

NVivo Planning Worksheet

This planning guide is designed to be used alongside the training offered by Academic Consulting and Research Accelerator. It is not a 'how to' guide, but instead offers a series of prompts and questions to help ensure your NVivo project is set-up in the best way possible. The functions mentioned below are not an exhaustive list of NVivo's functionality, but instead cover the main functionality you should be considering at the planning/set-up stage of your project. If you are unfamiliar with any of the terms used below, refer to the Academic Consulting/Research Accelerator training manuals and/or the NVivo help files.

If at any time you struggle to answer the questions below, it may not be your knowledge of NVivo that is the issue. The use of NVivo requires a good understanding of research design and qualitative or mixed methods approaches – it may be worth revisiting this before proceeding with the software.

© 2025, Academic Consulting.

Before you begin...

What are your research question(s)?

Do you have a good understanding of qualitative approaches, and in particular, the data analysis process?

An understanding of qualitative approaches will be essential as NVivo will not perform the analysis for you – if you answered 'No' we recommend doing some reading in the area before beginning.

☐ Yes ☐ No

Do you have the NVivo software installed?

Most larger organisations have licences you can access. The latest version of the software is NVivo 15. It would be best to access the most recent version if possible, but note that some universities are still using earlier versions. Windows and Mac versions are available, and if you need to purchase it, you can do so at:

<https://lumivero.com/products/nvivo>.

☐ Yes ☐ No

Initial project set-up

Where will you save your NVivo project?

Ensure your project is either saved somewhere that is backed-up automatically or make sure you have a good back up system in place.

 NVivo projects are just regular files and can be moved, backed-up, attached to emails etc., just like normal files. They have a *.nvp (Windows) or *.nvpX (Mac) file extension.

What types of data will you include in your project?

Options include Word documents, PDFs, surveys, audio, video, images, websites, social media, email, information from notetaking apps or literature/reference information.

Have you checked whether the data you're importing requires a particular format?

*For example, if you wish to use the 'auto coding' function of NVivo, your transcripts will need to be formatted in a specific way. Excel files also need to be structured in a particular way for NVivo to read them correctly, and there are a number of other considerations for different data types. You should also check whether the file format of your data is compatible with NVivo (e.g. image files need to be *.bmp, *.gif, *.jpg, *.jpeg, *.png, *.tiff format).*

☐ Yes ☐ No

If 'Yes', summarise below what the requirements are and what steps you'll need to follow to ensure they are formatted appropriately.

Will you need to check your data before importing?

If you have outsourced your transcription or data preparation we highly recommend checking the accuracy of this before importing – with any data analysis software it will be a case of 'garbage in, garbage out'. Importing from reference management software is another example where it might be worthwhile checking the accuracy of the information beforehand, especially if you have imported your references automatically.

☐ Yes ☐ No

What convention(s) will you use to name your files?

We recommend keeping this simple and consistent across all files. Some researchers like to include a code in each filename for basic demographics (e.g. Interview 1 M 25–34 Auck to indicate a 25–34 year old male who lives in Auckland). This can be useful, but don't let your file names get too long, and keep in mind that demographics can be saved elsewhere in your NVivo project.

Will folders be useful to organise your data?

Folders are useful for organising larger amounts of data (you likely won't need them on a smaller project). You could create folders for different data types, geographical sites, time periods or anything else that would be useful for your project.

☐ Yes ☐ No

If 'Yes', indicate below what folders you'll create in your project.

Will you keep memos in your project?

Memos are for your own thoughts and reflections or as a record keeping tool. Example memos are a research journal where you record all the actions you've undertaken in your project, memos about interviews you've conducted (which contain notes you've taken in the field), or memos relating to analysis issues such as reflexivity.

☐ Yes ☐ No

If 'Yes', indicate below what types of memos you'll create in your project.

What data analysis approach will you use for your coding?

There are many different approaches to qualitative data analysis. Some examples include thematic analysis, grounded theory, content analysis, discourse analysis, general inductive approaches and narrative analysis. Decide up-front which approach is best suited to your research questions and wider methodology.

What approach will you take to create codes in NVivo?

Will you create codes ahead of time and then code (a deductive approach), create codes as you go (an inductive approach) or perhaps a combination of both? Your decision here will be influenced by your answer to the previous question regarding data analysis. If you're following a data analysis approach that encourages line-by-line coding (e.g. grounded theory or thematic analysis) you may find it more efficient to do this initial coding outside of NVivo and then bring your codes in once you've started to move through the later coding stages of your approach (i.e. once your codes are a little more "consolidated").

What coding technique will you use in NVivo?

There are many different approaches that can be used e.g. drag and drop, right-click, the code panel, code options from the NVivo ribbon, and using the quick code button (Mac only). Select a technique that suits your working style and keep in mind that you might use a mix of different techniques within a single project.

Do you know at this stage what some of your codes might be?

Don't worry if you don't, but if you have some ideas jot them in the space below.

Do you intend to keep a codebook in NVivo?

*A codebook is a list of your codes with descriptions – they're a useful tool to ensure you code consistently throughout your project which is useful for ensuring rigour. If you're planning to keep a codebook, ensure that you enter descriptions for each of your codes as you create them (there is an option for this in the dialog box when you create a code). If you need to add a description later, simply right-click on the code and choose **Code Properties** (Windows) or **Get Info** (Mac) to access the dialog box.*

☐ Yes ☐ No

If 'Yes', how often will you export your codebook from NVivo (this will provide a useful audit trail of your analysis?)

At what stage(s) will you review your codebook/coding framework?

It's always a good idea to stop and periodically review the codes you have in your project – do you have too many or too few? Have descriptions been entered for all codes? Do any codes need moved, merged or deleted? Make a plan for when you'll engage in this review process and jot this down below – it might be at the end of the first week of coding, after the first 2–3 files have been coded, or another stage that is suitable for your research and data analysis approach.

Next steps in NVivo

The cases and classifications discussed below can be created at any stage of the analysis process – they don't need to be created at the outset (we actually create them just before we start running queries for example). But, it's worth planning ahead for this from the outset of your project, so even if you don't plan to set them up initially, do think at the project set-up stage about what cases, classifications, attributes and attribute values might be relevant for your project. It's also useful to consider at the early stages, what other functionality in NVivo might be helpful for your project e.g. queries, visualisations or diagrams. You don't necessarily need to learn these skills immediately, but it's always helpful to be thinking towards the latter stages of your analysis.

Do you need file classifications?

File classifications are mostly used in queries if you want to compare across data files. They are typically used in projects that are document based such as policy analysis or literature reviews. If you want to be able to compare older versus newer documents, different types of documents, or documents published in particular areas of interest (for example), then you need file classifications.

☐ Yes ☐ No

If you need file classifications, what will your attributes (and attribute values) be?

Example file attributes (and attribute values) are year of publication (2010, 2018, 2021 etc.), reference type (book, journal article, conference proceeding etc.), and country of origin (New Zealand, UK, Australia etc.). Enter some ideas for your project into the boxes below.

Classification(s)

Attribute(s)

Attribute value(s)

Do you need cases and case classifications?

Cases relate to your wider research design – a case is a concept that we're often aware of outside of NVivo. When considering what a case is in NVivo, think about what you want to make comparisons on – are you wanting to compare people, organisations, events, products or something else? Often file classifications will not work in these scenarios which means we need to add an extra step in our process – creating cases in NVivo. Think of a case as a box that contains all the data that relates to that particular person, organisation etc. of interest.

☐ Yes ☐ No

If you need cases, what will these be?

For example people, organisations, events, products or something else?

If you need case classifications, what will your attributes (and attribute values) be?

Example case attributes (and attribute values) are gender (male, female, gender diverse etc.), age group (20–29 years, 30–39 years etc.), and country of birth (New Zealand, UK, Australia). Enter your ideas in the boxes below.

Classification(s)

Attribute(s)

Attribute value(s)

What other NVivo functionality might you need for your project?

- ☐ **Word frequency** and **text search queries** can be useful as data familiarisation techniques for investigating patterns in your text-based data, and looking to see if you've missed any coding. The word frequency query can also be used when you're coming up with ideas for your codes.
- ☐ **Coding, matrix coding** and **crosstab queries** are useful for sub-group comparisons, looking for overlaps in coding and many other things.
- ☐ **Mind maps** are a helpful brainstorming tool when you're developing your codes.
- ☐ **Project maps** are a useful way to display your coding structure.
- ☐ **Concept maps** can be helpful when you're thinking through the findings, relationships, patterns etc. from your analysis.
- ☐ **Charts** are a quick way to view coding based on a particular file, code or attribute (amongst other things).
- ☐ **Explore diagrams, comparison diagrams** and **cluster analysis** can be useful for looking at patterns in your coding.
- ☐ **Reports** (Windows only) can be useful if you need to extract information from your project to show another researcher who is not familiar with NVivo.

NVivo teamwork

In addition to the above questions/prompts above, there are a number of additional factors that must be considered when using NVivo in a team.

How will you work with NVivo as a team?

- ☐ **NVivo standalone** – only one person can access the project file at one time
- ☐ **NVivo standalone with project merging** – individual team members have their own version of the project which is then merged
- ☐ **NVivo Cloud Collaboration** – individual team members have their own version of the project which is shared with NVivo Cloud Collaboration (note: an additional license is required for this option)
- ☐ **NVivo Collaboration Server** – the server version of NVivo which allows multiple people to work on a project at one time (note: an additional license and installation is required for this option)

What version of NVivo will be used?

All team members need to be on the same version of NVivo. Ideally everyone will also be on the same operating system i.e. Windows or Mac.



There is no backward compatibility with NVivo 14 or earlier.

What process will you use to create your codebook as a team?

When working as a team in NVivo, it is best to decide on your codebook/coding framework ahead of time, particularly if you are planning to use project merging (in this situation the coding framework will need to remain relatively unchanged throughout the coding process i.e. no new codes added, moved etc.).

What other protocols will you implement as a team?

For example, if working with transcripts, no changes should be made to individual data files once they have been imported to NVivo. Consider also what processes you'll use for merging e.g. how often will project merging occur and how will projects be sent to the project manager? What process will you use if new codes need to be added to the project? What roles will individual team members have e.g. who is responsible for updating the coding framework, who will perform project merging if required? How will inter-coder consistency be developed e.g. via coding stripes, coding comparison query, something else?

How often will the team meet?

Team meetings are important to review progress, discuss possible changes to the coding framework etc. We also recommend having a 'Not sure' code in the project that team members can code to – this code can be reviewed/discussed at team meetings.