

## Dovetail Course Syllabus

### Dovetail for UX Research

In this Dovetail course from American Graphics Institute, learn to effectively use Dovetail to organize, analyze, and share UX research findings. Whether you're a beginner looking to get started or an experienced researcher who lacks formal training, this course provides a comprehensive, hands-on approach to mastering Dovetail's features and optimizing research and reporting.

**Dovetail course instructor:** This course is led by a practicing UX researcher from American Graphics Institute that has managed many UX research projects in a UX research lab. The instructor holds a Masters of Science degree in Human Factors Information Design.

By the end of this course, you will be able to:

- Confidently navigate Dovetail's interface and workspace
- Organize and tag qualitative research data for deeper insights
- Use Dovetail to analyze interview transcripts, usability tests, and survey responses
- Synthesize findings into structured reports with evidence-backed insights
- Collaborate with teams and streamline research workflows
- Manage and secure an insights hub for long-term research accessibility

### Course Outline

#### Getting Started with Dovetail

Familiarize with Dovetail's interface and foundational features for UX research.

- **Introduction to Dovetail**
  - Overview of Dovetail as a UX research platform.
  - Key benefits for researchers and teams.
- **Navigating the Dovetail Interface**
  - Understanding the workspace: projects, notes, tags, and insights.

- Customization options to tailor the workspace to your needs.

- **Creating and Managing Dovetail Projects**

- Setting up new projects with appropriate structures.
- Importing and organizing various data types: notes, audio, video, and transcripts.
- Utilizing templates to standardize research processes

#### Advancing Your Analysis using Dovetail

Develop advanced analytical skills to extract meaningful insights from research data gathered using Dovetail.

- **Tagging and Theming**
  - Creating and managing a hierarchical tagging system.
  - Applying tags to identify patterns and themes across datasets.
- **Utilizing Fields for In-Depth Analysis**
  - Setting up custom fields to capture specific data attributes.
  - Filtering and sorting data using fields to uncover trends.
- **Analyzing Diverse Data Sources**
  - Approaches for handling different data types: text, audio, video, and survey responses.
  - Leveraging Dovetail's tools for comprehensive analysis.

### **Crafting Shareable Findings with Dovetail**

Learn to create compelling and actionable insights using Dovetail that effectively communicate research outcomes.

- **Summarizing Findings**
  - Writing clear and concise insights.
  - Linking evidence such as quotes and media to support insights.

- **Creating Visual Reports**
  - Designing dashboards and visualizations to represent data effectively.
  - Utilizing storytelling techniques to engage stakeholders.
- **Sharing and Exporting Insights**
  - Collaborating within Dovetail by sharing projects and reports.
  - Exporting findings to various formats (PDF, CSV, slides) for broader dissemination.

### **Answering Questions with Dovetail**

Utilize Dovetail's features to address specific research queries and inform decision-making.

- **Navigating the Insights Hub**
  - Exploring and searching within the insights repository.
  - Utilizing filters and search functions to find relevant data.
- **Synthesizing Information**
  - Combining insights from multiple projects to answer complex questions.
  - Identifying trends and patterns across datasets.
- **Making Data-Driven Decisions**
  - Translating insights into actionable recommendations.
  - Presenting findings to inform product and design strategies.

## Enabling Your Research Team

Set up Dovetail to enhance team collaboration and standardize research practices.

- **Onboarding Team Members using Dovetail**
  - Inviting users and assigning roles within the workspace.
  - Providing resources and support for users.
- **Standardizing Research Processes**
  - Creating and utilizing project templates for consistency.
  - Establishing tagging conventions and analysis frameworks.
- **Managing User Permissions**
  - Setting access levels to protect sensitive information.
  - Monitoring activity to ensure data integrity.

## Managing Your Dovetail Insights Hub

Maintain a secure, organized, and efficient insights repository within Dovetail.

- **Structuring the Insights Hub**
  - Organizing insights for easy navigation and retrieval.
  - Implementing naming conventions and metadata tagging.
- **Ensuring Security and Compliance**
  - Managing Personally Identifiable Information (PII) within projects.
  - Implementing data retention policies and compliance measures.
- **Authentication**
  - Setting authentication methods.
  - Reviewing user access and permissions.
  - Timelines

[\*Find dates and register for this Dovetail course online.\*](#)

In this course you start by learning how to set up and manage research projects using Dovetail, import and tag data, and analyze qualitative insights. Then, you'll dive deeper into advanced tagging strategies, synthesis techniques, and collaboration tools to enhance team efficiency. The course also covers creating shareable findings, answering key research questions, and structuring an insights repository for long-term usability. This course includes hands-on exercises and projects, equipping you with the skills needed to transform raw research data into actionable insights, empowering your team to make user-centered design decisions with confidence.

## Custom and private Dovetail courses

This Dovetail course is available as a private class. Curriculum can be customized for your specific needs. Dovetail classes can be delivered at your location, online, or in our classrooms. For more information, call 781-376-6044 to speak with an American Graphics Institute training consultant or [contact us](#).