Software Manual - TAP
Thematic Analysis Program
Welcome to Joanna Briggs Institute’s

Thematic Analysis Program
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1.0 Introduction to JBI and Thematic Analysis Program (TAP)

The Joanna Briggs Institute (JBI) is a major international agency for evidence-based health care and a part of the University of Adelaide, Australia. The Institute aims to facilitate evidence-based practice globally through being a leading international organization for the Synthesis, Transfer and Utilization of evidence about the feasibility, appropriateness, meaningfulness and effectiveness of health care practices through:

- developing methods to appraise and synthesize evidence, conducting systematic reviews and analyses of the research literature (evidence synthesis),
- globally disseminating information in diverse formats to inform health systems, health professionals and consumers (evidence transfer),
- facilitating the effective implementation of evidence and the evaluation of its impact on healthcare practice and health outcomes (evidence utilization).

The Joanna Briggs Institute Thematic Analysis Program (TAP) is a simple online tool designed to assist researchers to analyze small qualitative datasets following a three-step process of entering data, categorizing data and building themes.

The three-step process facilitated by TAP involves the extraction of qualitative data (such as statements or text); categorizing these extractions on the basis of similarity in meaning; and then organizing these categories thematically to form representations of the data.

There are a number of sophisticated electronic packages designed to assist researchers to conduct thematic analysis on large qualitative data sets. TAP is designed for use in small-scale studies and is now available exclusively via JBI at LWW which you can access at  http://evidencebasedpracticenetwork.nursingcenter.com
2.0 Analyzing Qualitative Data

Qualitative data analysis is complex and is generally based on a specific qualitative research tradition or methodology such as grounded theory, ethnography or phenomenology. The interpretation of the data is influenced by the research methodology, but many qualitative approaches to the organization of the data and its analysis essentially focus on deriving explanations, understandings or interpretations of the interviews with study participants or the events or phenomena investigated through:

- closely examining the words and their meanings through reading and re-reading the text; and
- the sorting of data into themes.

Thematic analysis is not congruent with some qualitative methodologies such as discourse analysis or conversation analysis, however finding themes is common to most methodologies. Thematic analysis has been described as the “identification of what, and how frequently, concepts occur in texts” and the term “theme” “is used in a loose, general way for analyzing patterns in text”. Qualitative data – elicited through interviews, group discussion, or observation – is generally captured in the form of transcripts. The data itself consists of words that relate to the understandings and activities of people or of symbols and objects that people attach meaning to. Thus qualitative data is usually made up of what people have said or done and the transcripts of audio recordings or field notes of observations represent the “raw” data to be analyzed.

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2.1 The TAP Approach to Thematic Analysis

TAP utilizes an easy-to-use, three-step approach to assist researchers in examining “text” to identify findings as they emerge from the raw data. The approach involves repeated, in-depth reading of the text. Qualitative analysis requires the researcher to search for the meaning embedded in the data and this begins with detailed study of the text to familiarize the researcher with the content and to generate understandings. The researcher then engages in:

1. Identifying and extracting illustrations from the text

When the researcher is familiar with the text, ‘illustrations’ (which take the form of phrases or segments of the text) are extracted.

2. Creating categories

When ‘illustrations’ from all cases in the study are extracted, they are assembled and then grouped in ‘categories’. The researcher identifies and defines ‘categories’.

3. Building themes

When all ‘illustrations’ have been assigned to ‘categories’, these ‘categories’ are assembled and examined closely to identify similarity in meaning between them. ‘Categories’ are then grouped, on this basis of similarity in meaning, into ‘themes’.

TAP enables researchers to construct a TAP Chart that visually represents the relationship between illustrations, categories and themes.
3.0 Logging onto JBI TAP

Registration and access to JBI TAP is via JBI at LWW, which you can access at http://evidencebasedpracticenetwork.nursingcenter.com

Once registered, direct access to the online tool is available at: http://www jbiconnect.org/sumari/tap/index.cfm

Once registered, enter your username and password where prompted on the entry page.
4.0 Main Menu

The main menu bar (illustrated below) appears on the top of each page for ease of navigation. The main menu bar includes the following functions:

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| Projects | Cases | Categories | Analysis | Logout | About |
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- **<Projects>:** lists the titles of project work you have created in TAP.
- **<Cases>:** are individuals or units of interest to the project, and can only be viewed once a project has been selected by clicking its title.
- **<Categories>:** links to the function of analysis, and cannot be selected until a specific project has been selected by clicking its title.
- **<Analysis>:** is selected once all illustrations for each case have been entered, categories created, the illustrations allocated to categories, and themes created and linked to categories. Analysis displays the graphical result, or TAP chart, of the full analysis and is only accessible from within a project.
- **<Logout>:** Clicking on the <Logout> button will exit users from the program. After entering any new data, be sure the <Update> button has been clicked before logging out of a session.
- **<About>:** describes the conceptual approach and development of TAP.
5.0 Creating a Project

Projects are the titles of the work you have created in TAP.

The entry page lists the ‘Projects’ that have been created and saved in the system. As new projects are added to the system they will appear at the top of the project list. Up to 10 ‘Projects’ can be displayed per page.

To create a project, click on the <Add> button located at either the bottom or top of the project list. A new window opens in which you are able to enter the project name, a project description and year of commencement. Note that all fields must be completed, and then click <Update> to save the information entered.
5.1 Editing and Deleting a Project

To ‘edit’ an existing project, click on the blue, hyperlinked <Edit> in the ‘Edit’ column on the right side of your screen. The project name, description and/or year of commencement can then be edited. Click on <Update> to save changes.

Projects can also be deleted from this page by selecting the <Delete> button. Confirmation is required to delete a project. Selecting <OK> will delete the entire project from within TAP.
6.0 Creating Cases

Once a project has been created, ‘cases’ can be added to the project. Cases are individuals or units of interest to the project or question, and can only be viewed or modified once a project has been selected by clicking on its title.

Cases can be added by clicking the <Add> button located at either the bottom or top of the case list. The name of the ‘Project’ you are currently working on will appear immediately beneath the main menu bar. As new ‘cases’ are added to the system they will appear at the top of the ‘case’ list. Up to 10 ‘cases’ can be displayed per page.

When entering a new ‘Case’, the title or name of the case is entered, the type of data it represents is described (for example, face-to-face or telephone interview), and the date of data collection using dd/mm/yyyy format entered.

Click <Insert> to upload each new case. Clicking <Cancel> will return to the ‘Case’ list page without saving any case data.
On the ‘Cases’ page and subsequent pages within TAP a menu list will appear on the left of your screen with functions that include:

- <Select> will show a list of all ‘cases’ in the project you are currently viewing.
- <Detail> will ask you to select a case; once a case is selected, clicking <Detail> will enable the editing of the case title, type of data or date. Within a work session clicking <Detail> will return you to edit the details of the last ‘case’ viewed.
- <Illustrations> allows you to view the list of illustrations, or data entered, for the chosen ‘case’ (or case last viewed). From this screen new illustrations can also be added (See Section 7.0 below). Illustrations can only be added after first choosing a case.
6.1 Editing or Deleting Cases

‘Cases’ can only be edited or deleted when selected individually within a specific project.

To edit an existing case, click on the blue, hyperlinked <Edit> in the ‘Edit’ column on the right of the screen. The case name, type of data or date can then be edited. Click <Update> to save changes. Click <delete> to delete ‘cases’ from within a ‘project’. As with deleting a project (see Section 5.1 above), confirmation is required to delete a case.
7.0 Entering Illustrations

Illustrations are phrases or segments of text that represent the views of each individual case. ‘Illustrations’ should be extracted and entered verbatim for further thematic analysis. Such representative data extraction adds to the transparency and reproducibility of the thematic analysis process.

To enter an ‘illustration’, choose a ‘case’ by clicking the hyperlinked name of the case appearing in the ‘Case’ column. This will open the ‘illustrations’ display. The name of the ‘case’ (along with the type of data and date entered) you are currently entering illustrations for will appear immediately underneath the main menu bar. Up to 10 ‘illustrations’ can be displayed per page.

To add an illustration, click on the <Add> button located at either the bottom or top of the list of illustrations. A new window opens in which to enter the illustration text. Click <Update> to save the information entered.
Click the <Add > button on the 'Illustrations' screen to continue entering illustrations until you are satisfied that having revisited the data multiple times that all illustrations have been identified and entered.

Illustrations can be edited by clicking on their title in the list for a given case. To add illustrations to other cases, click <Cases> in the main menu in TAP, select the next case, and add illustrations as described above, repeating this process for each case.
8.0 Creating Categories

Categories can be viewed by clicking on <Categories> in the top menu on the TAP window in your web browser.

Clicking <Categories> brings up a list of all illustrations for all cases within a project, as illustrated below. The name of the ‘Project’ the categories you are viewing are a part of appears immediately beneath the main menu bar.

To create a ‘Category’ from this window you have two options:

1. You may click the hyperlinked name of the individual ‘illustrations’ to be prompted to enter a category name. You will see a hyperlink to <Add new category> beneath the ‘Illustration from Case’ text box.
2. Click the <Categories> link, which appears in the left side menu once <Categories> has been selected from the main menu. This will open up a page listing all of the ‘categories’ within the project. Up to 10 ‘categories’ can be displayed per page. Click the <add> button at either the top or bottom of the page to enter a new ‘category’. Categories and summaries that appear in this list can be edited at any time by selecting the hyperlinked name of the category.

Irrespective of whether you use option 1 or 2, you will see a new screen appear to ‘Add a new category’.

Once the category has been given a name and a description or summary, click the <Update> button. Both fields must be completed to save and progress. Click <Cancel> to return to the ‘Categories’ page.
9.0 Creating Themes

On the ‘Categories’ page, an option is available for the management of ‘themes’ in the left side menu under ‘Illustrations’ and ‘Categories’. Clicking <Themes> will allow any ‘themes’ that are entered within a project to be viewed with their descriptive summary alongside.

To ‘add’ a new ‘Theme”, click on the <Add> button located either above or below the displayed list of themes. A new window will open in which you can enter the relevant details for the ‘theme’. Once the theme name or title, and a summary descriptive statement have been entered, click <Update> to save the information. Select <Cancel> to return to the themes page without saving any of the text entered.
9.1 Editing or Deleting Themes

Themes can be edited at any time by clicking on the hyperlinked name of the ‘theme’. Clicking <Update> will save any changes made. Click <delete> to delete the theme currently being viewed. You will be prompted for confirmation to delete a ‘theme’. Please note, the ‘Analysis’ function in the main header of TAP cannot be used until the illustrations have been linked to categories, and the categories to the themes – completing the thematic analysis process is detailed in Section 10.0.

10.0 The Thematic Analysis Process

As explained in Section 2.1 above, TAP lets users create a visual interpretation of the thematic analysis, or TAP chart, with ‘illustrations’ linked to specific ‘categories’, which then form one or more ‘themes’.

10.1 Linking Illustrations to Categories

Click on <Categories> in the main menu at the top of the TAP program page, this will produce a list of illustrations for the project, which will also have a column for categories – each illustration that has not been allocated to a category will be described as “undefined” in this column as illustrated below.
To link ‘Illustrations’ to a ‘Category’, click on the hyperlinked illustration text. This will open a new window allowing you to either edit the ‘Illustration’ (see Section 7.0 above) or assign the ‘Illustration’ to a ‘Category’.

Refer to Section 8.0 above for instructions on how to add a new category.

For the selected ‘illustration’, click to open the dropdown menu alongside “Category”. You will see a list of all of the categories you have entered. Select the category that you wish to assign the illustration to and then click <Update> to create and save the link between illustration and category.
The process can be repeated with all of the ‘illustrations’ that need assigning to ‘categories’. Once complete, all illustrations should have a category listed next to them. Multiple ‘illustrations’ can be assigned to each ‘category’.

At any time, you can select any ‘illustration’ and choose a different ‘category’, or create a new category and assign the illustration to it, allowing you to modify or alter existing allocation of illustrations to categories.

To aid with navigation, on the “Categories” screen above the table listing the illustrations and categories you will see a dropdown field labeled “Filter”. From this dropdown list, select the category you wish to ‘filter’ the illustration data by and then click the <Filter> button. Only those illustrations assigned to the category title selected will appear on the screen.

To return to the full list, select <All> and then click the <Filter> button. To rapidly identify those illustrations still waiting to be assigned to a category, select <Undefined> and then click the <Filter> button.
10.2 Linking Categories to Themes

With ‘illustrations’ linked to ‘categories’, the next step is to link ‘categories’ to ‘themes’.

First, click on the <Categories> menu tab at the left side of the screen. A list of all the ‘categories’ for the project will be displayed.

To link ‘Categories’ to ‘Themes’, click on the hyperlinked ‘category’ name or title. This will open a new window allowing you to either edit the ‘category’ (see Section 8.0 above) or assign the ‘Category’ to a ‘Theme’.

Refer to Section 9.0 above to see how to add a new theme.
For the ‘Category’ you have selected, click to open the dropdown menu alongside “Themes” towards the bottom of the screen. You will see a list of all of the ‘themes’ you have entered to date. Select the ‘theme’ that you wish to assign the category to, and then click <Update> to create and save the link between ‘category’ and ‘theme’.

The process can be repeated with all of the ‘categories’ that need assigning to ‘themes’. Multiple categories can be assigned to each ‘theme’.

10.3 Viewing the Thematic Analysis

As you link each ‘category’ to a ‘theme’, your visual representation of your thematic analysis, or TAP chart, will begin to build immediately. You can view it at any time by clicking on <Analysis> on the main menu bar. Please note however, no image will appear until the first ‘theme’ is linked!

To view either the partial or completed analyses displayed as a TAP chart, click the <Analysis> link in the main menu at the top of the screen. This loads a new view that includes the case ‘illustrations’, the ‘categories’ they have been linked to, and clearly illustrates the links to the ‘themes’ that have been created.

Clicking on the <Add Theme> button will allow you to add extra themes directly from this page (see Section 9.0), which can then be linked to any unassigned categories if appropriate (See Section 10.2).

Clicking on the <Print> button at the bottom of the page will print the current screen view.
Each blue line in the TAP chart is a hyperlink that can be selected. Selecting one of the hyperlinked titles in the chart opens a new screen allowing the specific illustration, category or theme to be edited.

To ‘export’ the TAP chart to other documents or software, click the “Export TAP Chart” button at the bottom left of the screen and follow the instructions for copying and pasting.

Alternatively, use the <Save As> option from within your web browser to save the TAP page as a ‘Webpage, complete’ document type. Once saved, it can be opened as a web page directly from your computer, or inserted in to a MS Word document or similar file.