

# NVIVO10 for Windows

## 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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## How to use this guide

This guide will help you to get up and running with NVivo. It provides step-by-step procedures for fundamental tasks, and suggests ideas and techniques to help you move forward with your project.

Hints, tips and techniques are displayed in these panels.

If you want to share your own tips and techniques — join us on the QSR Forum



ideas

For more information about working with NVivo refer to:

- NVivo Help—click the **File** tab, then click **Help** and then click **NVivo Help**.
- The QSR website ([www.qsrinternational.com](http://www.qsrinternational.com))—access video tutorials, the QSR forum, FAQs, training and support.
- The NVivo Users Group on LinkedIn or follow QSR International on Facebook or Twitter.

## NVivo and qualitative research

Many qualitative researchers are interested in evaluating, interpreting and explaining social phenomena. They analyze unstructured or semi-structured data like interviews, surveys, field notes, web pages and journal articles—and they work in a range of sectors; from social science and education to healthcare and business.

## What methodologies does NVivo support?

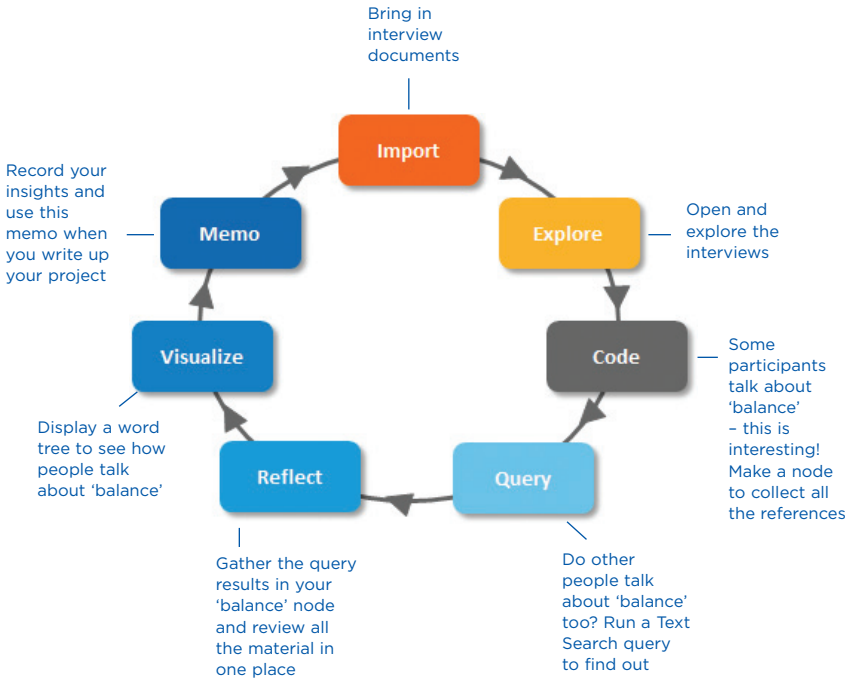
Researchers usually adopt a qualitative methodology to suit their research question. For example, a social scientist wanting to develop new concepts or hypotheses may take a ‘grounded theory’ approach. A health researcher looking for ways to improve policy or program design might use ‘evaluation methods’. NVivo doesn’t favour a particular methodology—it’s designed to facilitate common qualitative techniques for organizing, analyzing and sharing data—no matter what method you use.

## Qualitative vs Quantitative

Qualitative inquiry tends to focus on questions of 'how' and 'why' rather than the more quantitative perspective of 'how many' or 'how often'. While NVivo's main focus is on qualitative analysis, it does provide support for researchers who work with mixed methods. For example, you can analyze the open-ended questions in a survey and make comparisons based on demographic data—and you can exchange this data with applications like Microsoft Excel and IBM SPSS Statistics.

## How do I approach my research project?

There is no agreed 'industry standard' or prescribed process for approaching a qualitative project but there are some recognized strategies and steps you can take—you'll find some suggestions as you work through this guide. It can help to understand that qualitative research is an iterative process—for example, this picture shows a path you might take when exploring a particular theme:



Remember that NVivo can help you to manage, explore and find patterns in your data but it cannot replace your analytical expertise.

## NVivo key terms

As you work through this guide you'll be introduced to a number of key concepts but here are some basic terms to get you started:

- **Sources** are your research materials including documents, PDFs, datasets, audio, video, pictures, memos and framework matrices.
- **Coding** is the process of gathering material by topic, theme or case. For example, selecting a paragraph about water quality and coding it at the node 'water quality'.
- **Nodes** are containers for your coding—they let you gather related material in one place so that you can look for emerging patterns and ideas.
- **Source classifications** let you record information about your sources—for example, bibliographical data.
- **Node classifications** allow you to record information about people, places or other cases—for example, demographic data about people.

## Explore 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 experiment with queries, visualizations and other analysis tools.

You can access the sample project from the **Recent Projects** list on the NVivo Welcome screen.

If you cannot see the sample project in the list, you can access it from the following locations:

- On Microsoft Windows XP: C:\Documents and Settings\All Users\Shared Documents\NVivo 10 Samples
- On Microsoft Windows Vista and Microsoft Windows 7 and 8: C:\Users\Public\Public Documents\NVivo 10 Samples

## Install and activate NVivo for Windows

Before installing, make sure that your computer meets the hardware and software requirements:

### 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 or later
- Approximately 2 GB of available hard-disk space (additional hard-disk space may be required for NVivo projects)

### 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, or Microsoft Windows 8
- Approximately 4 GB of available hard-disk space (additional hard-disk space may be required for NVivo projects)
- Internet Explorer 8 or later
- Internet connection

Additional requirements if you want to install and use NVivo's supplementary add-ons:

- For NCapture: Internet Explorer 8 or later, or Google Chrome 21 or later
- For the NVivo Add-In for OneNote: Microsoft OneNote (2007 or 2010) and Microsoft Word (2007 or 2010)



## Install NVivo

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

If you are running a 64-bit version of Windows 7 or Windows 8, you will have the option of installing a 32-bit or 64-bit version of NVivo 10. You should install the 32-bit version of NVivo if you want to work with .mov and .qt video files.

1. Locate and double-click the NVivo file that you downloaded—the installation process starts automatically. If you are installing from physical media, do one of the following:
  - Insert the NVivo 10 USB flash drive—in the root folder double-click 'NVivo 10 for Windows (32 bit).exe' or 'NVivo 10 for Windows (64 bit).exe'.
  - Insert the NVivo 10 DVD—if the DVD menu does not display automatically, double-click the file (NV10Menu.exe). Choose your preferred language and start the installation.
2. Follow the steps to:
  - Select your preferred language for the NVivo user interface (if prompted).
  - Install any prerequisite components. You may be asked to restart your machine—on restart the installation will continue automatically.
  - Accept the NVivo license agreement.
  - Confirm the location of NVivo program files and choose to include an NVivo icon on your desktop.
  - Choose the supplementary add-ons that you want to install. NCapture is a browser extension that allows you to gather material from the web. The NVivo Add-In for OneNote allows you to bring your OneNote content into NVivo.
3. Click **Install** and the installation confirmation is displayed.
4. Click **Finish**.

**Note:** If you work with audio and video files, you may need to install additional codecs—for more information, refer to the FAQs area of the QSR website ([www.qsrinternational.com](http://www.qsrinternational.com)).

## Start NVivo and activate your license

You need to activate your NVivo license—this is a simple and secure process that ensures valid licenses are used to operate the software.

If you are using a trial version of the software, you do not need to enter a license key, but you must activate the trial before you can use NVivo.

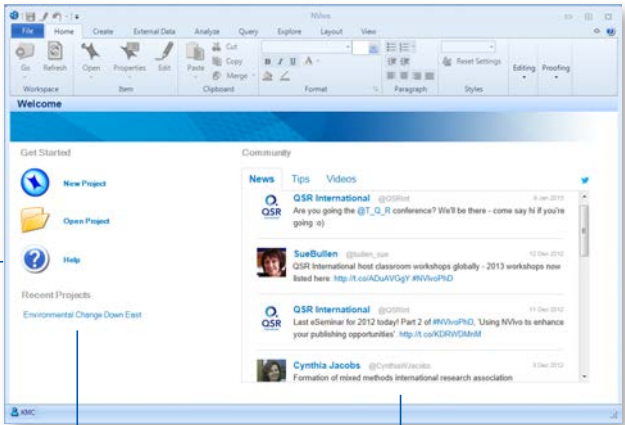
To start NVivo and activate your license:

1. Double-click the QSR NVivo 10 icon on your desktop.
2. In the **Welcome to NVivo 10** dialog box, choose to trial the software or enter your license key and click **OK**. You can find the key in the download email from QSR (or on your physical media case). To ensure accuracy, we recommend you copy and paste the license key from the email.

- In the **License Activation** dialog box, enter your details and click **Activate**—if you are connected to the Internet, you can activate immediately.
- In the **User Profile** dialog 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 teamwork in standalone projects.
- (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.
- Click **OK**. The **NVivo Welcome screen** is displayed:

Create a new project or open an existing one

Access comprehensive online help and link to other resources



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

Stay up-to-date with the latest news, tips and videos from the NVivo community

## 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.

- On the NVivo Welcome screen, click **New Project**. The **New Project** dialog box opens.
- Enter a name for this project (and add a description if you want to).
- Click the **Browse** button and in the **Save as type** list, make sure NVivo Projects (\*.nvp) is selected—you can change the default file name and location if you want to.
- Click **Save**, and then click **OK**.

## Open a project

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.

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

The **Open Project** dialog box opens.

2. Select **NVivo Projects** from the **File** or **Project type** list. If you are working with a server project, select **NVivo Server Projects** and then select the server from the **Connection name** box, then select the project you want to open.

3. Click **Open**.

**Note:** If you are working with server projects you may need to setup a server connection and check that you are permitted to access server projects—refer to the NVivo Help for more details.

## The NVivo Workspace

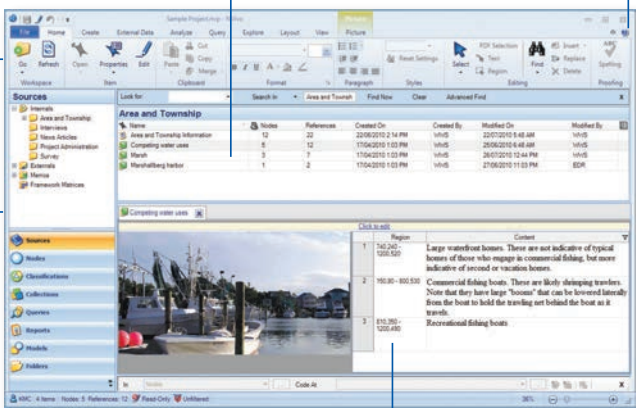
The NVivo workspace provides easy access to all your project material.

See the contents of a folder in List View

Access Help

The ribbon helps you to locate all NVivo commands

Navigation View lets you organize your material into folders

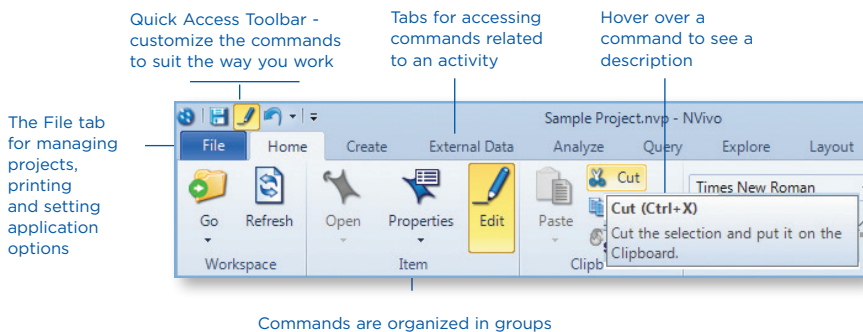


Check the status bar to see what is happening in your project

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.



## Navigation View

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



## 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								Classification
Name	Nodes	References	Created On	Created By	Modified On	Modified By		
Barbara	42	202	27/05/2010 9:03 PM	WWS	22/07/2010 6:32 AM	WWS		Interview
Betty and Paul	16	51	27/05/2010 1:49 PM	WWS	27/09/2010 10:58 AM	WWS		Interview
Charles	32	147	27/05/2010 9:03 PM	WWS	26/08/2010 2:18 PM	WWS		Interview
Dorothy	34	139	27/05/2010 9:03 PM	WWS	26/08/2010 2:18 PM	WWS		Interview
Helen	17	66	17/04/2010 12:59 PM	WWS	22/07/2010 11:49 PM	WWS		Interview
Ken	20	63	27/05/2010 1:36 PM	WWS	22/07/2010 11:49 PM	WWS		Interview
Margaret	29	84	27/05/2010 9:03 PM	WWS	26/08/2010 2:19 PM	WWS		Interview

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 an interview opened in Detail View:

Open multiple items and move through them using tabs

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

**Henry**  
*What do you value about the environment Down East?*

**Barbara**  
 How close the people are to the cycles of the – to the environment, people intimate with the environment which I appreciate, the knowledge of the water and the weather.  
 I enjoy the weather. It's so nice and mild. And I like hot summers. I like hot, humid summer on the water. I think it's a beautiful environment and beautiful landscape. It's not dramatic. I also love the Utah deserts and California. But I like this subtle, sublime sort of beauty here – the environment here.  
 I particularly enjoy being out on the water Down East. And my – he's not really my uncle, but a friend who I call an uncle – I just help him set his flounder nets and things like that. He does fishing, commercial fishing, but actually he's not commercial, just for his own freezer. And he knows everything about the water and just living off of the land – the seafood here.

In Nodes Code At

## Customize your workspace

You can arrange the workspace to suit the way you like to work. For example, you can minimize the ribbon or use the options on the **View** tab to:

- Hide Navigation View to make more room (ALT+F1).
- Display List View and Detail View side-by-side, this is particularly useful for drag and drop coding (see *Code at existing nodes* later in this guide).
- Undock Detail View into a separate window.

Refer to the NVivo Help for detailed instructions.

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### Early steps

Before you import your source material or get started with coding, you could take some time to:

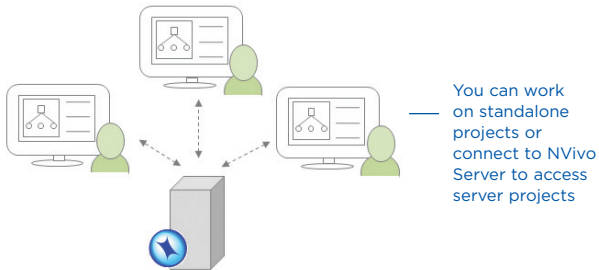
- **Prepare for auto coding**—if you have consistently structured sources like focus groups or interviews (that ask the same set of questions), you can apply paragraph styles to facilitate auto coding in NVivo. Refer to the NVivo Help for more information about how to do this.
- **Create a memo (journal)** and state your research questions and record your goals. Why are you doing the project? What is it about? What do you expect to find and why? What biases do you bring to the project? Update the journal regularly to stay focused and to show the evolution of your project.
- **Make a model** to show the relationships or patterns you expect to find in your data based on prior experience or preliminary reading—copy and paste it into your journal.



## Sharing projects in a team

Many projects involve multiple researchers working together—NVivo provides two ways to approach collaboration:

- Share projects using NVivo Server—everyone in your team can work on the same project at the same time. They can code, annotate and link source content and have immediate access to the changes made by other team members.



Or work in copies of a standalone project and merge them into a master project at appropriate intervals—making use of user profiles to track changes. You can find out more about this in the NVivo Help.

## Preparing for teamwork

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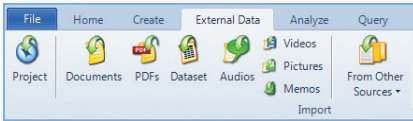
Whether you work with NVivo Server or collaborate in a standalone project you might want to consider the following:

- Appoint a team leader who will keep the team on track and make final coding decisions.
- Have regular team meetings to discuss interpretations, address issues and assign tasks—record the outcomes in a memo.
- Have each team member keep a memo to record their progress, including any hunches, suggestions or questions—you could also do this in a single ‘teamwork journal’.
- Early on, have multiple team members code the same collection of sources, then compare coding (using coding stripes or a coding comparison query)—this can help ensure a consistent approach.
- To start with, make a node hierarchy for each team member. After team discussion, you can refine, merge and reorganize.
- Aim for a clear node structure and use descriptions (in node properties) to make the purpose of a node clear for all team members.

## Bring your material into NVivo

Sources are the materials that you want to analyze in NVivo—they can include articles, interviews, survey results, audio/video recordings, pictures, web pages or social media content.

To import sources, use the options on the **External Data** tab:

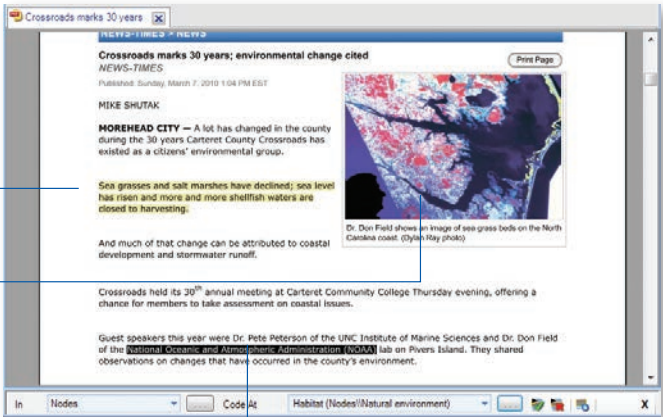


## Interviews, articles and other documents

You can import interviews, journal articles, reports and any other Word documents or PDFs:

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

In PDFs you can also select regions of the page, like 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)



## Survey results and other datasets

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:

- Connecting to SurveyMonkey and bringing in your survey results
- Importing data from a spreadsheet, text file or database table.
- Importing an NCapture file that contains social media data

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

The screenshot shows a window titled "Survey Responses" containing a table of survey data. The table has five columns: ID, Respondent, ReturnDate, The water quality Down East is, and The natural environment Down East is. The data is as follows:

ID	Respondent	ReturnDate	The water quality Down East is	The natural environment Down East is
17	DE017	07/12/2004	getting worse	beautiful
18	DE018	08/12/2006	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
19	DE019	07/12/2004	very important	going to be destroyed if something is not done
20	DE020	11/12/2004	good now, but could get poor very fast if not watched carefully	the best example of waterfront on the ocean and <u>sound on the East coast</u>
21	DE021	09/12/2004	good	still in good shape
22	DE022	14/12/2004	growing worse	changing.

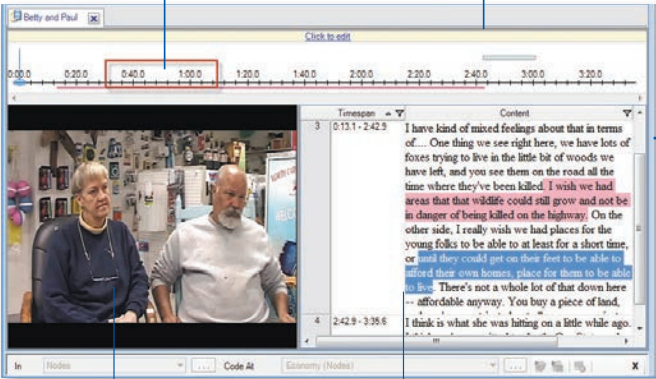
Annotations and navigation elements are shown with callouts:

- Apply filters to see a subset of the data:** Points to the filter icons above the table columns.
- Select a 'codable' column and gather the contents in a node:** Points to the "The natural environment Down East is" column header.
- View the dataset as a table or see each record in a form:** Points to the "Table" and "Form" view toggles on the right side of the table.
- Select content and code it at a node:** Points to the highlighted text "going to be destroyed if something is not done" in row 19.
- Add annotations or 'see also' links:** Points to the underlined text "sound on the East coast" in row 20.
- Navigate through the records:** Points to the navigation bar at the bottom of the table showing "1 of 2" records.

The bottom of the screenshot shows the NVivo interface with "Nodes" selected in the left pane and "Code At" set to "Environmental impacts (Nodes)\N".

## Audio and video

You can import audio and video in a wide range of formats—refer to the NVivo Help for a detailed list. You can play and analyze an audio or video source in Detail View:



Code directly on the timeline

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

Work with imported videos or videos from YouTube

Select content and code it at a node

A transcript is optional—you can transcribe in NVivo, import a transcript from Word or purchase a transcript from within NVivo

When recording audio or video it's a good idea to reduce background noise, have one person speak at a time and place the microphone in a good position.

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. When you import media files you can choose to store them inside or outside your project—if you have many large videos, we recommend you store them outside the project so that software performance is not compromised.

## Create your own transcripts

You can transcribe your media files in NVivo. In 'transcribe mode', you can play and pause the media—transcribing as you listen and NVivo will automatically add new rows and timestamps. To support this process, you can also use a foot pedal and keyboard shortcuts.

If you have already transcribed the material in a Word document or text file (with correctly formatted timestamps) you can import the transcript into the audio or video source.

When it's time to code the material, you can code the media directly (on the timeline) or you can code the transcript.

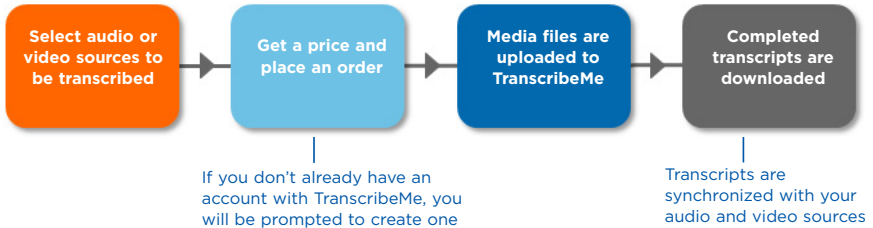
Refer to the NVivo Help for more information about creating transcripts.

## Get your materials transcribed

Creating your own transcripts may bring you closer to your data but it can also be labor intensive and time consuming. Instead, you can have your media files professionally transcribed using TranscribeMe—an integrated transcription service that offers:

- Fast turnaround times
- Security and confidentiality
- Competitive transcription rates
- High quality, accurate transcripts in an 'NVivo-ready' format
- Automatic and seamless download of transcripts into your NVivo project

You can order and purchase transcripts without leaving the NVivo application:



TranscribeMe provide transcriptions in a variety of languages—you can check the available languages at the time you place your order.

You will need NVivo 10 for Windows Service Pack 5 or later to use this feature.

## Photos and other images

You can import photos or other images and analyze them in NVivo—refer to the NVivo Help for a detailed list of supported image formats.

A picture source consists of a picture and a text log:

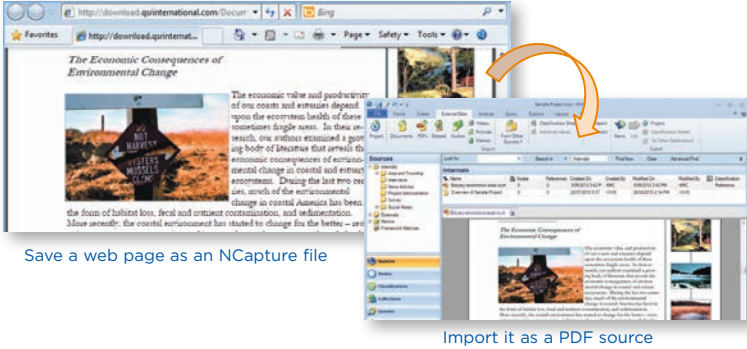
Code directly on the picture

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

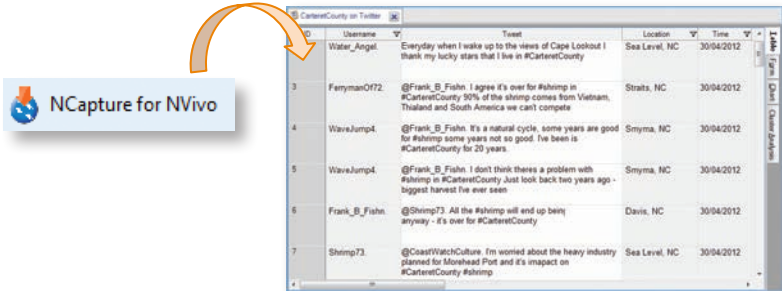
	Region	Content
1	740,240 - 1200,520	Large waterfront homes. These are not indicative of typical homes of those who engage in commercial fishing, but more indicative of second or vacation homes.
2	150,80 - 800,530	Commercial fishing boats. These are likely dumping rawfish. Note that they have large "booms" that can be lowered laterally from the boat to hold the trawling net behind the boat as it travels
3	810,350 - 1200,490	Recreational fishing boats

## Web pages, social media and YouTube videos

NCapture is a browser extension that lets you clip web pages and import them as PDF sources in your NVivo project.



You can also capture social media conversations (from platforms like Facebook, Twitter or LinkedIn)—and store them as PDF or dataset sources. Having content in a dataset means you can sort, filter and auto code (for example, you could gather Tweets by location).



Store social media content in a dataset

Using NCapture, you can also capture YouTube videos and then work with them in NVivo. You may also want to import any comments as a dataset.

For detailed instructions about installing and using NCapture, refer to the NVivo Help.

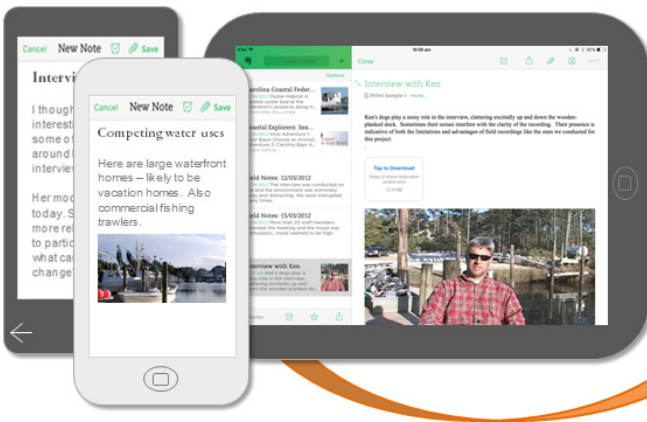
## Collect data on mobile devices (with Evernote)

When working in the field, you may want to collect data on a mobile device. For example, you could use your smartphone or tablet to:

- Record audio or video interviews
- Snap photos of participants, white-board diagrams or research settings
- Clip web pages and gather articles online
- Make notes to record field observations, ideas and insights

You can use Evernote (a popular cloud-based app) to gather and organize this data when you're out and about. When you're back at your desk, you can connect to your Evernote account (from within NVivo) and import the material.

Use Evernote to gather material on your smartphone or tablet (Android and iOS)



Then easily bring individual notes or whole notebooks into NVivo. You may also want to convert your tags to nodes.



Refer to the NVivo Help for more information about importing content from Evernote.

## Import from OneNote

If you use OneNote, you can use the NVivo Add-In for OneNote to export your pages (to a .nvovz file) and bring them into NVivo.

Refer to the NVivo Help for detailed instructions.

## Bibliographical data

If you have conducted a literature review using a bibliographical application like EndNote, Mendeley, RefWorks or Zotero—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.

### Source classifications

You can also record bibliographical information 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.

### Literature reviews in NVivo – keeping everything in one place

ideas

Using NVivo for your literature review can be a great way to learn the software and get started with a project. You can bring in your journal articles and:

- Organize them in a source folder called 'Literature'.
- Code each article to gather material by theme—you might also want to make nodes for 'statistics', 'good quotes' and 'definitions'.
- Annotate as you read, marking content for follow-up or further exploration.
- Use memos to describe the key themes and critique the articles.
- Use source classifications to assign attributes like publication date and author (you can also import these from reference management software like Endnote). Then use queries to find everything an author wrote about a theme or everything that was written before a certain date.
- Use a Word Frequency query to see what common terms are being used.
- Use a Matrix Coding query to find gaps in the literature—what themes are already heavily discussed and which provide scope for further exploration?

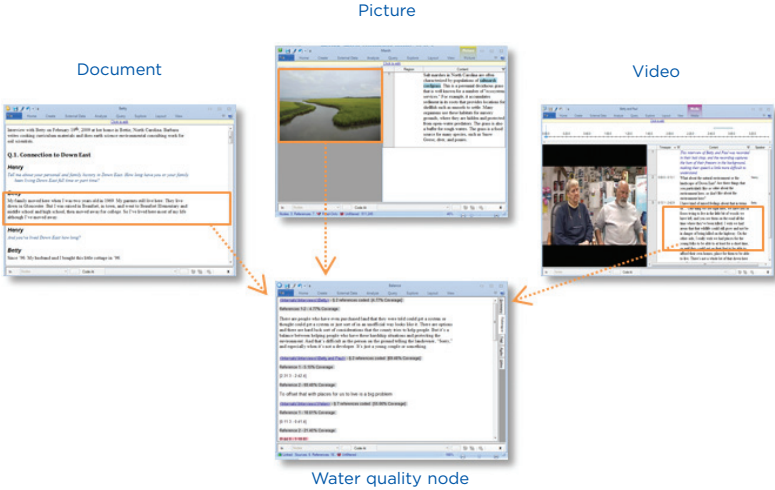
### Create externals for the things you can't import

Externals are 'proxies' for the material you cannot import into NVivo such as books, or physical artifacts. You can create an external source (that looks like a document) and summarize the content of the item—for example, you might enter key points from a PowerPoint presentation or summarize the chapters in a book.

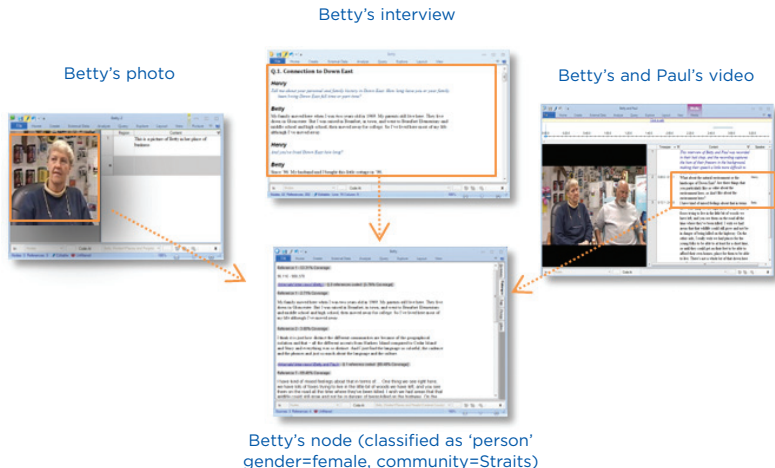
You can then code or annotate this content. If the external represents a file on your computer, you can create a link to the file and easily open it from within NVivo.

## Coding and making nodes

You can 'code' your sources to gather material about particular themes and topics— 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 also code to gather material about a person, place or other case:



Betty's node (classified as 'person' gender=female, community=Straits)

## Approaches to coding

The way you approach coding depends on your methodology and research design but here are some ideas to get started:

- Start with 'broad-brush' coding to organize the material into broad topic areas (you can use Text Search queries to help with this)—then explore the node for each topic and do more detailed coding. For example, gather all the content about *water quality* and then explore the node looking for interesting perceptions, contradictions or assumptions.
- Or, you could get straight into detailed coding (making nodes as you need them) and then, later on, combine and group your nodes into related categories.
- As you reflect on a piece of content, think about these different types of coding:
  - Topic coding—What is the topic being discussed? For example, *water quality*, *real estate development*, *tourism* and so on.
  - Analytical coding—What is this content really about? Why is it interesting? Consider the meaning in context and express new ideas about the data. For example, *ideals vs reality*, *tension between developers and residents*.
  - Descriptive or 'case' coding—Who is speaking? What place, organization or other entity is being observed?

## Add nodes before you start coding

If you already know what themes you are looking for (based on your literature review, for example)—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.
5. You can add 'child' nodes (sub-nodes) under the new node and create a node hierarchy:

The 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

Nodes			
Name	Sources	References	
<input checked="" type="checkbox"/> Economy <ul style="list-style-type: none"> <li><input type="checkbox"/> Agriculture</li> <li><input type="checkbox"/> Fishing or aquaculture</li> <li><input type="checkbox"/> Jobs and cost of living</li> <li><input type="checkbox"/> Tourism</li> </ul>	24	277	
	8	20	
	18	168	
	15	76	
	7	12	

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



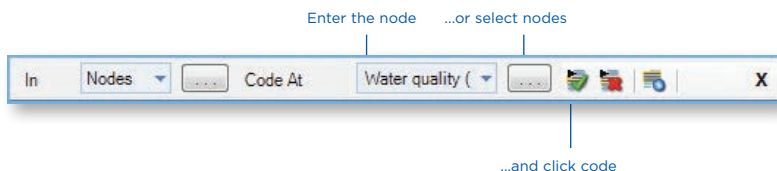
## Code at existing nodes

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

1. Display your nodes in List View and open a source in Detail View. You may want to display Detail View on the right—on the **View** tab, in the **Workspace** group, click **Detail View**, and then click **Right**.
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. Drag the selected content to the node.

You can also code by:

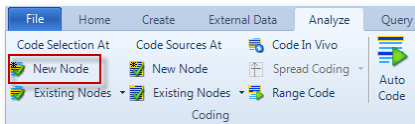
- Clicking options on the ribbon—on the **Analyze** tab, in the **Coding** group, click **Existing Nodes**.
- Using keyboard shortcuts—refer to the NVivo Help for more information about NVivo keyboard shortcuts.
- Using the Quick Coding bar (at the bottom of Detail View) to code content at existing nodes:



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



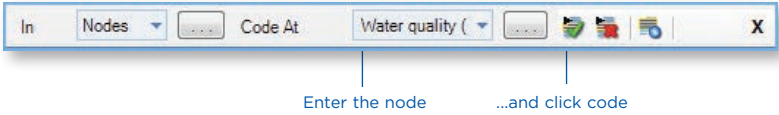
The **New Node** dialog box opens.

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:



## Make a node from a selected word (In Vivo code)

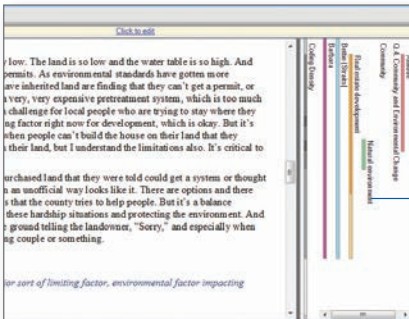
You can also use 'in vivo' coding to create and code at new nodes—the selected word or phrase is used to name the node and is (at the same time) coded at the node. This is useful if you want your nodes to reflect the language of the people you have interviewed.

1. Select the text content you want to code.
2. On the **Analyze** tab, in the **Coding** group, click **Code In Vivo** (or click Code In Vivo on the Quick Coding bar).

## 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

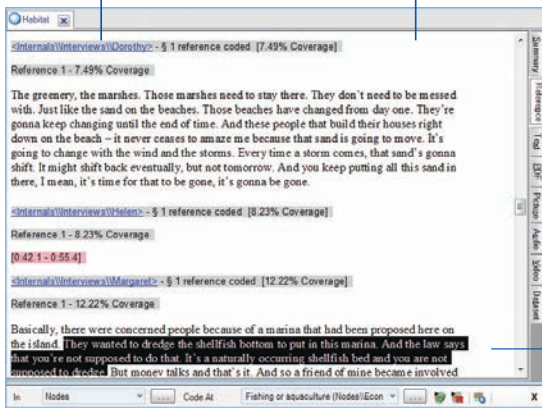
## Open a node to explore the references

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, PDFs, audio, video and datasets

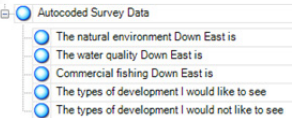
You can select content and 'code on' to new nodes

## Quick coding based on style or structure

Interview documents can be auto coded based on style or structure—for example, if participants are all asked the same set of questions, you can auto code the interviews based on paragraph styles.

Datasets can be quickly coded based on their structure too—for example, you can auto code a survey dataset to gather all the answers to each question.

ID	Respondent	ReturnDate	The natural environment Down East is	The water quality Down East is	Commercial fishing Down East is
9	DE009	15/12/2004	needed to keep the natural look of the area.	getting worse as time goes on with no control on development.	an important part of everyday life that is going away!
10	DE010	11/12/2004	worth preserving	not good - believe run off from last industry - due to bad water quality	[?] and farms have damaged quality
11	DE011	03/12/2004	as good as when I was a kid	pristine	fading and needs to be revived by way of coop
12	DE012	15/12/2004	fragile	deteriorating	a dying industry
13	DE013	09/12/2004	in need of good stewards	good	
14	DE014	18/12/2004	threatened	very good until fur [unclear] development with	Almost gone due to public ramps and tourists with jet [unclear]



In survey results, you can auto code to gather the answers to each question.

## Quick thematic coding based on existing coding patterns

If you have a large amount of interview or survey data to code, then you may find pattern-based coding useful.

When you auto code based on existing coding patterns, NVivo uses machine learning algorithms to perform 'broad-brush' coding of text passages that contain similar words to previously coded content.

For example, if you have a node containing many answers to an open-ended survey question—you can start by manually coding about ten percent of the responses at descriptive nodes.

The screenshot shows the NVivo interface. On the left, a list of references is displayed with their coverage percentages. On the right, a coding scheme is visible with nodes like 'Ecosystem services', 'Water quality', and 'Natural environment'. An orange arrow points from the coding scheme to the auto-coding results table.

Reference	Coverage
Reference 12	0.19%
Reference 13	0.19%
Reference 14	0.19%
Reference 15	0.19%
Reference 16	0.19%
Reference 17	0.19%

Node	Count
1: Community	10
2: Community/Community change	5
3: Community/Connection to Down East	4
4: Economy	10
5: Economy/Agriculture	6
6: Economy/Fishing or aquaculture	5
7: Natural environment	39
8: Natural environment/Ecosystem services	5
9: Natural environment/Environmental change	5
10: Natural environment/Landscape	27
11: Nodes\\Natural environment\\Water quality	12

Then (based on this pilot coding) you can auto code the rest of the responses—NVivo displays the results in a matrix and you can refine the coding.

Pattern-based coding is an experimental feature that you can test and try out (we recommend you use NVivo 10 for Windows Service Pack 5)

Refer to the NVivo Help for more detailed information on pattern based auto coding.

## Quick coding 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 *fish* and automatically code all occurrences. You can search for exact words, phrases or similar concepts. For example, search for *fish* and find *trout*, *mullet*, and *crab*.

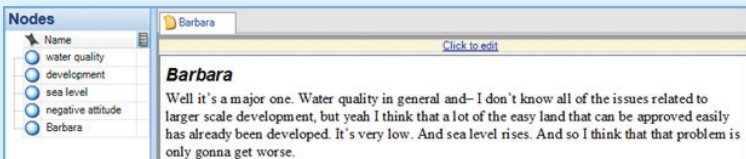
To create a Text Search query—on the **Query** tab, in the **Create** group, click **Text Search**. Refer to the NVivo Help for more information about the options you can choose.

**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.

### Coding tips



- Remember that you can (and should) code content at multiple nodes. For example, you could code Barbara's comment at all of the nodes shown on the left:



- If you code all your interviews like this, then you can use queries to gather your material in different combinations. For example, show me:
  - All the content coded at *water quality and development*
  - Negative attitudes about *water quality*
  - What women said about *water quality*
- If you find an interesting phrase or theme in one interview, you can use a Text Search query to see if it appears in the other interviews—and automatically code the content.
- After exploring and coding a source, take some time to reflect on what you have discovered. Run a report to see which nodes have been used most often—how do these nodes relate to each other? Make a model to explore the relationships and record your thoughts in a memo.
- You may not need to exhaustively code all your material. For example, if after working through twelve interviews you are not finding any new themes or ideas—you may have reached 'saturation'. You could use Text Search queries to do some broad-brush coding in subsequent interviews.

## Memos, annotations and links

Memos are an integral part of the research process—and can be a great starting point when you come to writing-up your project. Memos are like documents and they can be linked to sources or nodes.

Annotations are like scribbled notes in the margin—they let you record comments, reminders or observations about specific content in a source or node.

Use 'see also' links to draw connections between items in your project. For example, you can use 'see also' links to point out contradictions, follow evidence or show a sequence of events.

### Creating a linked memo

To create a memo that is linked to a source or node:

1. Select the source or node in List View or open it in Detail View.
2. On the **Analyze** tab, in the **Links** group, click **Memo Link**, and then click **Link to New Memo**. The **New Memo** dialog box opens.
3. Enter a name for the memo.
4. (Optional) Enter a description of the memo.
5. Click **OK**. The memo is opened in edit mode and you can enter the content.

### Adding an annotation to selected content

To create an annotation:

1. Select the content you want to annotate.
2. On the **Analyze** tab, in the **Annotations** group, click **New Annotation**.
3. In the **Annotations** tab at the bottom of Detail View, enter the annotation.

### Adding a see also link

To add a see also link from content to another source:

1. Select the content you want to link from.
2. On the **Analyze** tab, in the **Links** group, click **See Also Link**, and then click **New See Also Link**.

## Memos - a crucial piece of the analytical puzzle

You can use memos to tell the story of your project—from your early ideas and assumptions to fully-fledged insights about a topic, person, or event. Use them to ‘talk to yourself’ as you make sense of your data.

Tracking your analytical process with memos can help you to increase the transparency and reliability of your findings. With your process recorded in memos, you can easily demonstrate the evolution of a theory or quickly call up data that supports client questions.

Memos are quite ‘free form’ in NVivo and our innovative users (from the LinkedIn NVivo Users Group) have come up with some great uses for them:

- **Project memo**—record your goals, assumptions and key decisions. Like a journal, update it regularly and include links to the significant theme nodes and sources. Bring your journal to life by displaying it in a model.
- **Interview or participant memo**—summarize the key points of an interview. Make note of contradictions, surprises or early hunches. Include ideas about the nodes you might make and include photos or descriptive information about the interview setting.
- **Node memo**—explain why you think a theme is significant (especially useful in team projects). Add to the memo as your thinking evolves and include links to the related literature. By writing as you go, you won’t face the pressure of staring at a blank document when it comes to writing up your project.
- **Query results memo**—what do these query results tell me? Make a memo to organize your ideas and to plan future steps. If you display your query results in a chart or other visualization, copy and paste it into the memo.
- **Analytical and procedural memos**—record your findings in analytical memos and use procedural memos to document the methodological steps you take.
- **NVivo memo**—record what works best in the software, including any tips or shortcuts you want to remember. Include links to NVivo-related support materials that you’ve found on the web.

## Work with demographic data

You can use 'node classifications' to capture the demographic details of the people, places or other cases in your project. For example, if you have interviewed people in a particular community, you may want to collect information about their age, gender and occupation—and compare their responses based on these attributes.

You can setup demographic data in NVivo or you can import it from a spreadsheet or text file.

### 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

## Import demographic attributes (classification sheets)

If you have demographic attributes in a spreadsheet or text file you can import this data and automatically classify the case nodes in your project. For example, to setup node classifications for your interview respondents, you could follow these steps:

1. Add the node classification *Person* to your project—on the **Create** tab, in the **Classifications** group, click **Node Classification**.
2. Select all your interviews in List View.
3. Right-click and click **Create as Case Nodes** and assign the *Person* classification. NVivo makes a new node for each interview and codes the content.
4. In your spreadsheet, make sure the interviewee names match the names of the nodes you just created.
5. Import the spreadsheet—on the **External Data** tab in the **Import** group, click **Classification Sheets**. NVivo automatically applies the attributes from the spreadsheet to the *Person* nodes.

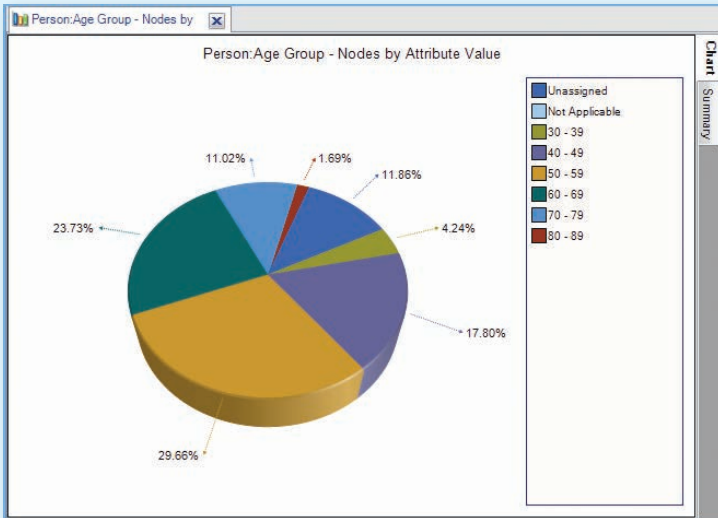
## Exploring people, places and other cases

NVivo provides tools for exploring the cases in your project, for example, you could:

- Use a matrix coding query to compare your respondent's comments based on demographic attributes:

	A : Person:Commercial Fishing = Yes ▾	B : Person:Commercial Fishing = No ▾
1 : Positive ▾	4	19
2 : Mixed ▾	0	6
3 : Negative ▾	31	127

- Create a chart to check the demographic spread of your respondents:



- After reviewing the content in a case node—make a model to visualize a participant's perceptions and to 'tell their story'.
- Make a memo to record your thoughts and insights about the case.

## Summarize your data in framework matrices

You can use framework matrices to summarize your data in a grid format—this is especially useful if you are working with interview or focus group transcripts.

The grid has rows for case nodes (for example, people you interviewed) and columns for theme nodes—you can enter your summary in the cells where the case and theme intersect. For example, you could summarize Anna's experience of volunteering:

Enter summary text in the cell

Associated View displays the content coded at the case

The screenshot shows a framework matrix for the theme 'Volunteering'. The matrix has four columns: A: experiences of volunteering, B: images of volunteers, C: meanings of volunteer work, and D: personal goals. It has four rows for different individuals: 1: Anna (Age Group = 20), 2: Fredric (Age Group = 30), 3: Bernadette (Age Group = 50), and 4: Merv. The cell for Anna in column A contains the text: 'Regular volunteer with Starlight Children's Foundation helping with fundraising and wish granting'. To the right, the 'Associated View' for 'Q.4 Volunteering experience' is displayed, showing interview questions and responses related to volunteering.

	A: experiences of volunteering	B: images of volunteers	C: meanings of volunteer work	D: personal goals
1: Anna Age Group = 20	Regular volunteer with Starlight Children's Foundation helping with fundraising and wish granting	Everyday person with passion for helping others and the	Providing resourcing assistance to others by giving your power,	Personal connection or experience with a cause (for example, cancer)
2: Fredric Age Group = 30	Used to help organize Church socials. Enjoyed it because I enjoyed interacting with like-minded people. Didn't feel like volunteer work because it	Community-minded person with plenty of spare time. Ones I know	Doing something for the community at no charge.	
3: Bernadette Age Group = 50	Involved in community groups. Helping injured wildlife and representing consumers in Mental Health.	Community minded, sharing people. Must beshare their energetic.	A way that people can share their abilities and skills to benefit	Volunteers are often connecte to a cause through a family connection. O
4: Merv	Meals on Wheels in late 1980's, but friend couldn't	Someone with time who is		Social side - s my friends and

**Q.4 Volunteering experience**

*Interviewer: Have you done any volunteer work?*  
**Anna:** Yes, I have. And I still do.  
*Interviewer: What did you do, and when?*  
**Anna:** am currently registered as a volunteer for the Starlight Children's regularly help with fundraising events and wish granting activities.  
*Interviewer: How was the experience?*  
**Anna:** The experience of granting a wish is extremely rewarding and real to earth. It's great to be able to make such a meaningful difference to a hardship – and provide them with memories that will last a lifetime. I have also assisted a big charity with their annual Christmas toy and ham be able to bring a smile to the faces of families at a time many of us take: certainly take part in this again in the future.  
 I have also taken part in tree planting for Landcare. This was quite differ volunteer work I had done. Gardening and the environment aren't high pr pastime activities, so it was a great opportunity to try something different doing my bit to make a difference for future generations.  
*Interviewer: Would you do more in future?*  
**Anna:** I would definitely consider volunteering in the future if I have the

Working with condensed source materials in the framework matrix can make it easier to:

- See everything about a theme by looking down a column.
- See how different themes relate to each other for a particular individual by looking across a row.
- Compare the experiences of different individuals by comparing one row to another.

Once you have condensed your source materials in a framework matrix, you can easily share your data with others by printing the matrix or exporting the matrix to a spreadsheet.

Before you can start working with framework matrices, you need to import your source materials, code source content to case nodes, and set up thematic node hierarchies. Refer to the NVivo Help for comprehensive information about working with framework matrices.



## Use queries to explore your coding

You can review and explore your coding using:

- **Coding Query:** gathers all the coding at any combination of nodes—for example, gather and explore all content coded at *water quality* and *tourism*, or find where content coded at *water quality* is near content coded at *tourism*.
- **Matrix Coding Query:** creates a matrix of nodes based on search criteria. For example, show me attitudes about *water quality by community*.
- **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.
- **Compound Query:** combines text and coding queries—search for specified text in or near coded content.
- **Group Query:** finds items that are associated in a particular way with other items in your project. For example, list the nodes that code a selection of sources.

### Making the most of queries

- Start running queries early on in the coding process—they can help you focus on the questions you want to ask (and prompt you to code accordingly). For example, if you want to ask “*How serious are the issues of water quality for local fishermen?*”—make sure you code at the node for *water quality* and code at case nodes with the *fisherman* attribute.
- Use coding queries to build-up and test ideas. For example, you have a hunch that people’s perception of water quality is closely tied to the pace of development. Create a query to gather all material coded at *water quality* where it is *NEAR* content coded at ‘development’.
- Use matrix coding queries to compare attitudes based on demographic attributes. For example, explore attitudes about *water quality* by community:

	A: Positive	B: Mixed	C: Negative
1: Atlantic	10	0	8
2: Bettie (Straits)	11	3	5
3: Cedar Island	4	0	2
4: Davis	6	0	5
5: Gloucester (Straits)	13	0	4

Double click a cell to see the coded content

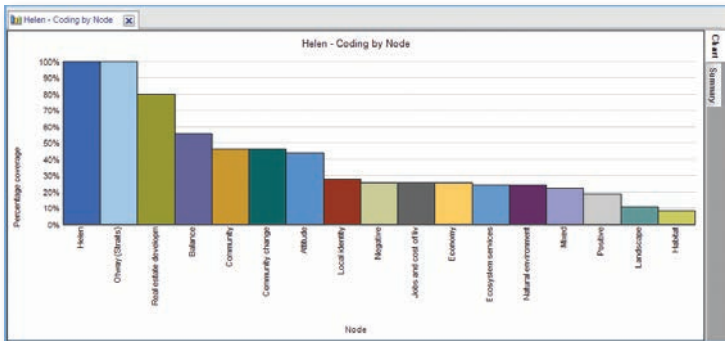
- Make a memo to record what you learn from a query—this can prompt you to ask further questions and facilitate deeper analysis. Link the memo to the query results.

## Visualize your project

NVivo lets you explore your data using charts, models and other visualization techniques. They can help you to explore trends, test theories and make sense of what is happening in your source materials.

### 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 the nodes that code a source:

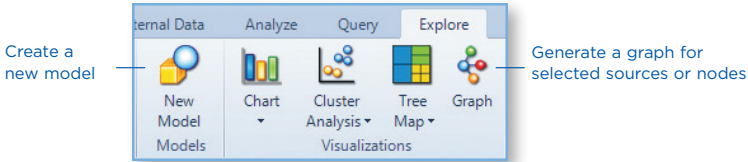


You can create a chart using the Chart Wizard or while working on other areas of your project—for example, you can create a chart based on a node, node matrix or source that you have opened in Detail View.

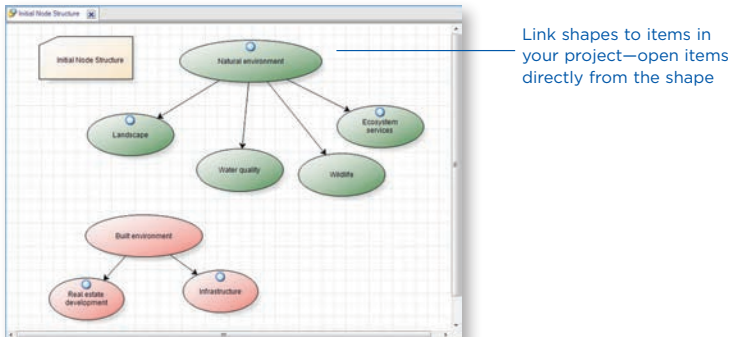
You can also choose from a variety of chart types—for example, 3D bar or column. To launch the Chart Wizard—on the **Explore** tab, in the **Visualizations** group, click the **Chart** image. Refer to the NVivo Help for comprehensive information on working with charts.

## Create models and graphs to visualize connections

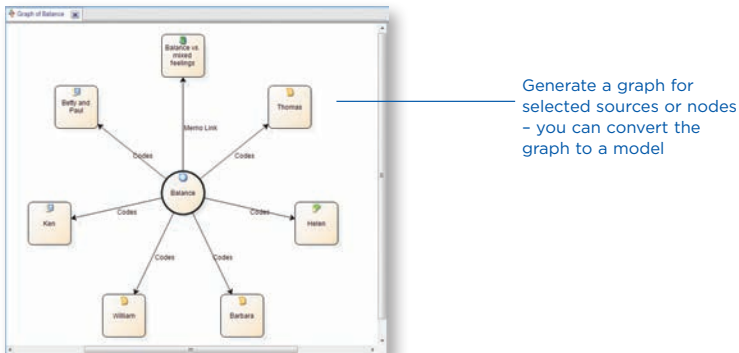
You can create models or generate graphs to visualize, explore and present the connections in your data. You can create models and graphs using options on the **Explore** tab:



You could create a model to plan your project and sketch your expectations or hypotheses:



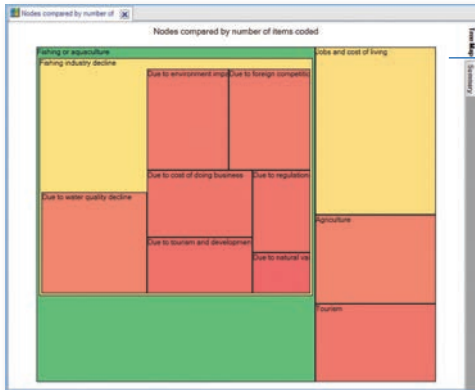
You could also generate a graph to see how project items are connected. For example, you could see which items are connected to a selected source or node.



## Work with tree maps and cluster analysis diagrams

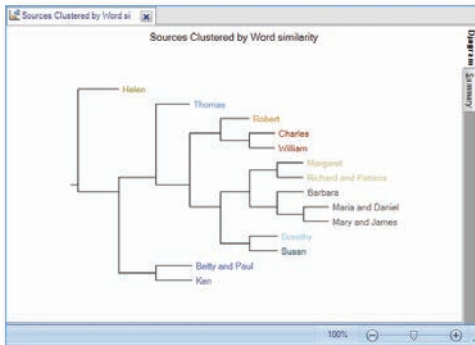
You can use other visualization techniques to get a different perspective on what is happening in your data—for example:

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



See patterns of coding in your project, or compare sources or nodes based on their attribute values

Use cluster analysis to group sources or nodes that share similar words, attribute values, or coding:



Click the Summary tab to see the values that were used to generate the diagram

As you work with sources, nodes or query results you can choose to visualize the data. For example, you can display a cluster analysis diagram for a social media dataset or display a tag cloud for the results of a Word Frequency query.

Refer to the NVivo Help for more information about working with visualizations.



## Create reports and extracts

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

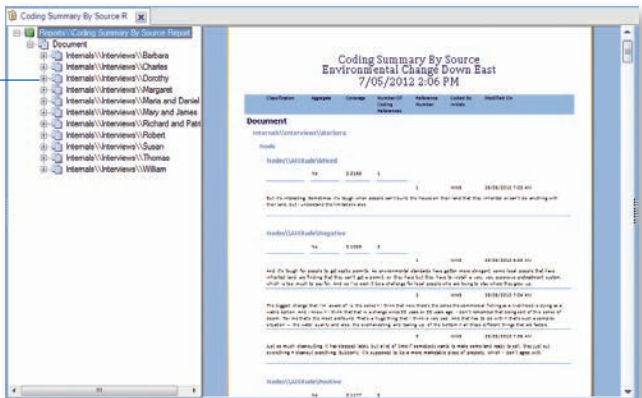
Extracts allow you to export a collection of your data to a text, Excel or XML file—you can use this data for complementary analysis in other applications.

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.



A series of 20 horizontal dotted lines spanning the width of the page, providing a guide for handwriting practice.

A series of 25 horizontal dotted lines spanning the width of the page, intended for handwritten notes.



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