



First coding

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First coding

Most (but not all) qualitative researchers wish to code data. Coding has both an organizational and an analytic role. It is one way to manage data and store knowledge gained from the documents, or interpretations made. Once stored, coding is easily retrieved. Qualitative researchers have many ways of coding which we discuss later (Part 4). But almost all use coding to identify topics, themes or issues, and bring together the data segments where these occur. When this was done manually, it was a formidable, tedious task. NVivo does it as you think, by making nodes for topics, and storing there the references to text coded at that topic.



Nodes out of data

If you coded manually before using software, you probably did it by making notes or colored marks in the margins of text, or by photocopying documents, then cutting out the segments about a topic to store in (named) files. You could then find all the blue margin marks, by rereading and looking for blue. Or more efficiently, you could go to the container that had all the photocopied snippets, to read everything stored about

that particular topic. When you found some more, it was copied and added to the container for that topic.

In NVivo, the “containers” for coding are nodes. You make a node for each topic or concept to be stored. But you code by placing at the node not segments of data but *references to* the data about that topic. NVivo is not cutting documents up or copying that text across to each node. That could be problematic since nodes (like filing cabinets!) would fill up. Also, since a document can be freely changed, the text at the node could be out of date. Whenever you ask NVivo to browse the node, it quickly finds all the text that node has references to. If you change the structure or size of your document, NVivo will automatically update the references it has stored at nodes and find the correct text. More importantly, those snippets are not cut away from the original—you can see them in context, if necessary returning to the whole document.

Coding “up” from your project journal

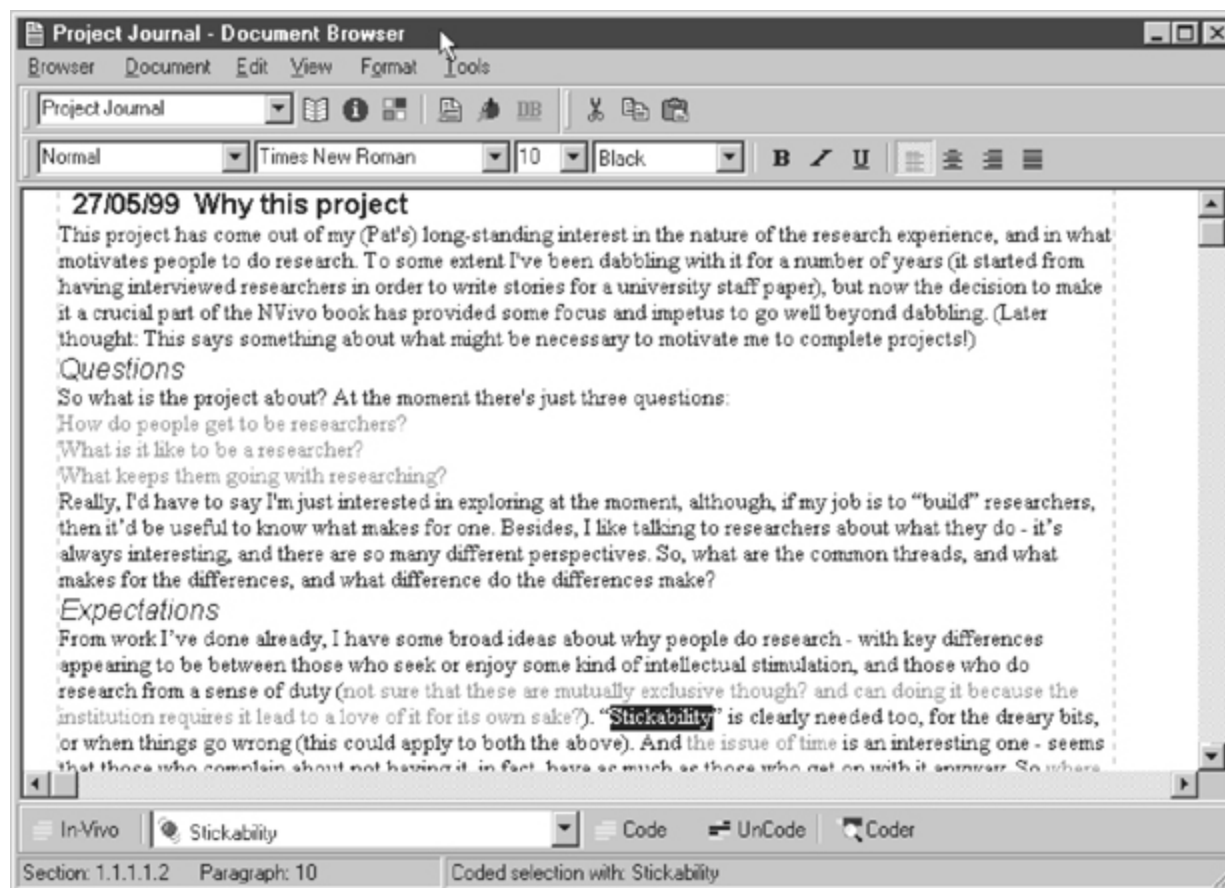
When writing a first document, you will have mentioned some topics or categories of significance to the project. You will want to capture further data about these, to view all the data on a topic, and to ask questions about how topics are related. Creating nodes for them will allow you to do this.

The simplest way to code “up” from the data is to name the category with a word in the text that is interesting or that triggers thinking. The node named “live” from the text is called an “in vivo” category. Code at that node every time this word occurs, with the context it occurs in, and you can explore its recurrences and meanings. In some methodologies, this sort of coding is paramount. The term “in vivo coding” comes from grounded theory, but of course creating a node from the text can be used in any method, as a quick way of naming a node.

Making In-Vivo nodes



- In the Project Pad, click on Browse, Change, Link and Code a Document, to browse your Project Journal; or, Explore all Project Documents and select it and click Browse in the Document Explorer.
- Read the thoughts you recorded in your journal. Find a word or phrase for a topic you would like to develop or explore in your project.
- Highlight the word or phrase.
- In the Speed Coding Bar at the bottom of the window, click on In-Vivo.
- The word or phrase you had highlighted appears, with a Free Node symbol, in the Speed Coding slot next to In-Vivo.
- The status bar immediately below tells you that the selected text has been coded with a node of that name. The location of any highlighted passage also shows in the status bar.



You have created your first node! Note it was created as a Free Node. NVivo provides several types of nodes for keeping track of emerging and developing ideas, and for organizing data. Free Nodes do not assume relationships with other concepts, so they are particularly useful at the beginning of a project. Nodes can also be organized into “Trees” to express relationships of topics and subtopics, or grouped as Cases. These will be discussed in Part 5.

Working with retrievals

Coding using a computer allows retrieval of the text that was coded—instantly! At any stage you can view what is coded at a node in a Node Browser, which shows where the coded text was from, and how much of it there is. The Node Browser looks very similar to the Document Browser, with a Speed Coding Bar at the bottom. This is a different sort of browser, however—not for editing text, but for reading what was coded, for reviewing and reflecting, and perhaps for recoding into finer categories.

Retrieving what you have coded...



- On the Project Pad, click on the Nodes tab (next to Documents, near the top-left).

- Click on Browse, Change, Link and Code a Node. The dialogue will list the In-Vivo nodes you have made.
- Double-click the node you wish to view, or select it and click OK.

...and seeing it in context

Hmmm. What you have retrieved is probably just a single word. There will be times when you look at coded text, stripped of its context, and wonder why it was coded there, or what it meant. You can view the immediate context of a coded segment, or alternatively, jump to the source document.

- In the Node Browser, highlight the coded text.
- From the context (right mouse) menu, choose View Enclosing Paragraph.

NVivo will show the whole paragraph, with the additional text in a different color from the words initially coded there. Bringing in additional text like this does not mean that the extra text has been coded at the node—just that you can see more clearly where the extract came from.

If the enclosing paragraph is insufficient for your needs:

- Put your cursor in the coded text, and from the context menu select View Enclosing Section.

This is likely to be as far as you need to go, but if the passage is a sub-section of a larger section, repeating this action will bring in the larger section, and again, until you reach the highest level of section—which is the whole document!

...optionally code additional context at the current node

To extend the coding to include all or part of the context shown:

- Highlight the additional text you wish to code at the node, and
- Click Code or press Enter (the node you are browsing is already showing in the Speed Coding Bar).

Uncoding can be performed in a similar manner.

...or return to the original document

There are many reasons why you might want to go back to the document a coded segment came from—even if the context was adequately coded. Perhaps this segment gets you thinking about the document again? Perhaps you now see how different this person's response was from others' coded at the node? The coded segment shown in the Node Browser was not severed from its place in the document.

- In the Node Browser, place your cursor in the passage of interest.
- From the context menu, choose Browse/Edit/Code Document (the first option).

The full document will be retrieved in a Document Browser with the coded passage highlighted. Now you can rethink, recode, or edit the document as you wish to store your new ideas.

Note the node you came from is showing in the Speed Coding Bar of the Document Browser. So you can immediately code some more text there if you wish:

- Highlight the extra text.
- Click on Code.

The additional text will be coded at the node that was showing in the Speed Coding slot. The status bar will record that you have coded text at that node, and the Node Browser for that node immediately updates.

More Free Nodes

Often you will want to store ideas at new Free Nodes with names that are not in the text. Doing so is delightfully (perhaps dangerously!) simple—as simple as typing a name for the new node.

These techniques quickly create nodes “up” from the data. They are often “eruptions” from the document. They serve to store surprises, hunches, odd phrases, things that might matter. Thus a node serves many purposes. Simply by thinking “that’s node-worthy” you create a category. If these things recur, coding at the node will track their occurrences. Now, when you come to more data about the same topic, you will have a place to store it—where you can find it again. Moreover, the nodes you have give a growing picture of what’s happening in the project. If they prove of no interest, they can simply be deleted.

Free Nodes with new titles



- NVivo will make a Free Node for that category, and will indicate in the status bar that the selected text has been coded there.

This time, when you retrieve the text coded at the node, you will find there is more than just the title of the node stored there.

Coding at a recently-used node

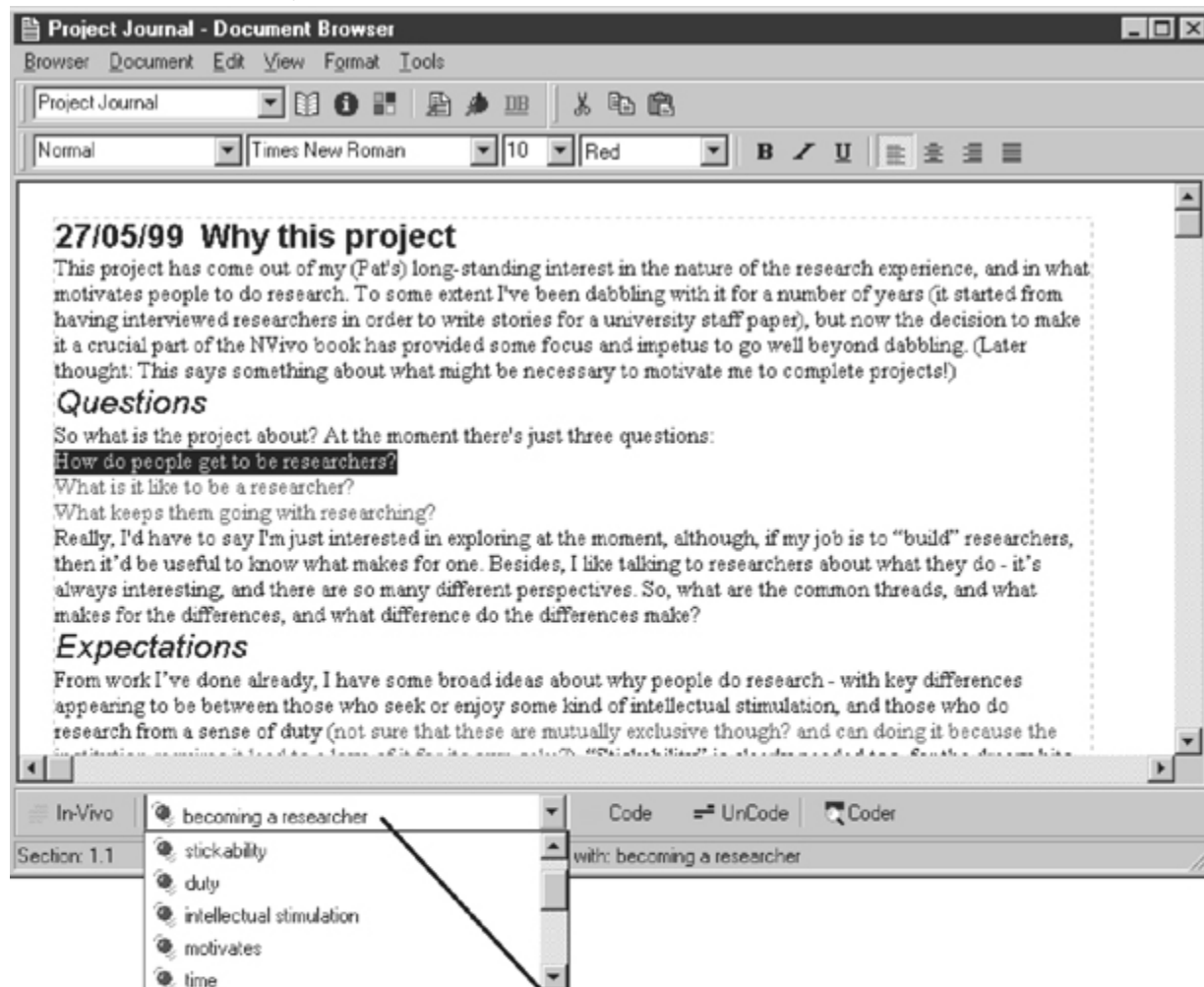
Coding brings material together on a topic. Soon you will find a second passage to be coded at a node you have already created. If that node is not currently showing in the Speed Coding slot:

- Highlight the passage.
- Click on the arrow at the right side of the Speed Coding slot to access a list of Recently Used Nodes.

- Select the desired node from the list, then click Code.

Alternatively:

- Retype the node title into the Speed Coding slot and press Enter on your keyboard. Make sure you spell it correctly, or NVivo will create another node with the misspelt title!



Type in the title of a new (or existing) free node, or select a recently used node from the drop down list

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Viewing coding

Once coding is under way, it helps to see what coding you have done! How has this document been coded so far? Or what other nodes code the text you are viewing at this node? You can view this graphically in live

“stripes” alongside a document or the text coded at a node in either Browser

View coding stripes

- From the View menu in the Document or Node Browser, choose Coding Stripes. Colored bracketing, with node titles, appears alongside the text, indicating where it is coded, and at which nodes.
- As you add more coding, this will be shown in more or extended “stripes”. Note that you will often have more than one stripe against a passage, indicating there are multiple nodes coding that passage.



NVivo's stripes in the live Browsers take a lot of computer memory, so if memory is a problem on your computer it is a good idea to turn them off whenever you are working intensively with a document or node, particularly if you are editing a document or coding on from a node. Turn them on again when you wish to check where you're up to.



Browse through the project journal, and highlight a word or phrase that might be used later to “tag” some data of interest. Click on In-Vivo in the Speed Coding Bar to create a Free Node with that word or phrase as a title. Now extend the highlighting to capture the whole question or comment, and click on Code (the appropriate node should still be showing in the Speed Coding slot). Maybe there are some further nodes you can make in this way. Or you may want to re-use a node you have already created: find it by clicking on the arrow next to the Speed Coding slot to bring up the list of Recently Used Nodes.

Try creating a Free Node by highlighting a passage and typing a title. Click on Code or press Enter on your keyboard. Use Coding Stripes to see what text you have coded, and review the text you have coded at a node by calling up the Node Browser for that node.

Exploring nodes

The Node Explorer offers an overview of all the nodes in a project, and access to those nodes. From the Node Explorer, you can edit the title of a node, record additional descriptive information about a node, or create a new node.

Explore and retrieve

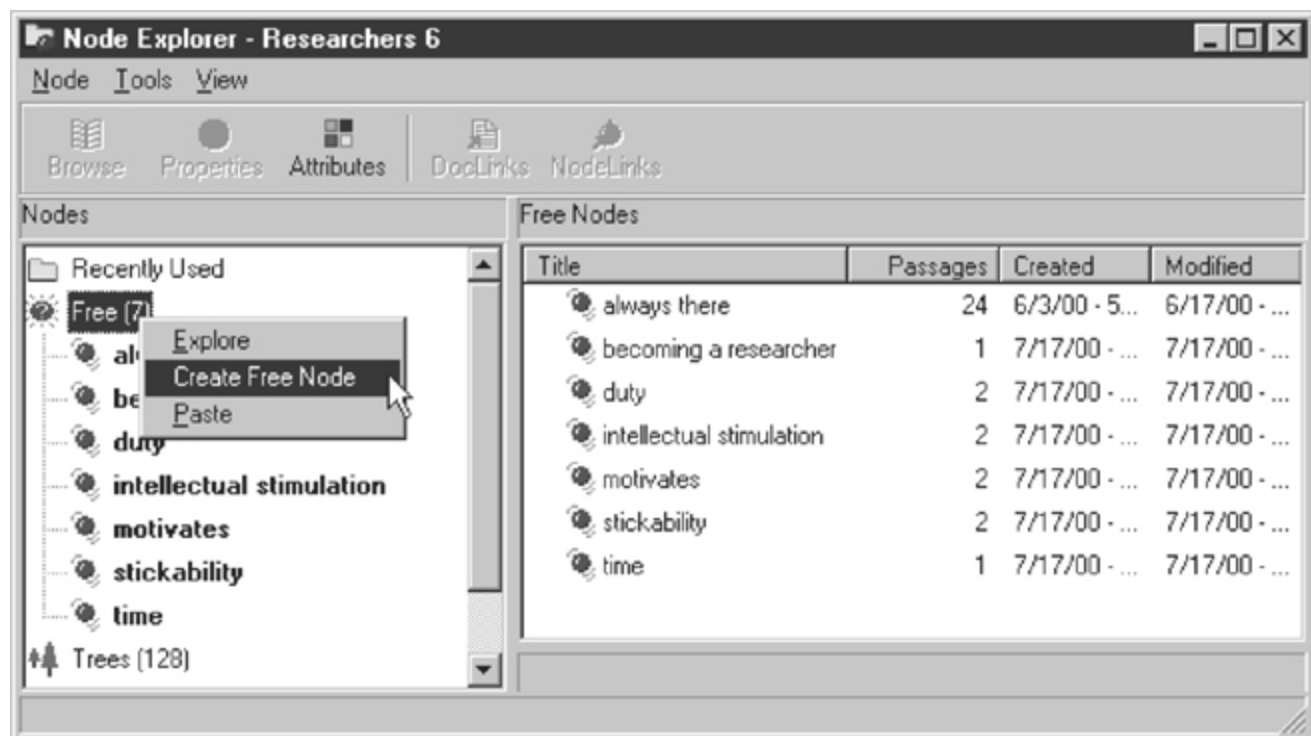


- From the Project Pad, select the Nodes tab.
- Click on Explore all Project Nodes.
- The Node Explorer will open. Areas for storing the several types of nodes (Free, Tree, Case) are shown on the left of the Explorer window. For the present we are interested only in Free Nodes.
- Double-click on Free, to see a list of your Free Nodes.
- All Free Nodes are listed in bold type, which indicates that each has coding. The right pane of the Node Explorer tells how many passages are coded at each node, when each node was created and when it was last modified.
- Go to the Node Browser either by double-clicking a node (in the right pane of the Explorer), or (in either side of the Explorer), by highlighting the node title and clicking Browse.

Create a node without coding

Think about another topic you want to consider in this project. You can create a new node while in the Node Explorer, without coding text at it yet. For now, keep all these nodes in the area called Free, as they are free of organization or structure.

- Highlight Free in the left pane of the Node Explorer.
- From the context menu, choose Create Free Node. A new Free Node (with the title Free Node) will be created and highlighted.
- To rename it, click on Free Node (it will change to edit mode) and type in a new title. The new node title is presented in regular rather than bold type, because there is no coding at this node.



Record a description

You can record a description to define the concept, say why you have made this node, or what is to be coded there.

- While the node is highlighted in the Explorer, or open in the Browser, click on the Properties icon in the toolbar, or, select Inspect/Change Node Properties from the context menu (Explorer only).
- Type a description into the Description slot of the Properties dialogue. Note that you can also edit the title of a node through the Properties dialogue.
- Close the Properties dialogue. When that node is selected in the Explorer, the description will show in the lower right pane.

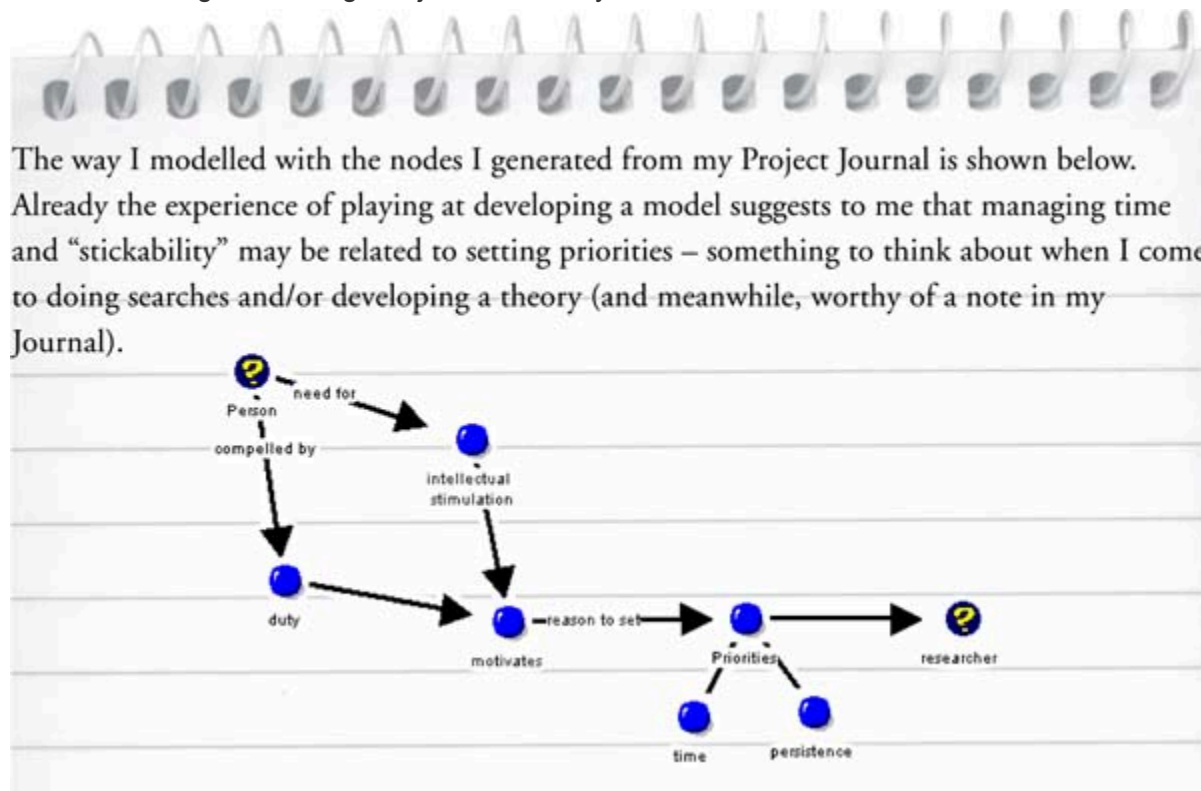
Nodes in models

At this stage you might return to your model, to explore relationships between your original ideas and the nodes you have created from your journal, and to add to or refine your first attempt by using those nodes. The items you put in a model are “live”—with a click of the mouse you can jump directly back to the data referred to.

Adding nodes to a model



- From the Project Pad, select Create and Explore Models. The Model Explorer will open on a new model or, if you have a saved project, the model you started at the end of Part 1. Expand the window.
- Click on the Nodes icon in the toolbar, or, from the context menu select Add Node. Select the nodes you want, one at a time. As you select each one, it will appear in the model and be added to the list of the model's items in the left pane of the Model Explorer.
- Rearrange the early ideas and added nodes, to picture how they relate to each other and to the Project Journal document you added in Part 1. Add links, and delete or change the appearance of items as required.
- To jump from the model to the document or data coded at any node, from the context menu select the option to Browse/Edit/Code it. The Document Browser or Node Browser opens, ready for more thinking and coding—or just to remind you of what it was about.



Saving your project

If you have the full software, this is a good time to re-save the project by going to the Project menu (at the top of the Project Pad) and choosing Save Project.

Taking stock

NVivo's database is now quite complex. It contains only one document but also some links, a growing model, many nodes and some coding at them.

Significantly, the database has grown before you introduced any of the sorts of documents conventionally called “real data” (interviews, field notes, etc.). In your own project, you may wish to create more new documents to record your observations, field notes or interviews. Or you may import such “real” data from rich text files: we will do this in the next section. But note much can (and often should) be achieved in the early stages by logging and exploring first thoughts.

In presenting the first stages of a project this way, we aim to alert researchers to the ways NVivo supports what we have learned are crucial reflexive techniques in qualitative research. The software will not stop you if you work in a more linear way, importing all your “real data” in a batch, *then* coding all the documents, *then*, and only then, thinking about the ideas represented in the coding, and the data coded there. But we share an experience of working with researchers that has convinced us that working linearly almost always creates problems for qualitative analysis. If you hear a qualitative researcher ask: “Now I've coded all my data, what do I do?” you know they are in trouble. As they were coding their data there were very many other things they should have been doing that would assist them in drawing conclusions from their data, things that may be hard to regain later.

By contrast, you have created a starter project that is holding and representing what you are learning in several ways. A visitor to this project could find easily how it had started, trail its progress and view its current development. If you continue to work this way, moving between tools to explore and express ideas, the project will be understandable and your conclusions justifiable to your audience—and yourself!

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