it comes to collaboration. It's one of the words that bubbles to the top.
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Data Management in NVivo
What is Qualitative Data Analysis?

Two-part Process: Analysis and Interpretation
Qualitative Analysis is ...

- Ongoing and Messy
- Strategic: inductive and deductive processes
- Detailed examination of data
- Micro level (unit of data or text segment)
- Macro level (holistic)
- Methodical and systematic
- Intuitive and creative
Interpretation is Making Meaning

- Make intentional decisions
- Memoing
- Condensing meaning across a data set
- Form of synthesis—patterning

Vanover, Mihas, & Saldaña (2022).
Key questions about your analysis plan

What do you want to know?

Who are the experts you used (or plan to use) to support your plan?

Is your plan detailed enough so that someone could replicate your process?

How will you track your decisions?
## Tracking Your Analysis Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Target completion date</th>
<th>In-process changes made and why</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact participants and obtain signed consent via email</td>
<td>✔ April 15th - May 1st</td>
<td>Recruited through Facebook and LinkedIn (IRB amendment) because …</td>
</tr>
<tr>
<td>Complete 1st round of interviews</td>
<td>✔ May 1st – May 15th</td>
<td>Interviews lasted between 51 and 65 minutes</td>
</tr>
<tr>
<td>Transcribe using NVivo</td>
<td>✔ MAY 15th</td>
<td>Started transcriptions May 1st and finished May 15th</td>
</tr>
<tr>
<td>Accuracy check and memoing</td>
<td>Allow for one week</td>
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</tr>
<tr>
<td>First cycle analysis (list specific steps you will complete)</td>
<td>Allow for two-three weeks</td>
<td></td>
</tr>
<tr>
<td>Second cycle analysis (list specific steps you will complete)</td>
<td>Allow for one week</td>
<td></td>
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</tbody>
</table>
Thematic Analysis

Three-step process:

1. First round of analysis
2. Second round of analysis
3. Theme identification and cross-checking
First Round of Analysis

- Reading & initial ideas
- Initial analysis
- Define labeling
Inductive 1st Round of Analysis

1. Identify codes in an emerging nature
2. Group units of data according to patterns of like-meaning
3. Theme identification and cross-checking

Become familiar with the data

Identify relevant segments of data

Assign meaning to segments of data (coding)
**RQ1:** How do international students at a US research-oriented university perceive and describe their speaking and listening experiences with PechaKucha Presentations in their EAP program?

<table>
<thead>
<tr>
<th>David Interview #2 Zoom</th>
<th>Codes: Orange = emotions</th>
<th>Green = practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 15, 2020 8:30am</td>
<td>Blue = planning</td>
<td>Purple = changes made</td>
</tr>
</tbody>
</table>

**First round of INDUCTIVE analysis**

When I just got that assignment about the PK presentation because they're PK presentation is like the timed presentation so, I feel really overwhelmed that I like, oh, can, can I do that like?

You know, I just only memorize all of the screen and and just speak out, like, almost by reading them. So it was quite hard for me to give a really natural presentation By just checking the time like in within the 20 seconds or like 30 seconds.

I prefer I prepare some script and then I needed to read following this script, but It was quite hard to like to present all of the entire contents within the time so so after we just read about the essay we just wrote, we were going to do the presentation.

After I prepared the slides I do, I tried to use, I tried to just make a script based on the, Like I sometimes just copy and paste the essay, and then I sometimes just made different words and then changed the words to make more short time to present to the audience.

Sometimes I made some self-recorded video to show myself. to show or to just see myself.

**Overwhelmed feelings**

**Planning? Memorizing - Reading Speaking - “just speak out”**

**Difficult process (Time) & “Natural presentation”**

**Planning to Speak**

**Hard – present all content & time**

**Planning process**

**- write script - Copy & paste from essay**

**- changes made - time?**

**Practice?**
Deductive 1st Round of Analysis

1. Identify ‘relevant’ segments of data
2. Assign the ‘relevant’ data to one of the framework categories
3. Start with definition of theory or guiding framework

Top Down

1. Use of preexisting categories
2. Group units of data according to patterns of like-meaning
3. Identify the nuances of meaning that emerge each group
**Q1:** How do international students at a US research-oriented university perceive and describe their speaking and listening experiences with PechaKucha Presentations in their EAP program?

<table>
<thead>
<tr>
<th>Deductive Coding</th>
<th>Deductive Codes: Language Anxiety Theory</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Red</em> = anxiety (fear, nervous, worry, apprehension); <em>Dark Orange</em> = effects of anxiety (forgetting info, speaking quickly, repetitious speech); <em>Green</em> = strategies to deal with anxiety</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Interview Notes</th>
<th>Analysis</th>
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<tbody>
<tr>
<td>When I just got that assignment about the PK presentation because they're PK presentation is like the timed presentation so, I feel really overwhelmed that I like, oh, can, can I do that like</td>
<td><strong>Anxiety</strong> - Overwhelmed feelings (Time)</td>
</tr>
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<td>You know, I just only memorize all of the screen and and just speak out, like, almost by reading them. So it was quite hard for me to give a really natural presentation by just checking the time like in within the 20 seconds or like 30 seconds.</td>
<td><strong>Strategy</strong> – memorizing&lt;br&gt;&lt;br&gt;<strong>Anxiety</strong> – “Hard” – Difficult process (Time)—emerging sub-code?</td>
</tr>
<tr>
<td>I prefer I prepare some script and then I needed to read following this script, but it was quite hard to like to present all of the entire contents within the time so so after we just read about the essay we just wrote, we were going to do the presentation.</td>
<td><strong>Strategy</strong> – using script&lt;br&gt;&lt;br&gt;<strong>Anxiety</strong> – “Hard” – Difficult process (Time)</td>
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<td>After I prepared the slides I do, I tried to use, I tried to just make a script based on the, Like I sometimes just copy and paste the essay, and then I sometimes just made different words and then changed the words to make more short time to present to the audience.</td>
<td><strong>Strategy</strong> – deliberate changing of words</td>
</tr>
<tr>
<td>Sometimes I made some self-recorded video to show myself, to show or to just see myself.</td>
<td><strong>Strategy</strong> – Practice</td>
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</tbody>
</table>
Breadcrumbs and Memoing

Breadcrumbs are notes to help future you remember your thoughts and ideas at the end of an analysis session.

Examples:
• I ended with Maja’s transcript. The ideas of ______ were really strong. I wonder if these ideas are coming to me because I have experienced them too?
• I combined the codes of ______, _____, and _____ because I realized they all had to do with parents’ perceptions. I named this grouping parent perceptions for now. I will likely need to start subcoding to distinguish between different meanings.
• I have identified at least one turning point for José, Hector, and Raul. I need to think about how to represent the narratives.
Second Round of Analysis

Combining

Looking for patterns

Intentional Decisions

Refining Understanding
Inductive Second Round of Analysis

1. Identify codes in an emerging nature
2. Group units of data according to patterns of like-meaning
3. Theme identification and cross-checking

Group codes
Revise understanding

Bottom Up
RQ1: How do international students at a US research-oriented university perceive and describe their speaking and listening experiences with PechaKucha Presentations in their EAP program?

### SECOND ROUND OF INDUCTIVE ANALYSIS

#### Overwhelmed Feelings

<table>
<thead>
<tr>
<th>(DAVID) When I just got that assignment about the PK presentation because they're PK presentation is like the timed presentation so, I feel really overwhelmed that I like, oh, can, can I do that like that [timed presentation]?</th>
<th>Overwhelmed feelings - Due to PK format</th>
</tr>
</thead>
<tbody>
<tr>
<td>(DAVID) it was quite hard for me to give a really natural presentation [due to reading the words] By just checking the time like in within the 20 seconds or like 30 seconds. It was quite hard to like to present all of the entire contents within the time.</td>
<td>Difficult process (Time) &amp; “Natural presentation” Hard – present all content &amp; time (PK format)</td>
</tr>
</tbody>
</table>
| (DAVID) it might happen like I'm sometimes I feel really nervous or just my mind could be paralyzed, so, yeah, it was my kind of worries or concern. When I just gave a presentation to the audience in the public, I cannot. I cannot just make a really natural conversation. Mm hmm. And Yeah, my mind was just paralyzed. | Felt nervous - “mind could be paralyzed”
  - self-expectations/perceptions?
  - Public speech |
| (DAVID) I always just feel nervous when just by my turn is usually supposed to be the last turn, I usually feel really nervous. [when I had to present second] Um, I was literally just freaked out. Yeah, I was freaked out, I was really in a state of panic! | Nervous - Order of presentation Panic |
| (DAVID) And I think when I feel nervous or when I am in a state of panic, I used to just speak really fast, and just, you know, there. I just got lost my words. | Nervous – effects of being nervous |

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Deductive Second Round of Analysis

1. Use of preexisting categories
2. Group units of data according to patterns of like-meaning
3. Identify the nuances of meaning that emerge in each group

Identify patterns within categories

Begin to compare data with framework meaning
<table>
<thead>
<tr>
<th>SECOND ROUND OF DEDUCTIVE ANALYSIS</th>
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<tbody>
<tr>
<td>GREEN = Strategies to handle anxiety</td>
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</table>

| (DAVID) You know, I just only **memorize** all of the screen and and just speak out, like, almost by reading them. I prefer I prepare some script and then I needed to read following this script | **Strategy** – memorizing |
| | - Preferences |
| | - **Strategy** – using script |

| (DAVID) After I prepared the slides I do, I tried to use, I tried to just make a script based on the, Like I sometimes just copy and paste the essay, and then I sometimes just made different words and then changed the words to make more short time to present to the audience. | **Make script** |
| | **Strategy** – deliberate changing of words to address time requirement |

| (DAVID) Sometimes I made some self-recorded video to show myself. to show or to just see myself because it is kind of timed presentation | **Strategy** – Practice – for time management? |
| | - Video record to self-assess? |

| (DAVID) I just try to Be the first presenter. | **Strategy** to overcome nervousness – when to present |

| (DAVID) Oh, If I don't have enough time to speak my whole explanation in a time, I just used to delete some words or sentences that is not necessary. | **Delete words/sentences to address time** |

| (DAVID) So, oh, and I use those kind of things that Ms. T said if we if we are really nervous, we can just look at the [audience's] forehead, Mm hmm. And then either be like kind It seems that we look at the audience. | **Strategy** to combat nervousness + addressing audience |
Deeper Understanding of the Data by Clustering

<table>
<thead>
<tr>
<th>Participant</th>
<th>Quote</th>
<th>Original Code</th>
<th>Meaning</th>
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Breadcrumbs and Memoing

Breadcrumbs are notes to help future you remember your thoughts and ideas at the end of an analysis session.

Example:

- I combined the codes of ______, _____, and _____ because I realized they all had to do with parents’ perceptions. I named this grouping parent perceptions for now. I will likely need to start subcoding in to distinguish between different meanings.

- In the group of emotions, at least three different reasons for those emotions are emerging in the data: time requirement, forgetting due to public speaking,
Third Round of Analysis

- Theme identification & definition
- Data reduction
- Cross-checking
Inductive Third Round of Analysis

1. Identify codes in an emerging nature
2. Group units of data according to patterns of like-meaning
3. Theme identification and cross-checking

- Determine the meaning within the large groups of data
  - Identify the nuances of meaning (subthemes/topics) in groups
  - Determine what data stay and what data are not needed
- Determine theme names based on nuances of meaning and organization
- Define each theme based on the nuances of meaning and organization

Inductive Analysis
Bottom Up
Deductive Third Round of Analysis

1. Use of preexisting categories
2. Group units of data according to patterns of like-meaning
3. Identify the nuances of meaning that emerge in each group

- Identify patterns within categories (subcategories)
- Determine which data will stay and which data are not needed
- Compare data with framework meaning
- Determine if the data warrants a change to the framework category names or definitions
<table>
<thead>
<tr>
<th>Cluster – Emotions</th>
<th>Meaning</th>
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</thead>
<tbody>
<tr>
<td>Allie - Yeah, before a presentation in person or anything like before a quiz or anything, I can remember that information, but during the thing, a quiz time or a presentation, I might forget. Because I know I am afraid; I'm nervous and confused.</td>
<td>Forgetting info due to nervousness, afraid, confused</td>
</tr>
<tr>
<td>Allie - So to be honest, in the beginning of doing the presentation, I was so shy of like, I don’t like presenting in front of people, but after doing like, after doing a lot of practice for time management, each slide, that helps me somehow like I can talk in front of people without being shy.</td>
<td>Feeling shy</td>
</tr>
<tr>
<td>Allie - The first presentation, I had two days to do it, so I did it fast. During those two days, I had so many assignments, so I had to do it at last minute. That day, I really suffered, I did not sleep well, ‘cause I was trying to manage the time to do this presentation</td>
<td>Overwhelmed due to demands of college</td>
</tr>
<tr>
<td>Ashley - And when I was working through that class, I was, um, prepar[ing] for the presentation, I just, I was seeing the information, um, to, um, to save the information. But, um, during the class I was a little nervous, so I just forget some, um, information.</td>
<td>Forgetting info due to nervousness</td>
</tr>
<tr>
<td>Ashley - After the presentation. I felt, um, I speaking very well, but in, in, during the presentation, um, I forget, um, some information because I was a little nervous.</td>
<td>Forgetting info due to nervousness</td>
</tr>
<tr>
<td>Ashley - It was first starting [time] that I had to present It was this one week. So I have to search for an interesting topic and I have to do the PowerPoint and a half or a break and I have to record myself. SO it was really difficult. Let me think about that video. I think I was too much, literally, because Was too much. So yeah, I was thinking too much with me one of the problem. too much too fast</td>
<td>Overwhelmed because too many tasks at once</td>
</tr>
<tr>
<td>Ashley - It was a little difficult because I just learn some new words. So it was hard for me to pronounce the words, so I was, unprepared for the new words and how to pronounce them to the audience.</td>
<td>Difficulties pronouncing</td>
</tr>
</tbody>
</table>
I. Feelings of Emotions
A. Negative experiences related to being overwhelmed
B. Negative experiences related to struggling with speaking in English as a second language
C. Negative experiences related to speaking in public (nervous or fear of public speaking)
D. Negative experiences related to forgetting information (worried or nervous because they forget information during presentations)
E. Negative experiences related to struggling with the PK requirements (number of words, transitions, and time)

II. Use of Cognitive Processes During PK Presentation
Processes
A. Making meaning as an audience member
   1. Remembering due to relevance of topic
   2. Ways of making meaning as audience member
      a) Visuals
      b) Words
      c) Listening
   3. Speakers' pronunciation as barrier to meaning making as audience member
B. Making and Conveying meaning as a speaker
C. Cognitive acts to make and convey meaning
   1. Gathering information
   2. Identifying important information
   3. Memorizing information
   4. Adding information to help audience (remembering info + vocab development

III. Development of Strategies through PK Presentation Experiences
A. Tools as Strategies
B. Strategies to Combat Emotions
C. Strategies to Remember
D. Practice as a Strategy
   1. General information about the amount of time used to practice
   2. Data about using practice to overcome emotions
   3. Data about using practice to meet PK timing requirements

IV. Perceptions Related to Presenting and PK Presentation Experiences
A. Perceived Expectations
B. Perceptions of Others' Performance
   1. Data on what they paid attention to
   2. Data on rating others' performance
C. Perceptions of Own Performance
   1. Perceptions of speech
      a) How participants perceived their rate of speech
      b) How participants perceived their accuracy of pronunciation
      c) How participants rated their speech performance
   2. Perceptions of presentation in general
      a) How participants rated their posture
      b) How participants rated their appearance
   3. Perceptions of PK presentation
Breadcrumbs and Memoing

Breadcrumbs are notes to help *future you* remember your thoughts and ideas at the end of an analysis session.

Examples:

• The groups of ________ and _______ seemed very close, so I combined them and broadened the theme name. *This adjustment made sense because ....*

• I am struggling to determine the theme name of the grouping related to communication. Communication will likely be in the name, but the name needs to be more meaningful.

• After realizing the challenges of ____________ included a lack of belonging, I think that lack of sense of belonging might be one of my conclusions for RQ2.
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Demonstration

Laura Lagendyk
Session 3: How NVivo can be used for your coding strategy

Sample Project: Environmental Change Down East
Organizing Codes (inductive, deductive, by question)
Working with Codes (moving codes, coding stripes, highlighting)
Visualizing your Data

Resource links:
• Thematic Analysis using NVivo (on demand webinar: Watch Here)
• Visualizing your data using NVivo (on demand webinar): Watch Here
Demonstration

Stacy Penna, Ed.D.
Integration of Citavi and NVivo

- Finding and organizing secondary literature
- Outlining
- Task planning
- Writing your paper

- Literature reviews
- Taking notes

- Analysis of primary research
- Coding
- Transcription
- Data visualization
Publishing Process with Citavi and NVivo

The Publishing Process

Collect Sources → Organize → Literature Review → Note Taking → Collaborate → Writing and Citing → Publish

Secondary Sources

Citavi Picker → Reference Management & Task Planner → Knowledge Organizer → Annotations → Citavi Collaboration Tools → Citavi Word Add-In → Citavi Enhanced Referencing

Primary Sources

NVivo - Office Integration → Data Files and Code Hierarchy → Analyze References and Data → Memos and Annotations → NVivo Collaboration Tools → Export Codes and Memos → NVivo Visualizations

Streamlined With QSR Solutions
Questions
Resources

Materials taken from our on-demand course, “How to Write a Literature Review”

Dissertation by Design Services:
1. One-on-one dissertation coaching
2. Statistical consulting
3. Professional Editing
4. On-demand courses
5. Doctoral Writing Community
Writing Process with Citavi and NVivo

The Writing Process

Collect Sources | Organize | Literature Review | Note Taking | Collaborate | Writing and Citing | Publish

Citavi Picker | Reference Management & Task Planner | Knowledge Organizer | Annotations | Citavi Collaboration Tools | Citavi Word Add-In | Citavi Enhanced Referencing

Citavi Desktop - Citavi BDServer - Citavi Cloud

NVivo - Office Integration | Data Files and Code Hierarchy | Analyze References and Data | Memos and Annotations | NVivo Collaboration Tools | Export Codes and Memos | NVivo Visualizations

NVivo Desktop - NVivo Transcription - NVivo Collaboration Cloud and Server

Streamlined With QSR Solutions
Try Citavi Today!

Citavi 6 for Windows Trial or Citavi Web Trial for Windows and Mac
https://www.myqsrportal.com/shop/trial

Learn More

Citavi Community Forum

Join the 400 Universities that Already Have Citavi Licenses
Customize NVivo To Suit Your Needs

The research process:
1. Collect Data
2. Transcribe
3. Manage and Analyze
4. Collaborate
5. Enhance

NVivo Integration for Word, Excel and Outlook
NVivo Transcription
NVivo (desktop)
NVivo Collaboration
NVivo Learning Journeys

- Pay As You Go
- Unlimited Use
- NVivo - Windows
- NVivo - Mac
- Collaboration Cloud
- Collaboration Server
- Certification
- 1:1 Coaching
- Onsite Workshops

Trial NVivo Solutions Today
NVivo Resources

Free Resources

- Customer Hub
- Help Menu
- On Demand Webinars

NVivo Academy

- NVivo User Certification Course
- Focused Learning Course - Coding
- Virtual Training & Consultancy
- Certified Expert Course
NVivo Community - Connect With Fellow Researchers

Share and Learn

- Qualitative Analysis and Writing Webinars
- NVivo Podcast

Connect

- NVivo Research Networks
- NVivo Community Forum

Funding Opportunities

- Access to Research Grants

Join the NVivo Community