



Making data

In: The NVIVO Qualitative Project Book

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Pub. Date: 2011

Access Date: May 25, 2020

Publishing Company: SAGE Publications, Ltd

City: London

Print ISBN: 9780761970002

Online ISBN: 9780857020079

DOI: <https://dx.doi.org/10.4135/9780857020079>

Print pages: 35-48

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Making data

In Parts 1 and 2 you began a project with first thoughts and growing ideas. To do this, a new document was created in NVivo's editor. If data is building up in field notes you may continue to create documents this way. But most projects also require some data documents that were first created in other software—a word processor or database program, or an email provider or scanner. Such documents may be transcripts of an interview or focus group, or copies of historic records or correspondence.

In this Part we make data in several ways; by typing in, by importing and by making proxy documents that represent and link to data. Whichever way you choose to make a document, it is a rich text file, and you can edit it, link it to other documents, files or ideas, store information about it, code it and search it for patterns and relationships in your data.



Early data documents

For documents like those so far in your project, there is little effort and a considerable advantage from having the text in your project database. But such documents need not be restricted to obvious project items like the project journal or interviews. If you haven't yet begun to make data, you can (and should!) still make a start on your project, by viewing the literature about your topic as data. If you have a word processor file on your literature, a download of literature details from a website or library search, or output from a bibliographic database, import it as shown below.

Most researchers create data as they reflect on the research experience, (field notes, reflective notes, notes about reading or observation records). Some researchers have only this sort of data. You may be studying, say, the culture of a professional practice or the movement of a patient through a hospital system. Observations create different sorts of data from recording interviews with professionals. You may wish to start a document called Weekly Observations and type into it each time you note something (dating the entry). When you remember another event, drop back into that document and add to it.

Notes from observations and records of “casual” conversations may be supplemented by interviews or focus groups. (For some types of data, good notes from interviews are likely to be as useful as full transcripts, and they will be a lot easier to manage and absorb.) These too may be typed up in NVivo, or prepared in a word processor.

Edit or import?

How to decide whether to type up data in a program outside NVivo? The advantages of doing so are that word processors have some functionality not present in the NVivo editor, for example, a spelling checker, word count and thesaurus, as well as greater flexibility in using styles. On the other hand, an advantage of typing directly in NVivo's editor is that there will be no compatibility problems, and, as we saw in Part 1, you can code as you write.



If you save a file in your word processor, then import it, you can keep the word processor file as a back-up copy. If it was created in NVivo, you will need to make a text report of it, or go back to it in a backup of the database to find a back-up copy.

Appendix B provides additional notes about preparing documents for easy processing in NVivo.

Importing a document

For documents prepared outside NVivo, a minimum of preparation is required. Documents prepared in a word processor are saved in rich text format in Word if you want to preserve the styles and formatting applied to the text, or they are transferred from other programs via WordPad (note that WordPad preserves formatting but not styles). Documents in plain text format can be marked-up to allow NVivo to identify the name, description

and sub-headings (see the Appendix). Any document can be freely edited after it is in NVivo.

A document needs a name. If you are importing, NVivo can take the name from the source file name, or it can be typed into the document. A document can also have a description, and subheadings that define sections in the document, as well as text.

The document name and description can be changed at any time, using the Document Properties box. In the Browser, subheadings can be added at any time, as can further text.

Import a rich text or plain text document into NVivo



- Decide on a document to import: a first interview transcript, a memo to your supervisor, or simply a document written in a word processor for this exercise. Make its first paragraph a description, and use subheadings to identify useful sections (e.g. for questions or speakers). Save it in the Source Documents folder of your project, selecting rich text format (.rtf) or text only (.txt) in MSWord, as appropriate.
- From the Project Pad, select Make a Project Document.
- In the New Document Wizard, select the first option, to Locate and import readable external text file(s).
- Navigate to where your file is located. (If it is a plain text file, select Text Files (*.txt) in the file format slot in order to see it.) Select the file, and click Next.
- NVivo asks how to find the name and description the document will have in the project. Usually for a rich text document you will choose the first option, taking the name from the file and description from the first paragraph.

NVivo will copy the document into its own database, leaving the original unchanged. You may wish to move the original document to a back up area.

View the document in NVivo

- Browse the document: from the Project Pad click Browse, Change, Link and Code a Document and select your document, *or*, from the Document Explorer, select your document and click Browse.

The Document Browser opens, and you now have live access to the text of the document, to read, edit and code.

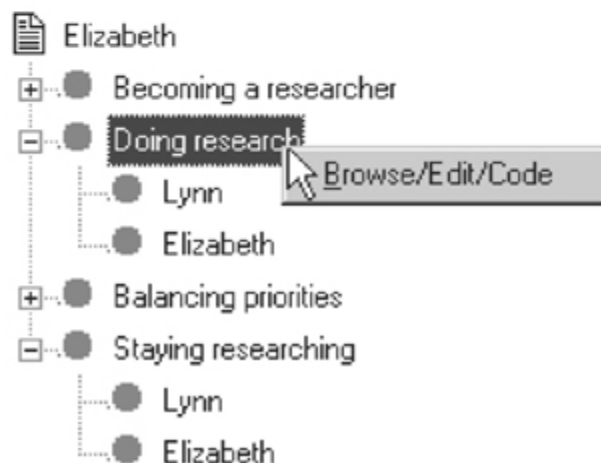


To move straight to a particular section of a document: in the Explorer, highlight the document in the

left pane, and in the right pane highlight a section heading. Click the right mouse button and select Browse/Edit/Code. The Document Browser will open at that section heading.

Follow the instructions above to locate and import Elizabeth.rtf from QSR Projects\Researchers 1\All Users\Source Documents. Leave the first option selected in the Obtaining document name and description box, so that the source file name becomes the document name and the first paragraph its description. Click Finish.

Open the Document Explorer (from the Project Pad, Explore all Project Documents), and highlight Elizabeth under All Documents. The structure shows in the right pane of the Explorer. Open the document Browser at one of the section headings. From the Edit menu, choose Select Section, and the highlighting will extend to include all the discussion for that section (for both speakers).



Proxy documents

The third way of making a document is the fastest—tell NVivo to make a “proxy document” for some data you don't want to import, or can't. This can be as simple as a heap of photos, or as complex as a videotape. NVivo offers either a proxy that is linked to a file somewhere else in your computer (by name only), or one for non-file data. And it offers either a blank document or one whose formatting gives you a structure or template to type your summaries or comments into.

New Document Wizard : Proxy Type and Name - Researchers 6

Please describe your data source.

New Document

Type: Audiotape

Location: Group of people
Computer file
Paper
Newspaper
Magazine
Book
Map
Photo
Box of papers
My thoughts
Videotape

Name for this: green filing

Name: Fir

Description: Audiotape
Not sufficient material to warrant full transcription
Poorly recorded

< Back Next > Cancel

Creating a Proxy

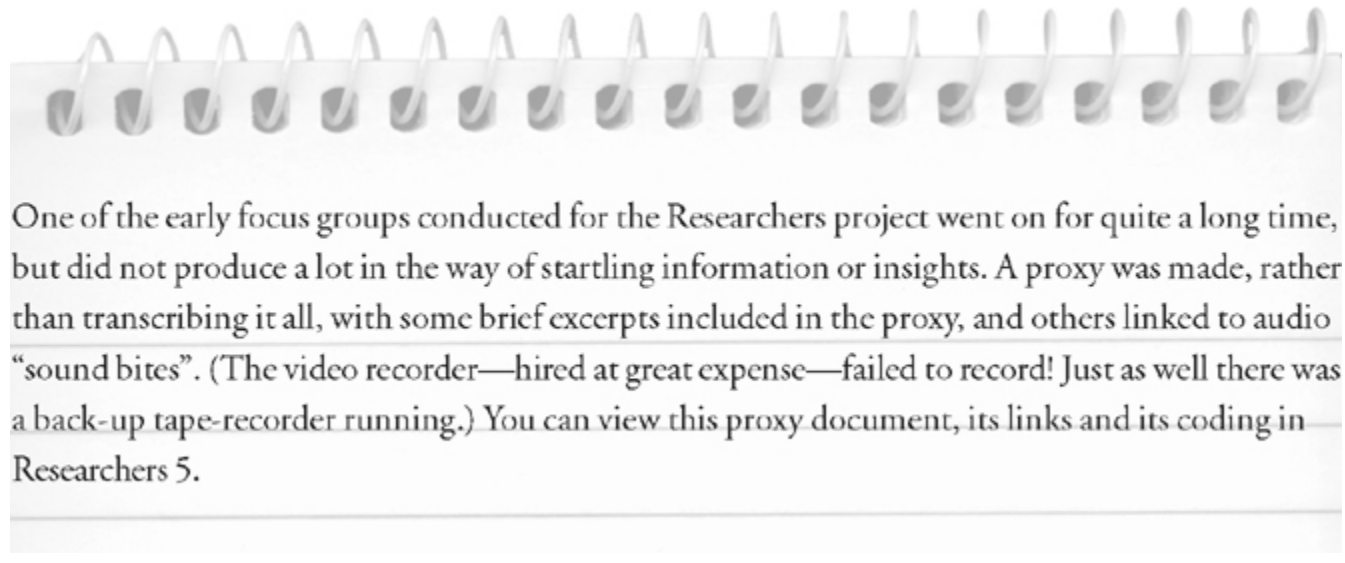


Whichever way it is made, the proxy document is a rich text document where you can edit ideas and summaries, place links to external data and code.

If you have data requiring this sort of treatment, for example, a report to summarize, a heap of newspaper cuttings, a set of photographs or a focus group not worth transcribing:

- In the New Document Wizard, select the third option, to Make a Proxy Document for non-file data. Click Next.
- Specify the name and description and click Next.
- The dialog asks if you want a formatted proxy. Choose the option to have numbered paragraph headings and in the adjacent slot, select the relevant one (e.g. for a report, pages or chapters; for a focus group, tape count numbers or minutes). Indicate what the starting and finishing numbers will be, and click Finish.

- The document opens. Type your summary of the report or what happened in the focus group into the relevant places according to chapter or tape numbers—or simply leave the numbered paragraph headings as placemarkers for coding. Use External DataBites to link to small audio or video clips from the tape if you want to retain magic moments!



Attributes and values

There are things you “know” about characteristics of the sources of the data such as people's gender, the dates of events, locations of sites. Such information is contextually relevant for everything that is written or said. NVivo stores this information as *attributes* of either documents or nodes. Attributes can be used to filter and search data. Thus, for example, providing the relevant attributes and coding have been recorded, one could ask whether there is a gendered response to an issue, or whether the style with which something is done differs across sites or periods.

It is easy to set up and assign attributes to documents or nodes, as you work out what information might be useful for later analyses. Or, when this information is known in advance, and applied to many data items, it can be recorded in and imported from a spreadsheet or database (i.e. any table-based software). Importing attributes using a table is outlined below (Part 8).

Attributes are specific to the project. When documents or nodes represent people, demographic details are likely to be attributes (gender, age, role). Where documents are field notes, then their attributes may include place and time. If a project includes more than one type of data, an attribute for data type will allow comparison of what you have on an issue from different sources. If a node codes all the data about a case (see Part 5), it can be given the attributes of that case.

Attributes have values as specified by you. Sometimes these are obvious in advance (gender will have values of female and male). Sometimes new values are created as the data determines (you discover the many different roles of people in a hospital ward). Attributes can be given string values, that is, any word or

combination of letters and numbers you type in. Or the value will be Boolean (True or False) for example, for the attribute “Has doctorate”? Age and income (if treated as continuous values) are numeric; “Beginning of event” requires a date or time. You choose the value type.



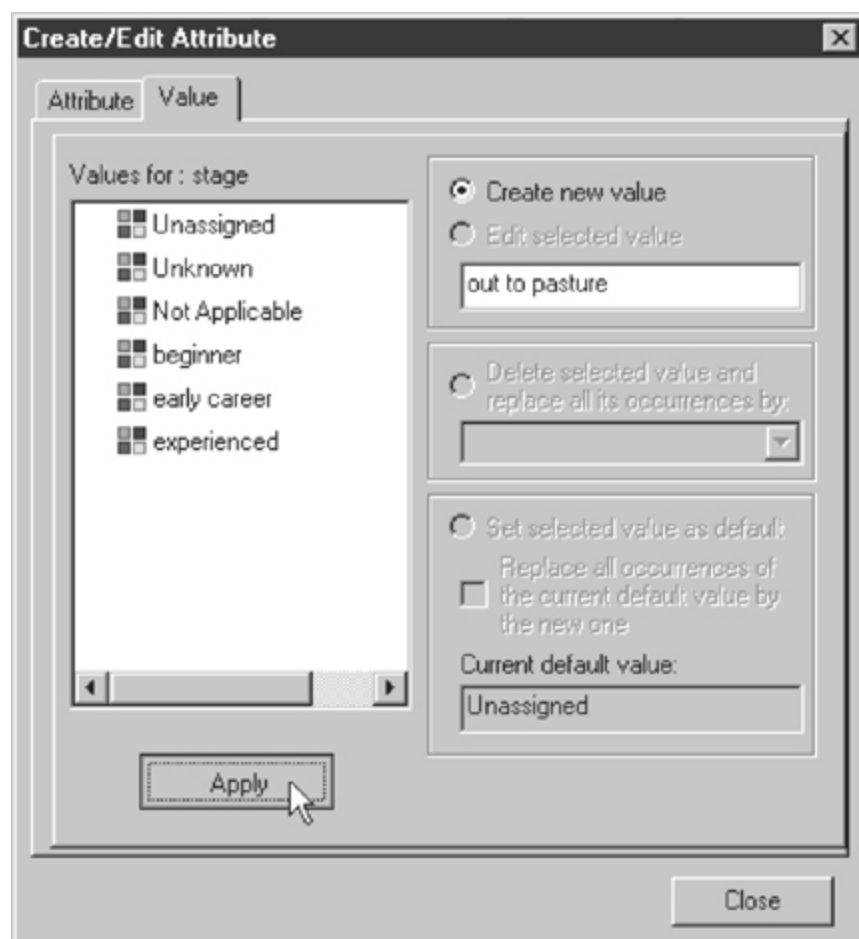
Document and node attributes are handled identically. If the people or sites you are studying are represented in only one (whole) document for each, assign the attributes to the document. (We will do this in the Researcher project, where each interviewer “is” just one document, and the focus group participants are not studied as individual cases.) But if a person or site is “spread” across parts of several documents, you would give them a node, and assign their attributes to that node (see Part 8).

Creating attributes and values



- On the Project Pad, click on Make or Change a Document Attribute.
- In the Create/Edit Attribute dialogue, click in the slot to type the new attribute name.
- Type a name for the attribute and press Enter (or click Apply).
- Note: If you are creating a Boolean (True/False), numeric, date or time attribute, change the default Value type from String, before pressing Enter.
- Type names for further attributes, choosing a value type and pressing Enter after each one.
- Highlight one of the string attributes you have created. Click on the Value tab.
- Type in the values you wish to use for that attribute, pressing Enter after each one.
- To create values for another attribute, first click on the Attribute tab of the dialogue, highlight that attribute, then click on the Value tab and continue as before.
- Close the Create/Edit Attribute dialogue.

There are always three pre-assigned values for any attribute: Unassigned, Unknown and Not Applicable. These importantly distinguish three different reasons why you may not have the information to record a value. The default value is Unassigned, unless you alter it.

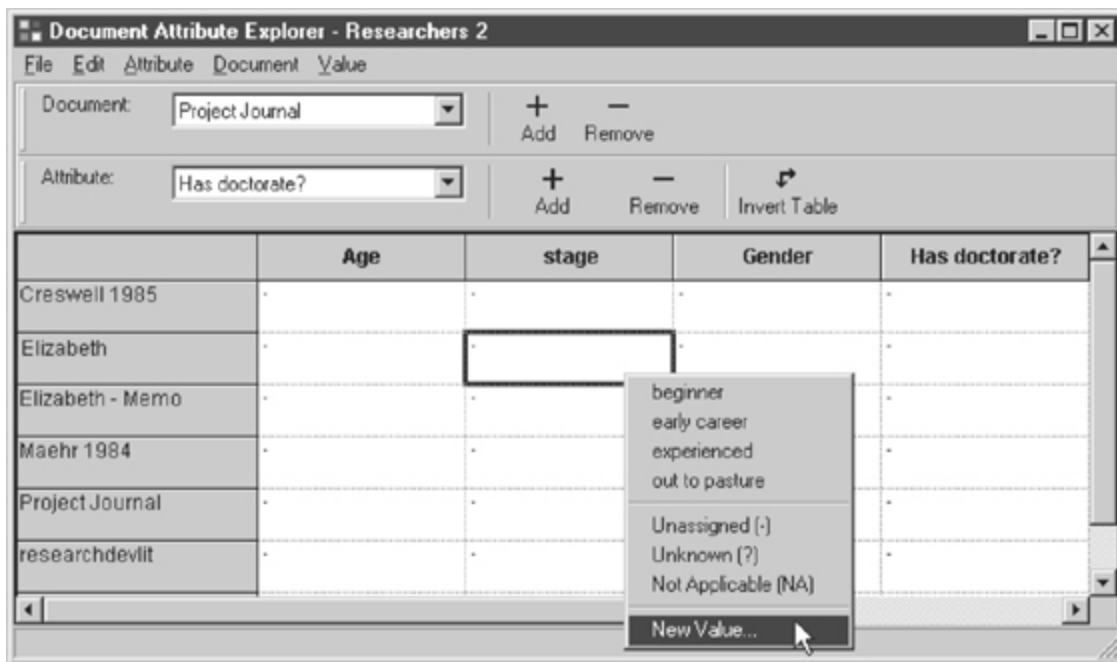


Exploring attributes and assigning values



Attribute data can be added, edited or reviewed at any time. Once Document Attributes have been created, they are available for application to any document.

- From the Project Pad, choose to Explore all Document Attributes. A Document Attribute Explorer will open showing a table that lists all documents and all attributes. “Hover” over a cell, to see the value (for each at present this is Unassigned).



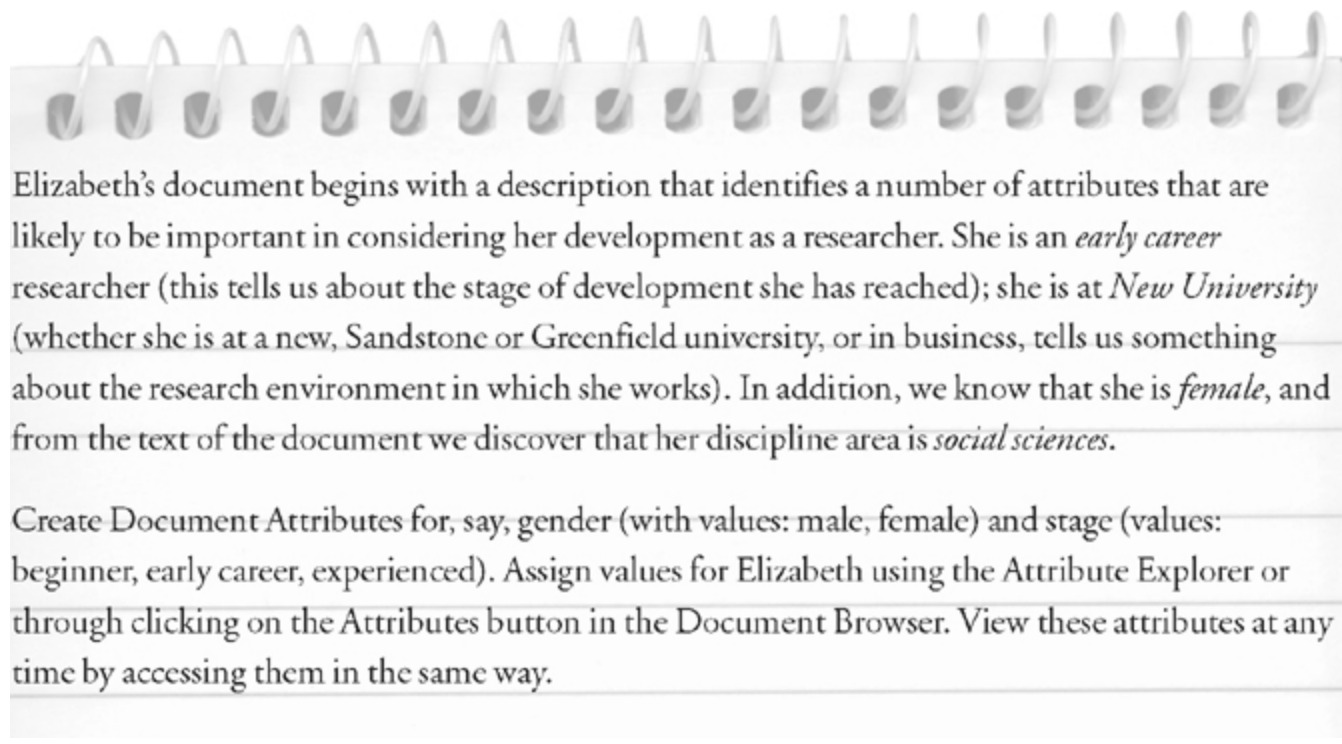
- Click on a cell and click the right mouse button. A list of the values created for that attribute shows in the pop-up menu.
- Choose the value to apply for that cell. If the appropriate value is not available, select New Value, type its name and click OK.
- Continue in this manner for as many cells as you need to fill.



Check the menubar options. You can customize this table, adding or removing from it (not from your project!) particular documents and attributes. You can also sort the attributes by type, or the documents by their values on an attribute.

Values can be entered “on the run,” i.e. as you are working through a document, if the information becomes available in that way.

- Select Browse a document
- Click on the Attributes icon  in the Document Browser toolbar. A “mini” attributes table for just that document will open.
- Create attributes and/or add attribute values as they become known.



Links to Memos (and other documents)

Qualitative researchers usually want to link documents in their project to each other. This may be simply to remind that another document is related. Or it may be to create and edit notes that record growing ideas about data or concepts or research procedures. These are usually called memos.

Any document may be linked to any other documents, or to any place in the text of a document, by what NVivo refers to as a “DocLink”. Documents may also be linked to nodes. “Top-level” links—from one document to another—are mutual, each document showing the link. “In-text” links are just one way, since there may be very many of them.

Creating and using memos

A memo in NVivo is any document to which you give that status. Create a memo by making a new document and clicking This document is a memo in its property box, or, by making a DocLink from an existing document (or node) and clicking Link a New Memo. This is a normal document so if you wish, you can code it too—either later, or as you write it. It can be renamed, described, searched and edited like any other document, and it too can hold links to external data (DataBites) or other documents (DocLinks).

A memo may be a major think-piece about theory, possibly the first document you write, and not linked to any other data. Or, it can be just a reminder to yourself about things that draw your attention, queries raised in your mind, things you want to follow up, *linked* to the data it is about. If you are dealing with interviews you might write a memo about your recollection of the interview situation. It is useful to read quickly right through

the transcript before looking at the text in detail, and then to record a memo about key points raised and other thoughts the document has stimulated. Memoing helps to focus attention prior to undertaking detailed analysis of the document, when you can easily lose yourself in particulars and miss the focus of the whole. The summary remains as a reminder thereafter of what that document was primarily about.

Linking from the text to an existing document

In Part 1 you used DataBites to link text to *external* data. DocLinks can link from a place in the text to *internal* documents. At any place in the text you might wish to be reminded of related material, or make a memo. For example, you might wish to record some insights gained from your new data document in your Project Journal, and to place a link there that will take you directly to the new document.

Link text to a document



- Browse your Project Journal.
- Add to it a note about the document just imported. With your cursor at the end of the note (don't select any text), click on the DocLinks icon  on the toolbar.
- A box opens entitled In-text DocLinks from [document name]. All project documents show in the left pane. Select the one you want to link to, and click the arrow to show it in the right pane (Documents linked). Click Close.

The DocLinks icon now shows in the text.

- Click on it and right mouse button to see what's linked there (or to return to the Add/ Remove dialogue).
- To go to the linked document, select it and left-mouse click.

Linking a new memo

Sometimes the appropriate link is not from a place in the text but from the document at the top level, for example, to link to the whole document a memo about it. When you place a DocLink you are given the choice of whether it is at top level or from a place in the text. In either case, there is an option to link to a new memo. Choose this, and a new document is made. The default name given to the memo (e.g. Elizabeth – Memo) reflects both its source and its special status as a memo. You can, of course, change that name. You can also change the status of the document so it is no longer a memo (via the Properties dialogue).

Creating a memo



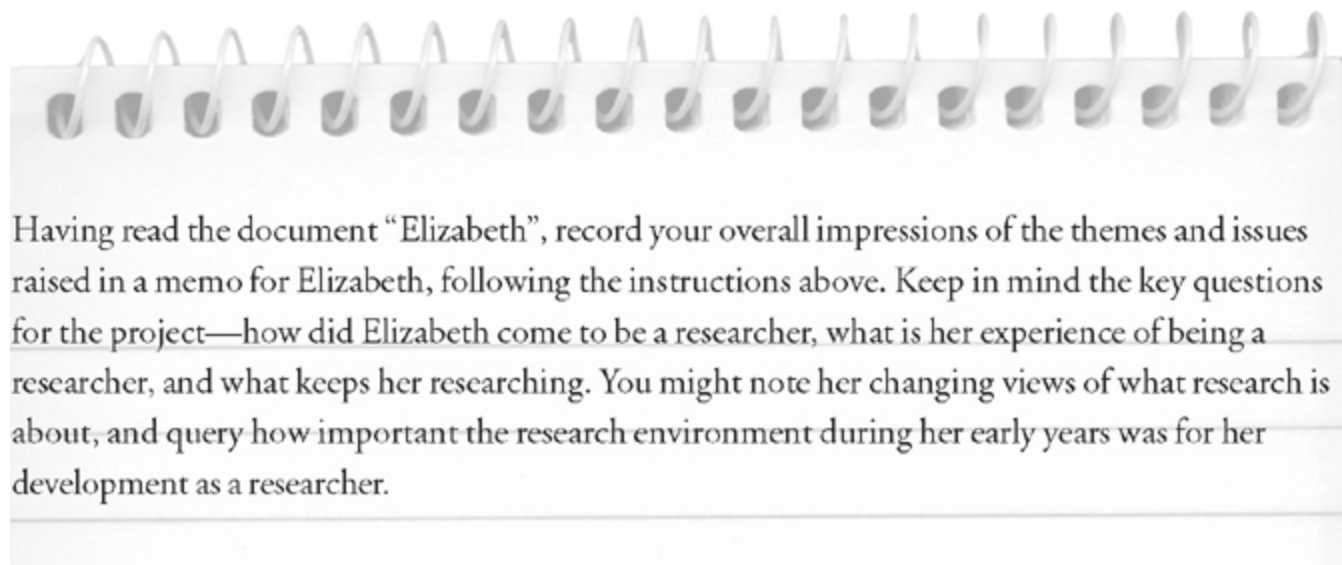
- Select your data document in the Document Explorer.
- Click on the DocLinks icon on the toolbar.
- The dialogue is set to Show top-level DocLinks.
- Select Link a New Memo. A new Browser window will open, titled [Your-document-name] – Memo. (Note: This is another way of making a new document!)
- Type any questions or preliminary understandings of processes which were prompted by reading this document.
- Close the memo. Close the DocLinks dialogue.
- The new memo is now listed in your Document Explorer, with an icon showing it is a memo . It is a full status document, so can be renamed or given a description. To do this—or change its memo status!—select it in the Document Explorer and click Properties. Note that in the Properties dialogue, This document is a memo is checked.

Accessing the memo

- Access the memo from the Document Explorer in the same way as any other document: select it and click Browse.
- To access the memo from the Document Browser, click on the DocLinks symbol (or select DocLinks from the context menu), Show top-level DocLinks, and Browse Document. *Or:* Switch to the memo by selecting it from the Document List in the slot at the top left corner of the Browser's toolbar.
- You can access the original document from the memo in the same way. The memo and the original document have the same status as documents and the link is symmetrical. Each “knows” it is linked to the other.



You can create a top-level DocLink from the Browser too: just click the DocLink icon and click Show top-level DocLinks, then proceed as above. But note that for top-level DocLinks the icon does not show in the text: if you wish to be reminded that there is a memo about this document, simply edit that into the top of the document! You can of course create an in-text DocLink at this note to allow you to jump immediately to that memo. NVivo will allow any number of links to a document from the top or from any place in the text.



Taking stock

Your project in NVivo now has a database that is complex but relatively orderly. As the data documents “come in” you can record things you know about them and ideas you have about them. You could keep building data up in this way for some time without losing the immediate knowledge and first responses that are critical in qualitative work. Some researchers will continue to work this way for most of the project; their strategy is to gather material with regular, rigorous storage of information and ideas. But most researchers will want also to record the ideas that come to them about particular pieces of data, and the categories that “emerge” as they read the data. To do this, you are likely to want to do more detailed commenting, linking and coding. Part 4 is about working with data using these tools.

<http://dx.doi.org/10.4135/9780857020079.n3>