NVIVO

# NVIVO 9

## GETTING STARTED

This guide will get you up and running with NVivo.
It provides steps for installing the software and
starting a new project, and gives an introduction to
the NVivo workspace and features.

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# Contents

# Introducing NVivo

Welcome to NVivo. This guide will get you up and running with an NVivo project. It explains how to install the product and introduces the features you can use to organize, analyze and get the most out of your materials or sources.

## Access NVivo Help and other resources

The NVivo Help provides comprehensive instructions for using NVivo, and the Help welcome page contains links to other useful resources, including:

• NVivo tutorials—see the software in action

• The QSR Forum—ask questions and share your experiences

• FAQs—find answers to common questions

• Training—find out about online and face-to-face training workshops

• Support—get help from our expert support team

To access the NVivo Help, you can:

• Click the help icon  in the upper right of the NVivo ribbon or in any dialog box.

• Click the **File** tab, then click **Help**, and then click **NVivo Help**:
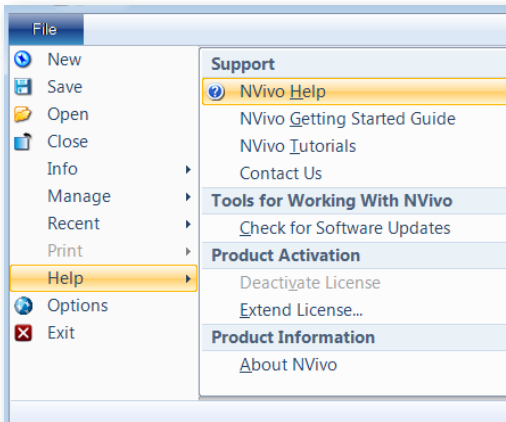


You can get the most up-to-date help via the web or you can choose to access 'offline' help that is installed with NVivo. If you are connected to the Internet, web help will automatically be displayed—if you prefer to work with 'offline' help, change the setting in NVivo's application options.

## Use the sample project

If you prefer 'hands on' learning, feel free to explore and work with the NVivo sample project—Environmental Change Down East. This is a 'real-world' project that illustrates the main features of the product. Looking at how the sample project is organized may give you ideas about approaching your own project. You can also use the sample data to explore queries, visualizations and other analysis tools—you don't have to wait until you have imported your own data.

You can access the sample project from the **My Recent Projects** list on the NVivo Welcome screen—this screen is displayed when you launch NVivo.

## What can I do with NVivo?

Using NVivo you can:

- **Manage everything** in one place—gather your source materials and record your analytical thoughts in one secure project file.
- **Share projects** on NVivo Server—you can combine NVivo with NVivo Server so that you and your colleagues can work on the same project at the same time.
- **Import and analyze** any combination of documents, PDFs, spreadsheets, databases, audio, video or pictures.
- **Manage your bibliographical data** by importing data from applications like EndNote, Zotero or RefWorks. You can also build a bibliography in NVivo and export it to a reference management tool when you are ready to write up your findings.
- **Code your sources** to gather material into themes or nodes—drag and drop, use the Quick Coding bar or take advantage of auto coding—NVivo provides practical tools to make coding quick and easy.
- **Organize your nodes** in folders and build node hierarchies to suit your project.
- **Make and classify 'case' nodes** to gather descriptive information about people, places or organizations.
- **Use sophisticated text analysis tools** to help you find meaning in unstructured data— look for specific words or words with similar meanings—search for *tourist* and also find *traveler, holidaymaker*, and *sightseer.* Automatically code what you find.
- **Run queries** to uncover trends or see how ideas are related. Visualize the results with a single click.
- **Use visualizations to gain new perspectives** on your material. From word trees and tag clouds to tree maps and cluster analysis, NVivo 9's new visualization techniques help you to see the patterns and connections in your data.
- **Export your data** and use it in other applications like Word, Excel, IBM SPSS Statistics and EndNote.
- **Share your findings** by running customized reports or by saving your nodes and sources as HTML pages.

# Install and activate NVivo

This section describes the requirements for installing NVivo and provides the steps for installation and activation.

## Minimum requirements

NVivo supports the following minimum requirements:

- 1.2 GHz Pentium III-compatible processor (32-bit) or 1.4 GHz Pentium 4-compatible processor (64-bit)
- 1 GB RAM or more
- 1024 x 768 screen resolution
- Microsoft Windows XP SP2
- Approximately 1 GB of available hard-disk space (or more depending on data storage needs)

## Recommended requirements

The following system requirements are recommended for optimum performance:

- 2.0 GHz Pentium 4-compatible processor or faster
- 2 GB RAM or more
- 1280 x 1024 screen resolution or higher*
- Microsoft Windows XP SP2 or later, or Microsoft Windows Vista SP1 or later, or Microsoft Windows 7
- Approximately 2 GB of available hard-disk space (or more depending on data storage needs)
- Internet connection

* For non-English NVivo user interfaces, 1440 x 900 screen resolution or higher is recommended

## Install NVivo

Installing NVivo is a simple process that involves moving through a series of screens. Before installing, make sure that your computer meets the hardware and software requirements described above.

You must have administrator permissions for the computer on which you are installing the software.

1   Insert the NVivo 9 DVD into the DVD drive. If the DVD menu does not automatically display, locate and double-click the file NV9Menu.exe on the DVD.

    **Note:** If you downloaded NVivo electronically, locate and double-click the downloaded file. The installation process starts automatically.

2   Click the install button and follow the prompts to:

    •   Install any prerequisite components. You may be asked to restart your machine—on restart the installation will continue automatically.

    •   Accept the license agreement and enter your license key. You can find the license key on your NVivo DVD case or—if you downloaded the product—in the email communication from QSR.

    •   Choose the **Complete** set up option (recommended for most users) and, if required, change the default location of NVivo program files.

    •   Confirm the location of program icons and select which icons you want to include on your desktop.

    •   Select the default user interface language you want to use—this language will be used for all ribbon commands and dialog boxes in NVivo.

3   Click **Install** and the installation confirmation is displayed.

4   Click **Finish**.  To start NVivo, double-click the QSR NVivo 9 icon on your desktop.

**Note:**

•   If you are running a 64-bit version of Windows 7, you will have the option of installing a 32-bit or 64-bit version of NVivo 9.  There are some known limitations (playing .mov and .qt video files and using model layouts) with the 64-bit version—for more information, refer to the FAQs area of the QSR website (www.qsrinternational.com).

•   If you are a system administrator installing and activating NVivo on multiple computers, you can perform a 'silent install' using MSI command line techniques. Refer to the 'NVivo 9 Network Administrator's Guide' for more information. You can download this guide from the QSR website (www.qsrinternational.com).

## Activate NVivo

After installing NVivo, you have a limited amount of time before you are required to 'activate' the product. Product activation is a simple and secure process that ensures valid licenses are used to operate the software. You can activate your license via the Internet or by contacting QSR.

### Activate via the Internet

If you are connected to the Internet, you can activate your license online:

1    Ensure that you are connected to the Internet.

2    Click the **File** tab, point to **Help**, and then click **Activate license**.

3    In the **Activate** dialog box, click the **Activate via Internet** option.

4    Enter your details. Those marked with an asterisk (*) must be provided.

5    Click **Activate** (to complete your product activation).

### Contact QSR to activate

If you do not have an Internet connection, you can provide an activation request to QSR by email, mail, fax or phone. Then, enter the activation key provided by QSR to activate your license.

To send an activation request by email, mail, fax or phone:

1    Click the **File** tab, point to **Help**,  and then click **Activate license**. The **Activate** dialog box opens.

2    Click **Activate via Email**, **Mail/Fax** or **Phone**. You cannot activate by email if you use an Internet browser to access email (webmail).

3    Enter your details. Those marked with an asterisk (*) must be provided.

4    Click the **Generate** button to obtain an **Installation Key**.  (This must be provided to QSR along with your details).

5    If you are activating by email, click the **Send** button. **NVivo** will generate an activation request email using your default mail client. Send this email to QSR.
     OR
     If you are activating by mail, fax or phone, click the **Print** button to print the **NVivo Activation Request** form. Contact QSR using the details provided on the form.

To enter the activation key provided by QSR:

1    Click the **File** tab, point to **Help**, and then click **Activate license**. The **Activate** dialog box opens.

2    Click the **Activate via Email**, **Mail/Fax**, or **Phone**.

3    In the **Activation Key** field, enter the **Activation Key** provided by QSR.

4    Click the **Activate** button.
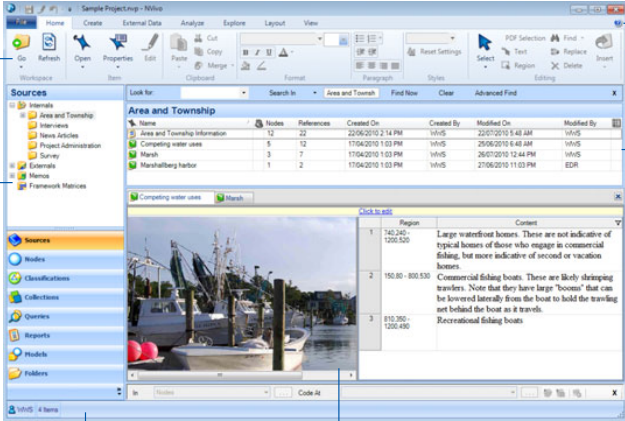
## Deactivate NVivo

You may want to deactivate the NVivo license on a particular computer. For example, if you get a new computer, you should deactivate the NVivo license on your old computer, before installing and activating NVivo on your new computer. Refer to the NVivo Help for instructions on how to deactivate NVivo.

# The NVivo workspace

The NVivo workspace is designed to provide easy access to all your project material:

The ribbon helps you to locate all NVivo commands

Access Help

See the contents of a folder in List View

Navigation View lets you organize your material into folders



Check the status bar to see what is happening in your project

Work with your sources, nodes or other project items in Detail View. Undock Detail View to work in a separate window

## Working with the ribbon

The ribbon is designed to help you locate commands. Commands are organized into logical groups, collected together under tabs. Each tab relates to a type of activity, such as creating new project items or analyzing your source materials.

Quick Access toolbar for save, edit and undo.

Tabs for accessing commands related to an activity

Hover over a command to see a description

The File tab for managing projects, printing, and setting application options
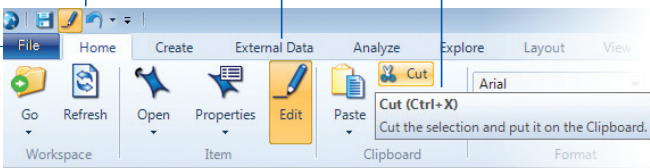
Commands are organized in groups

You can also use the keyboard to access the ribbon—this ensures that commands are accessible to a wide range of users, including those who have limited dexterity or other disabilities. Refer to NVivo Help for more information about accessibility features.

# Navigation View

Navigation View helps you to organize and easily access all of the items in NVivo:

**Sources**
- Internals
- Externals
- Memos
- Framework Matrices

NVivo provides folders for your research materials. You can add folders under them to organize project items

Drag the handle down to make more room

- Sources
- Nodes
- Classifications
- Collections
- Queries
- Reports
- Models
- Folders

Click a button to see all the folders in the group

Click to see folders for all project items

Click to customize Navigation View

The items available in Navigation View include:

- **Sources**—the collective term for your research materials including documents, PDFs, datasets (for example, spreadsheets), audio, video and pictures.

- **Nodes**—containers that let you gather related material in one place so that you can look for emerging patterns and ideas. You can create and organize nodes for themes, people, organizations or other cases. You can also create nodes to gather evidence about the relationships between items in your project.

- **Classifications**—descriptive information about your sources, nodes and relationships.

- **Collections**—views (or groupings) of project items that are stored elsewhere in your project—for example a set made up of sources you need to review or Search Folders for frequently used searches.

- **Queries**—search criteria that can help you to find and explore patterns in source text or coding. You can save queries and rerun them as your project progresses.

- **Reports**—reports and extracts that you can use to track your progress or make your data available for use in other applications.

- **Models**—shapes and connectors that provide a way of visually exploring or presenting the data in your project.

## List View

When you select a folder in Navigation View, its contents are displayed in List View. In this view, you can add new items, open existing items and edit item properties.

This List View displays the contents of a folder:

Double-click an item to open it

Drag boundary to resize columns

Sort the list by clicking on column headings

For sources or nodes, see the assigned color

| Interviews | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Name | | Nodes | References | Created On | Created By | Modified On | Modified By | Classification |
| Barbara | | 43 | 208 | 27/05/2010 9:03 | WwS | 22/07/2010 6:3 | WwS | Interviews |
| Betty and Paul | | 16 | 51 | 27/05/2010 1:49 | WwS | 26/07/2010 2:2 | WwS | Interviews |
| Charles | | 33 | 153 | 27/05/2010 9:03 | WwS | 22/07/2010 6:3 | WwS | Interviews |
| Dorothy | | 35 | 145 | 27/05/2010 9:03 | WwS | 22/07/2010 6:3 | WwS | Interviews |
| Helen | | 17 | 66 | 17/04/2010 12:5 | WwS | 22/07/2010 11: | WwS | Interviews |
| Ken | | 20 | 63 | 27/05/2010 1:36 | WwS | 22/07/2010 11: | WwS | Interviews |
| Margaret | | 30 | 89 | 27/05/2010 9:03 | WwS | 22/07/2010 6:3 | WwS | Interviews |

Right-click on items to access a context menu

Display an optional column for classification

## Detail View

When you open an item from List View it is displayed in Detail View. This is an example of survey responses opened in Detail View:

Open multiple items and move through them using the tabs

You can also undock Detail View to work in a separate window

| ID | Respondent | Community | The water quality Down East is | The natural environment Down East is |
|---|---|---|---|---|
| 6 | DE016 | Sea Level | a great reason resource which is being squandered by pollution | splendid. |
| 7 | DE017 | Cedar Island | getting worse | beautiful |
| 8 | DE018 | Gloucester | sufficient to support our people if the Feds would let us | not like it used to be without the support of local people in respect to fishing and supporting waterfowl |
| 9 | DE019 | Sea Level | very important | going to be destroyed if something is not done |

Survey Responses | Marsh | Barbara

16 of 104

Annotations

| Item | Content |
|---|---|
| 2 | Not sure what the respondent meant by a 'reason resource'? |

In Nodes | ... | Code At Environmental impacts (Nodes\\Natural environment) | ... |

# Start NVivo and create a new project

You can create a new standalone project (saved as a .nvp file) on your computer or a network drive. If your organization has purchased NVivo Server, and you have appropriate server user permissions, you can create a new server project—refer to the NVivo Help for more information.

## Start NVivo

1   Double-click the NVivo 9 icon on your desktop.

The NVivo Welcome screen is displayed and the **Welcome to NVivo** dialog box opens:
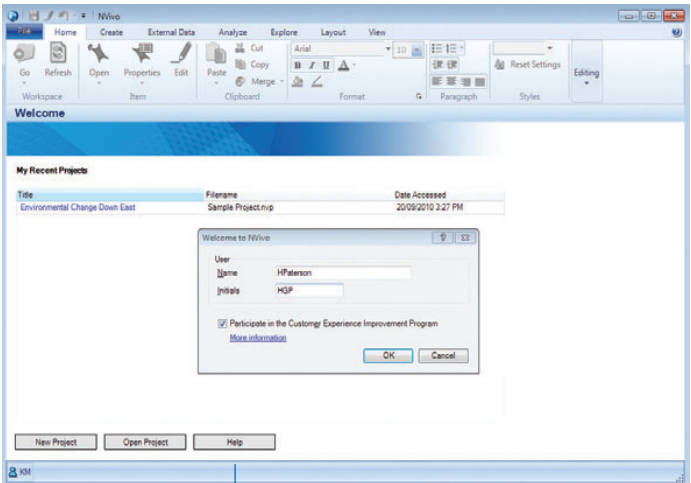


You can open the sample project to see a real project in action

Create a new project or open an existing one

Access comprehensive online help and link to other resources

2   By default, your Windows user name is displayed in the **Name** box.

3   In the **Initials** box, enter the initials you want to use to identify your work in NVivo projects. This is especially useful if you are working with other team members on standalone projects—refer to the NVivo Help for more information about team work in standalone projects.

4   (Optional) Clear the check box if you do not want to participate in the Customer Experience Improvement program—click the link to find out more about the program.

5   Click **OK**.

## Create a new standalone project

To create a new standalone project:

1  Click the **File** tab, and then click **New**.

   The **New Project** dialog box opens.

2  Enter a name for this project in the **Title** box.

3  (Optional) Enter a description for this project in the **Description** box.

4  Click the **Browse** button on the **File name** box.

5  In the **Save as type** list, make sure NVivo Projects (*.nvp) is selected.

6  (Optional) Change the default file name and location.

7  Click **Save**, and then click **OK**.

## Create a new server project

If your organization combines NVivo with NVivo Server, you can store your projects on a secure server—this allows team members to work in the same project at the same time. If you want to create a new server project, you need access to NVivo Server and appropriate server user permissions—contact the server administrator if you need assistance.

You work with your source materials in exactly the same way in standalone and server projects—the main differences between server and standalone projects are: the location of your project, how your project is saved, and user access controls. Refer to the NVivo Help for more information about working with NVivo server projects.

### Set up a server connection

To create and save NVivo Server projects, you need a server connection. Your server administrator may have already set this up for you. To create a server connection:

1  Click the **File** tab, and then click **Options**.

   The **Application Options** dialog box opens.

2  Click the **Connections** tab.

Give the connection a name and specify the host server name or address. Contact your server administrator if you need assistance
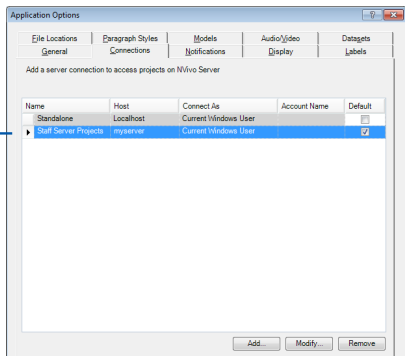


3    Click the **Add** button.

     The **Connection Properties** dialog box opens.

4    Name the connection—choose a name that will be meaningful to you. For example, *Staff Projects Server*.

5    Specify the host server name or address—you can enter:

-    A server name, for example 'myserver'
-    A fully qualified domain name, for example 'myserver.abccompany.com'
-    An IP address

     You may need to ask your server administrator for assistance.

6    Specify whether you want to connect using your current Windows login or whether you want to connect with a different Windows user account.

7    Click **OK**.

8    (Optional) On the **Connections** tab, select the **Default** check box to make this your default connection.

9    Click **OK**.

### Create the server project

1    Click the **File** tab, and then click **New**.

     The **New Project** dialog box opens.

2    Enter a name for this project in the **Title** box.

3    (Optional) Enter a description for this project in the **Description** box.

4    Click the **Browse** button on the **File name** box.

5    In the **Save as type** list, make sure **NVivo Server Projects** is selected.

6   From the **Connection name** box, select the server where you want to create your new project.

7   (Optional) Change the project name—by default, the project name is the same as the project title.

8   Click **Save**, and then click **OK**.

**Note:**

•   The **Connection name** box is empty if you have not set up any server connections—click the **Add** button to create a new server connection using the **Connection Properties** dialog box.

•   If you are having trouble creating server projects, contact your server administrator.

# Open a project in NVivo

You can open a standalone project saved on your computer or a network drive, or (if you have access to an NVivo Server) you can open a server project.

## Open a standalone project

1   Click the **File** tab, and then click **Open**.

The **Open Project** dialog box opens.

2   Select **NVivo Projects (\*.nvp)** from the **File** or **Project type** list.

3   Locate and select the project you want to open.

4   Click **Open**.

## Open a server project

1   Click the **File** tab, and then click **Open**.

The **Open Project** dialog box opens.

2   Select **NVivo Server Projects** from the **File** or **Project type** list.

3   In the **Connection name** box, select the server hosting the project.

4   In the **Project files** box, select the project that you want to open.

5   Click **Open**.

**Note:**

•   The **Connection name** box is empty if you have not set up any server connections—click the **Add** button to create a new server connection using the **Connection Properties** dialog box.

•   The **Project files** list only shows server projects you are permitted to access. If you cannot locate a project, verify with the Project Owner that you are permitted to access the project.

# Bring your sources into NVivo

Sources are the materials that you want to analyze in NVivo—they can include documents, PDFs, pictures, audio, video, spreadsheets or databases.

When you create a project you will see ready-made folders for your sources:

The Internals folder is for the 'primary' materials that you import or create including any combination of documents, PDFs, datasets, audio, video or pictures

**Sources**
- Internals
- Externals
- Memos
- Framework Matrices
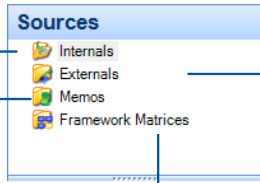
The Externals folder is for the 'proxies' that represent materials that you cannot import such as books

The Memos folder is for memos that record your analytical observations and insights

This folder is for framework matrices which provide a way to summarize your source materials. Refer to NVivo Help for more information

You cannot add or delete folders at this top level, but you can create sub folders to organize your internals, externals, memos or framework matrices—you can do this at any time. To create a new folder using the ribbon—on the **Create** tab, in the **Collections** group, click **Folder**.

This section explains how to import a single source of each type. You can choose to import multiple sources at the same time (except for datasets) but the options you get are slightly different—refer to the NVivo Help for more information.

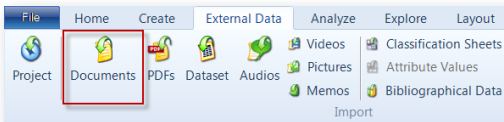## Import documents and PDFs

You can import Word documents, PDF files, rich text files, and text files into NVivo.

Word documents, rich text files and text files are imported as document sources. You can also create document sources directly in NVivo—refer to the NVivo Help for instructions.

PDF files are imported as PDF sources. You might also have PowerPoint presentations, web pages or other digital content that cannot be directly imported into NVivo—if you save or export this content to a PDF file, then you can import it into NVivo as a PDF source.

To import documents and PDFs:

1   In Navigation View, click the **Internals** folder (or a subfolder under it).

2   On the **External Data** tab, in the **Import** group, click **Documents** or **PDFs**

| File | Home | Create | External Data | Analyze | Explore | Layout |

Project | Documents | PDFs | Dataset | Audios | Videos | Pictures | Memos | Classification Sheets | Attribute Values | Bibliographical Data

Import

The **Import Internals** dialog box opens.

3   In the **Import from** box, click the **Browse** button, select the file you want to import and click **Open**.

4   Click **OK** to display the **Document** or **PDF Properties** dialog box.

5   Make any changes to the name or description and click **OK**.

The imported document or PDF is displayed in List View and you can double-click to open it:



Select text, such as this paragraph, and code the text at a node

In PDFs you can also select regions of the page, such as this image, and code the region at a node
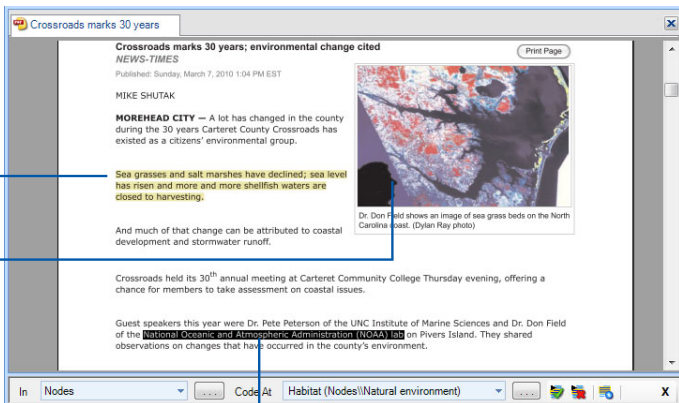
Add annotations or 'see also' links to selected text (or to selected regions of the page)

**Note:**

- In PDF sources, you can switch between text and region selection—on the **Home** tab, in the **Editing** group, under **PDF Selection**, click **Text** or **Region**.

- If you want to edit the content of a document source, you must switch to edit mode—click the yellow information bar displayed at the top of Detail View. You cannot edit PDFs.

- Some elements of Word documents are not imported—for example, headers and footers.

- If you are using NVivo 9.0, PDF files are imported as document sources. To work with PDFs in the way we describe here, you need to be using NVivo 9.1 or later. To update your software, click the **File** tab, point to **Help**, and then click **Check for Software Updates**. Refer to the NVivo Help for more information.

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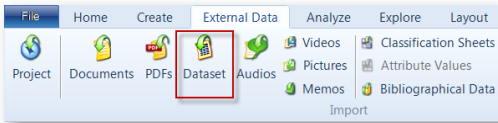## Use the Import Dataset Wizard to import spreadsheets and databases

A dataset contains structured data arranged in records (rows) and fields (columns)—for example, a dataset could contain the responses to a survey. You can create a new dataset source in NVivo, by importing data from:

- An Excel spreadsheet (.xls or .xlsx)
- A text file containing comma or tab-separated values (.txt)
- A database—for example, a Microsoft Access, SQL Server or ODBC-compliant database

You cannot edit the contents of a dataset once it is imported. Before import, you should prepare your data and consider how you want to use it in NVivo—refer to the NVivo Help for detailed instructions.

To import datasets, you use the Import Dataset Wizard. To launch the wizard:

1 In Navigation View, click the **Internals** folder (or a subfolder under it).

2 On the **External Data** tab, in the **Import** group, click **Dataset**.



The **Import Dataset Wizard** opens.

3 Click the **Browse** button and select a worksheet or text file—if you want to import a database, you will need to establish a connection.

4 Follow the instructions in the **Import Dataset Wizard**—refer to the NVivo Help. The dataset is opened in Detail View:



Apply filters to see a subset of the data

Select a 'codable' column and gather the contents in a node

View the dataset as a table or see each record in a form

Select content and code it at a node

Add annotations or 'see also' links

Navigate through the records

Refer to the NVivo Help for comprehensive information about working with and analyzing datasets—including methods for auto coding based on column names and row values.

## Import audio and video

You can import audio or video in any of the following formats:

- MPEG-1 Audio Layer 3 (.mp3)
- Microsoft Windows Media (.wma, .wav)
- MPEG file formats (.mpg, .mpeg, .mpe, .mp4)
- Windows Media (.avi, .wmv)
- QuickTime (.mov, .qt)

Before you import audio or video material:

- Consider any editing requirements. For example, if you have hours of video footage, you may want to edit it down to a manageable size—you cannot do this editing in NVivo.  If you have many large videos, you can choose to store them outside the project so that software performance is not compromised.

- Think about whether you will require transcripts for your audio and video sources. They can be imported from Microsoft Word or you can transcribe the media directly in NVivo. When it's time to code your information, you can code directly in an audio or video, or you can code the transcript.

To import audio or video:

1   In Navigation View, click the **Internals** folder (or any sub folder under it)

2   On the **External Data** tab, in the **Import** group, click **Audios** or **Videos**.
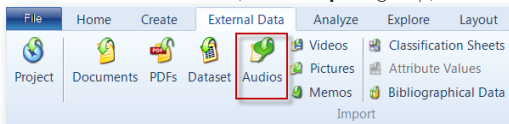


The **Import Internals** dialog box opens.

3   In the **Import from** box, click the **Browse** button, select the file you want to import and click **Open**.

4   Click **OK**.

The **Audio** or **Video Properties** dialog box opens.

5   (Optional) Make any changes to the name or description.

6   (Optional) Click the **Audio** or **Video** tab to set options for embedding the file or storing it in another location. Refer to the NVivo Help for more information about storing audio and video files.

7   Click **OK**.

The imported audio or video is displayed in List View and you can double-click to open it:

Code directly on
the timeline

Add 'see also' links and annotations
to the timeline or to the transcript

A transcript is
optional—you
can import one
or transcribe in
NVivo

Select content and code it at a node

You can play an audio or video file using the playback controls in the ribbon:

## Import pictures

You can import pictures in any of the following formats:

- Windows bitmap (.bmp)
- Graphic Interchange Format (.gif)
- Joint Photographics Expert Group (.jpg, .jpeg)
- Tagged Image File Format (.tif, .tiff)

To import a picture:

1    In Navigation View, click the **Internals** folder (or any sub folder under it).

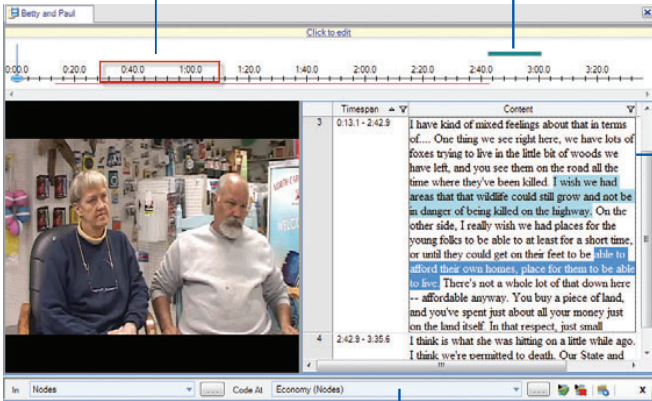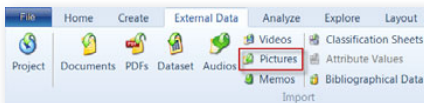2    On the **External Data** tab, in the **Import** group, click **Pictures**.

The **Import Internals** dialog box opens.

3   In the **Import from** box, click the **Browse** button, select the file you want to import and click **Open**.

4   Click **OK** and the **Picture Properties** dialog box opens.

5   (Optional) Make any changes to the name or description and click **OK**.

The imported picture is displayed in List View and you can double-click to open it:

Code directly on the picture

Create a log to describe the picture (or just selected regions)



Code content in the log

## Create externals for the sources you cannot import

Externals are 'proxies' for the material you cannot import into NVivo such as books, or newspaper articles. You can create an external source (that looks like a document) and summarize the content of the item—for example, you might enter interesting quotes from an article or summarize the chapters in a book. You can then code or annotate this content.

If the external represents a web page or a file on your computer, you can create a link to the web page or file and easily open it from within NVivo.

1   In Navigation View, under **Sources**, click the **Externals** folder.

2   On the **Create** tab, in the **Sources** group, click **External**.

The **New External** dialog box opens.

3   Set the options—refer to the NVivo Help for detailed information.

4   Click **OK**.

**Note:** If you have digital content that you cannot directly import into NVivo (for example , a PowerPoint presentation), you may be able to save or export the content to a PDF file, which you can import into NVivo as a PDF source.

## Edit the content of sources

When you open a source, it is opened in 'read only' mode—this protects the integrity of your source material as you code and analyze the content. If you want to edit or format the text content in a source, you can switch to edit mode—click the yellow information bar at the top of Detail View:
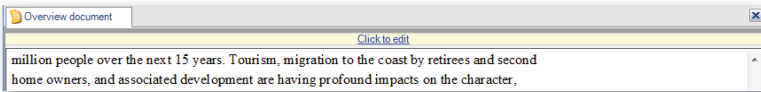


**Note:** You cannot switch to edit mode when working with PDFs or datasets—they cannot be edited in NVivo.

## Import bibliographical data

If you have conducted a literature review using a bibliographical application like EndNote, Zotero or RefWorks—you can export the data from the application as an EndNote XML file or RIS file and import it into NVivo. The records are added as sources in your project and the bibliographical details are stored as 'source classifications' and attribute values.

To import the file:

1  On the **External Data** tab, in the **Import** group, click **Bibliographical Data**.

2  Locate and select the EndNote XML or RIS file you want to import, and then click **Open**.

   The **Import Bibliographical Data** dialog box opens.

3  Review the default import options and make any required changes.

4  (Optional) Click **Advanced**, to modify your import options for specific references.

5  Click **Import**.

You can also add bibliographical details by 'classifying' your sources in NVivo—when you are ready to write up your findings, you can export this data to your reference management tool and use its features to insert citations and format the references.

Refer to the NVivo Help for more information about classifying your sources and working with bibliographical data.

# Code to gather material at a node

You can 'code' your sources to gather material based on themes and topics or on 'cases' such as people or organizations. For example you could create the node *water quality* and as you explore your sources (documents, PDFs, datasets, audio, video or pictures) you could code all references to *water quality* at the node. You can create nodes before you start coding or on-the-fly as you code.

## Build a node structure in List View

If you already know what themes or cases you are looking for, you can create and organize the nodes before you start coding:
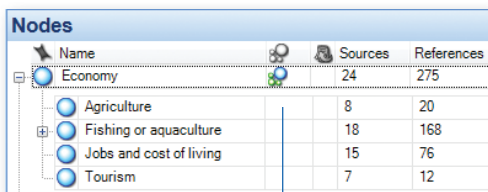
1   In the Navigation View, click **Nodes**.

2   On the **Create** tab, in the **Nodes** group, click **Node**.
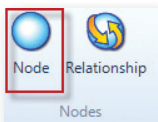


The **New Node** dialog box opens.

3   Enter a name and description.

4   Click **OK** and the new node is added to List View.

You can add 'child' nodes (sub-nodes) under the new node and create a node hierarchy:



As you code at the node you can see the number of sources and references increase

This parent node has 'aggregation' turned on. Any content coded at the child nodes is rolled-up into the parent node—you can display a column to see this

## Organize nodes in folders

Under the **Nodes** folder, you can add your own folders to organize nodes:

For example, you could have a folder for your theme nodes and a folder for people, organizations or other 'cases'

**Nodes**
- Nodes
  - Autocoded Responses
  - Places and People
- Relationships
- Node Matrices
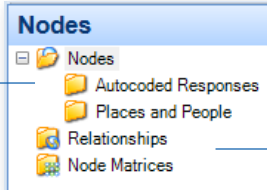
Relationships and node matrices are special types of nodes—refer to NVivo Help for more information

## Code at existing nodes

As you explore your sources, you can code at the nodes you have created:

1  Open a source in Detail View.

2  Select the content that you want to code. The content you can select depends on the type of source you are working with. Refer to the NVivo Help for information about coding in different source types.

3  On the **Analyze** tab, in the **Coding** group, under **Code Selection At**, click **Existing Nodes**.

4  From the **Select Project Items** dialog box, locate and select the nodes you want to code at.

5  Click **OK**.

You can also:

- Use 'drag and drop' to code at an existing node—select the content you want to code and drag it to the node in List View.

- Use keyboard shortcuts to code content—refer to the NVivo Help for more information about NVivo keyboard shortcuts.

- Use the Quick Coding bar (at the bottom of Detail View) to code content at existing nodes:

Enter the node name          ...or select nodes

In  Nodes          Code At  water quality          X

...and click code
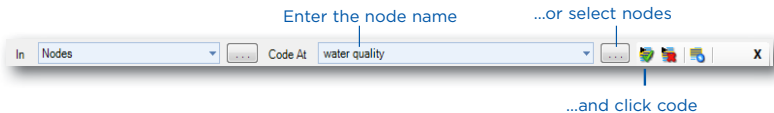
## Create nodes as you code

As you explore your sources you can create and 'code at' new nodes:

1   Open a source in Detail View.

2   Select the content that you want to code. The content you can select depends on the type of source you are working with. Refer to the NVivo Help for information about coding in different source types.

3   In the **Analyze** tab, in the **Coding** group, under **Code Selection At**, click **New Node**.
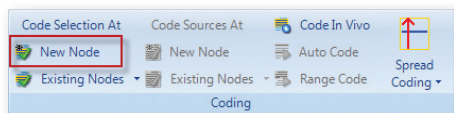


The **New Node** dialog box opens.

4   If you want to change the folder location for the node, click the **Select** button.

5   Enter a name and description.

6   Click **OK**.

When you create a new node it is added to the selected location in the node hierarchy—you can reorganize and work with the node in List View.

You can also use the Quick Coding bar (at the bottom of Detail View) to code selected content at new nodes



Enter a new node name          Click the code button
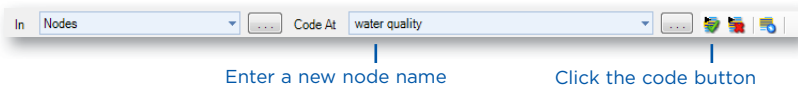
**Note:** You can also use 'in vivo' coding to create and code at new nodes—the selected word or phrase is used to name the node and is (at the same time) coded at the node. This is useful if you want your nodes to reflect the language of the people you have interviewed. Refer to the NVivo Help for more information.

## See what you have coded

To see what has been coded in a source, you can:

- Turn on coding highlight—on the **View** tab in the **Coding** group, click **Highlight**, and then select a highlight option.
- Turn on coding stripes—on the **View** tab in the **Coding** group, click **Coding Stripes**, and then select an option. Coding stripes are displayed on the right of the source:
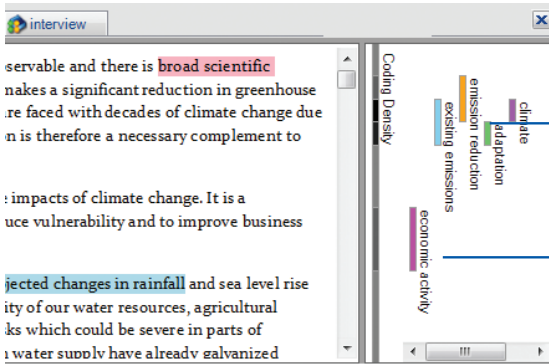


You can right-click on a stripe to open a node

Coding stripes can reflect the colors you have assigned to nodes—refer to the NVivo help for more information about using color in your project

## Auto code structured sources like interviews and surveys

If you have structured data, you can take advantage of NVivo's auto coding features. For example, you could auto code:

- A survey dataset to gather all the answers to each question.
- A collection of interview documents where participants are all asked the same set of questions. You can auto code these documents if you have used consistent paragraph styles.

Refer to the NVivo Help for more information about auto coding.

## Quick code with Text Search queries

You can use NVivo queries to automatically code your sources based on the words or phrases they contain. This can be a useful starting point for reviewing your data. For example, you could run a Text Search query on the word *policy* and automatically code all occurences. You can search for exact words, phrases or similar concepts, For example, search for *fish* and find *trout*, *mullet*, and *crab*.

To create a Text Search query—on the **Explore** tab, in the **Queries** group, click **New Query**, and then click **Text Search** and enter the text. On the **Query Options** tab, under **Results**, select a new or existing node to code at. Refer to the NVivo Help for more information about the options you can choose.

To get a visual perspective, you can display the results of a Text Search query as a word tree:
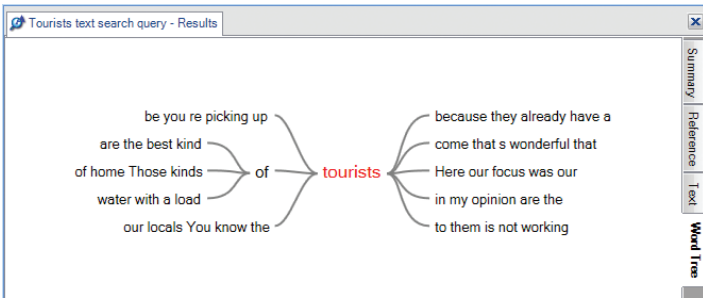


**Note:** You can also run a Word Frequency query to see the words that occur most often—for example, if the word *housing* appears frequently you can save the context around each occurrence in a node for further investigation. You can display the results of a Word Frequency query in a tag cloud. Refer to the NVivo Help for more information.

## Open a node to explore the references

You can open a node to see related references gathered in one place:

1  In Navigation View, click **Nodes**.

2  In List View, double-click the node you want to explore. The node is opened in Detail View:

You can see what sources were coded and click on the link to open a source

You can set options to display more or less of the context around a reference



The Reference tab is displayed by default, it shows all the text content coded at the node

Click on these other tabs to see content from pictures, PDF, audio, video and datasets

You can select content and 'code on' to new nodes

## Classify your nodes

Projects typically contain nodes for themes or topics but they may also have nodes for people, organizations or other 'cases'. For example, consider this passage of text:

*It's the fact that commercial fishermen make up the fiber and the backbone of this community. It's the fact that you have little bungalows like this instead of the mansions that we find mandated, practically, over on the beach. So it's still a sense of community.*

You might code the passage at the following 'theme' nodes:

- commercial fishing
- real estate development
- community

To collect descriptive information about the speaker, you could also code the passage at a 'case' node:

- Charles *(male, aged 40)*

Unlike theme nodes, this node has demographic attributes—you specify these attributes by 'classifying' the node. As you code more content at classified nodes you can use queries to ask meaningful questions—*How do men feel about the change in their community? Do their attitudes differ from those of women?*

To classify a node, you define it as a *person* or *organization* and specify the attributes. Each classification has its own set of attributes—you can use one set of attributes to describe people (*age*, *occupation* and so on) and another to describe places (*size*, *population*).

### Add node classifications to your project

Before you can classify nodes, you need to add at least one node classification to your project:

1   On the **Create** tab, in the **Classifications** group, click **Node Classification**.
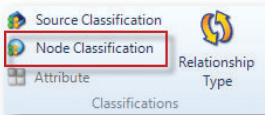


2   In the **New Classification** dialog box, select the type of classification you want to add:

- To add your own custom classification, select **Create a new classification** and enter a name and description.
- To add one of NVivo's ready-made classifications, select **Add one or more predefined classifications to the project** and select the check boxes for the required classifications.

3   Click **OK**.

**Note:** Predefined classifications come with a set of attributes—for example, *Person* has attributes for *age*, *occupation* and so on. Custom classifications do not have default attributes but you can add your own—select the classification and on the **Create** tab, in the **Classifications** group, click **Attribute**.

### Classify a node

When you have created the classifications you need, you can classify your nodes:

1   In List View, select the node you want to classify.

2   On the **Home** tab, in the **Item** group, click **Properties**.



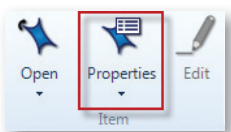3   In the **Node Properties** dialog, click the **Attribute Values** tab.

4   From the **Classification** list, select the classification for the node.

5   Click the arrow in the **Value** field to select a value for each attribute. To add a value, click in the **Value** field and enter a new value.

6   Click **OK**.

### Work with classification sheets

Classification sheets provide an overview of the items in a particular classification. For example, if you have created nodes for interview respondents and classified them as *Person*, you can double-click on the classification to quickly see the spread of your respondents:

Apply filters to see a subset of your data    Click in a cell to update attribute values



| | C : Township | D : Community | E : Generation... | F : Commerci... | J : Age Group | K : Gender | L : Education Level |
|---|---|---|---|---|---|---|---|
| 16 : DE002 | Harkers Island | Harkers Island | 3 or more | No | 60 - 69 | Female | Some trade school/community college |
| 17 : DE003 | Marshallberg | Marshallberg | 3 or more | No | 50 - 59 | Female | Some undergraduate college |
| 18 : DE004 | Smyrna | Williston | 3 or more | No | 50 - 59 | Female | Completed trade school/community co |
| 19 : DE005 | Straits | Gloucester | 1 | No | 40 - 49 | Male | Completed undergraduate college |
| 20 : DE006 | Straits | Bettie | 3 or more | No | 60 - 69 | Male | Completed high school |
| 21 : DE007 | Marshallberg | Marshallberg | 3 or more | Yes | 50 - 59 | Female | Completed trade school/community co |
| 22 : DE008 | Straits | Otway | 1 | Yes | 50 - 59 | Male | Some trade school/community college |
| 23 : DE009 | Marshallberg | Marshallberg | 3 or more | No | 60 - 69 | Female | Completed high school |
| 24 : DE010 | Stacy | Stacy | 3 or more | No | 60 - 69 | Female | Some undergraduate college |
| 25 : DE011 | Stacy | Stacy | 3 or more | No | 50 - 59 | Female | Completed trade school/community co |
| 26 : DE012 | Smyrna | Williston | 2 | No | 60 - 69 | Female | Completed trade school/community co |
| 27 : DE013 | Straits | Straits | 3 or more | No | 50 - 59 | Male | Completed high school |
| 28 : DE014 | Straits | Bettie | 1 | Yes | 60 - 69 | Male | Completed trade school/community co |
| 29 : DE015 | Sea Level | Sea Level | 3 or more | No | 60 - 69 | Male | Some undergraduate college |
| 30 : DE016 | Sea Level | Sea Level | 3 or more | No | 70 - 79 | Male | Some graduate school |
| 31 : DE017 | Cedar Island | Cedar Island | 3 or more | Yes | 50 - 59 | Male | Some trade school/community college |
| 32 : DE018 | Straits | Gloucester | 3 or more | Yes | 30 - 39 | Female | Completed trade school/community co |
| 33 : DE019 | Sea Level | Sea Level | 3 or more | Yes | 50 - 59 | Male | Completed trade school/community co |
| 34 : DE020 | Straits | Straits | none | No | 60 - 69 | Male | Completed trade school/community co |
| 35 : DE021 | Cedar Island | Cedar Island | 3 or more | No | 80 - 89 | Male | Some high school |
| 36 : DE022 | Atlantic | Atlantic | 3 or more | Yes | 70 - 79 | Female | Completed high school |
| 37 : DE023 | Atlantic | Atlantic | 3 or more | Yes | 50 - 59 | Female | Completed trade school/community co |

# Record your insights and ideas

As you explore your sources and nodes, you can:

- Add annotations to capture comments and reminders—on the **Analyze** tab in the **Annotations** group, click **New Annotation**.
- Create memos—on the **Create** tab, in the **Sources** group, click **Memo**. Provide a name for the memo and click **OK**. Enter the memo content in Detail View. You can link the memo to a source or a node, refer to the NVivo Help for more information about working with Memos.
- Create 'see also' links between related items—a great way to point out contradictions or follow evidence—on the **Analyze** tab in the **Links** group, click **See Also Link**, and then click **New See Also Link**.

**Note:**

- Typically, you create memos in NVivo as your insights and ideas emerge, but you can also import them in much the same way as documents—on the **External Data** tab, in the **Import** group, click **Memos**.
- Refer to the NVivo Help for more information about annotations, memos and 'see also' links.

# Explore trends and test theories

As your coding progresses, you can use queries, charts and visualizations to help you see what is happening in the data.

## Use queries to explore your coding

Coding queries can help you to test ideas, explore patterns and see the connections between the themes, topics, people and places in your project. For example, you could use a coding query to:

- Gather material coded at combinations of nodes—for example, gather content coded at *water quality* and *recreational fishing* and explore the associations.
- Gather material from classified nodes with specific attribute values—for example, *what do fishermen think about the rise of tourism?*
- Search for content coded at multiple nodes and use operators to further refine the query—for example, gather content coded at *community change* where it overlaps with content coded at *real estate development*.
- Search for content that is not coded at a specific node—find content coded at *environmental impacts* but not coded at *negative attitude*.

To run a simple coding query:

1    On the **Explore** tab, in the **Queries** group, click **New Query**, and then click **Coding**.

     The **Coding query** dialog box opens with the **Simple** tab in focus.

2    Under **Search for content coded at** select:

- **Node** to search for content coded at a specific node—click the **Select** button to select the node,

- **Any node where** to search for content coded at nodes with specific attribute values—click the **Select** button to choose the attribute values. For example, you could search for content coded at towns where the population is greater than 300.

3    To find content coded by a specific user, select **By Any Selected Users**—click the **Select** button to select the user.

4    To change the scope of the query:

- In the **In** box, select which project items you want to include in the search—click the **Select** button to choose specific project items.

- In the **Where** box, limit the scope of the query by the users who created or modified the items—click the **Select** button to select the users.

5    To save the simple coding query, click the **Add to Project** check box and enter the name and description (optional) in the **General** tab.

6    Click **Run**.

The coded content that matches the query criteria is displayed as a node in Detail View.

You can also review and explore your coding using:

- **Matrix Coding Query**: creates a matrix of nodes based on search criteria. For example, *show me attitudes about water quality by community.*

- **Compound Query**: combines text and coding queries—search for specified text in or near coded content.

- **Coding Comparison Query**: compares the coding of two researchers or two groups of researchers. This is useful for teams who are interested in coding consistency and the questions posed by researcher disagreement.

## Display your data in charts

You can create a chart to present or explore the data in your project. For example, you could make a chart to see different communities' attitudes towards commercial fishing:
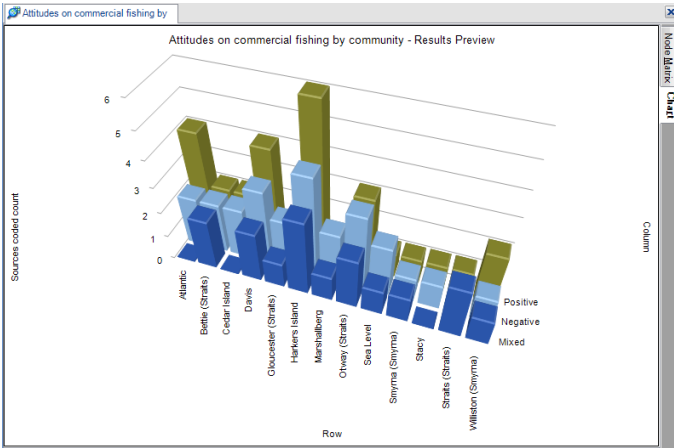


You can create a chart using the Chart Wizard or while working on other areas of your project—for example, you can create a chart based on a node, node matrix or source that you have opened in Detail View. You can also choose from a variety of chart types—3D bar, column, heat and so on. To launch the Chart Wizard—on the **Explore** tab, in the **Visualizations** group, click the **Chart** image. Refer to the NVivo Help for comprehensive information on working with charts.

## Create models or generate graphs to vizualize connections

You can create models or generate graphs to visualize, explore and present the connections in your data.
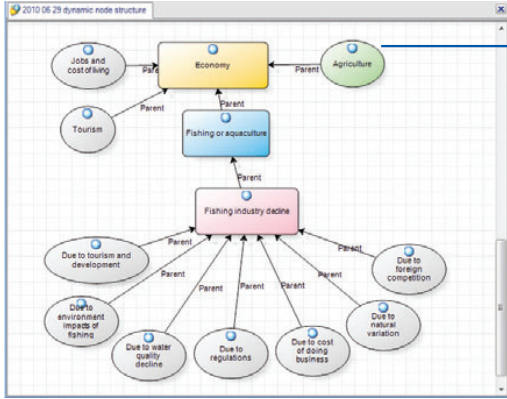
For example, you could create a model to plan your project and sketch your expectations or hypotheses. To create a model:

1   In **Navigation View**, click the **Models** button.

2   On the **Explore** tab, in the **Models** group, click **New Model.**

    The **New Model** dialog box is displayed.

3   Enter a name and description.

    The model canvas is displayed in Detail View:

Link shapes to items in your project—open items directly from the shape

You could also generate a graph to see how project items are connected. For example, you could see which items are connected to a selected source or node. To generate a graph:

1   In List View, click the source or node you want to graph.

2   On the **Explore** tab, in the **Visualizations** group, click **Graph**.

    The graph is displayed in Detail View:
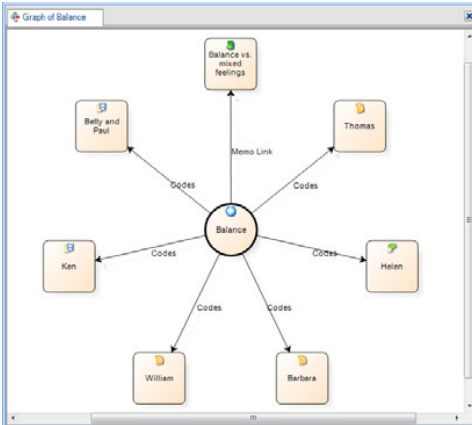


Refer to the NVivo Help for more information about working with models and graphs.

## Gain a different perspective using tree maps and cluster analysis

You can use other visualization tools to get a different perspective on what is happening in your data—for example:

- Use a tree map to compare nodes by the number of references they contain:
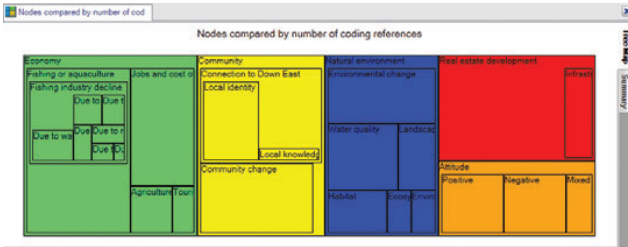


- Use cluster analysis to identify sources that contain similar concepts:
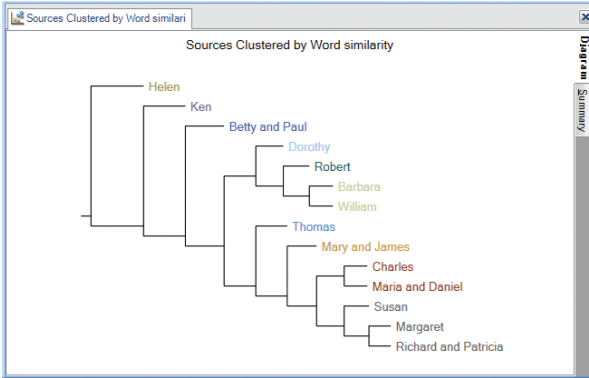


To create a visualization—on the **Explore** tab, in the **Visualizations** group, click the type of visualization you want to display. Refer to the NVivo Help for more information about working with tree maps and cluster analysis.

# Build reports to present and keep track of your project

As your project grows you can use reports to:

- Review and revise your progress
- Identify themes that are occurring more than others
- Present your findings
- Work with your data in other applications such as Excel or Word

Extracts allow you to export a collection of your data to a text, Excel or XML file—you can use this data for complementary analysis in other applications.

To run one of NVivo's predefined reports:

1 In Navigation View, click **Reports**, and then click the **Reports** folder.

2 In List View, double-click the report you want to run.

The report results are displayed in Detail View:



Use this view to navigate through the items in your report.

To create your own report—on the **Explore** tab, in the **Reports** group, click the **New Report** image. Follow the steps in the Report Wizard to choose the fields, filters and layout of your report.

You can also create your own report (or modify an existing one) using the Report Designer—refer to the NVivo Help for more information about working with reports.

# Share your findings with others

You can export data from NVivo to use in other applications—this can be useful when you want to share information with colleagues (who don't have NVivo) or when you are ready to present your findings. For example, you can export:

- Documents and memos as Word documents
- Bibliographic data to applications like EndNote, Zotero or RefWorks and use their features to insert citations and format your references.
- Extracts of data to applications like IBM SPSS Statistics—for example, export demographic data about the people, organizations or other 'cases' in your project
- Nodes or sources as HTML web pages—this lets you share not only text and images but video and audio too:
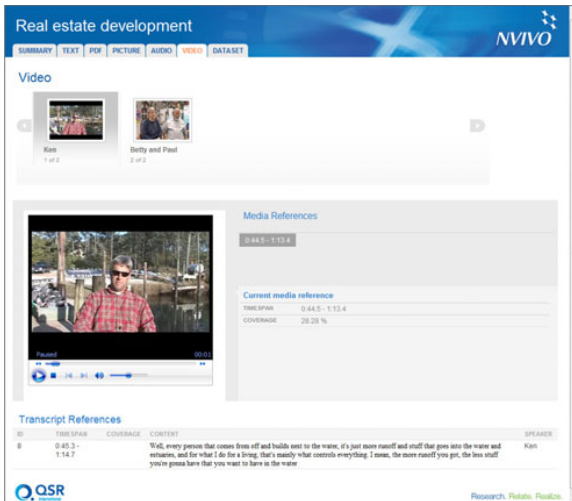


To export an item:

1 Open the item in Detail View

2 On the **External Data** tab, in the **Export** group, click **Export**.

3 Select the type of item you want to export.

4 Select the location and format for export and click **OK**.

Refer to the NVivo Help for more detailed instructions on exporting NVivo content.

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