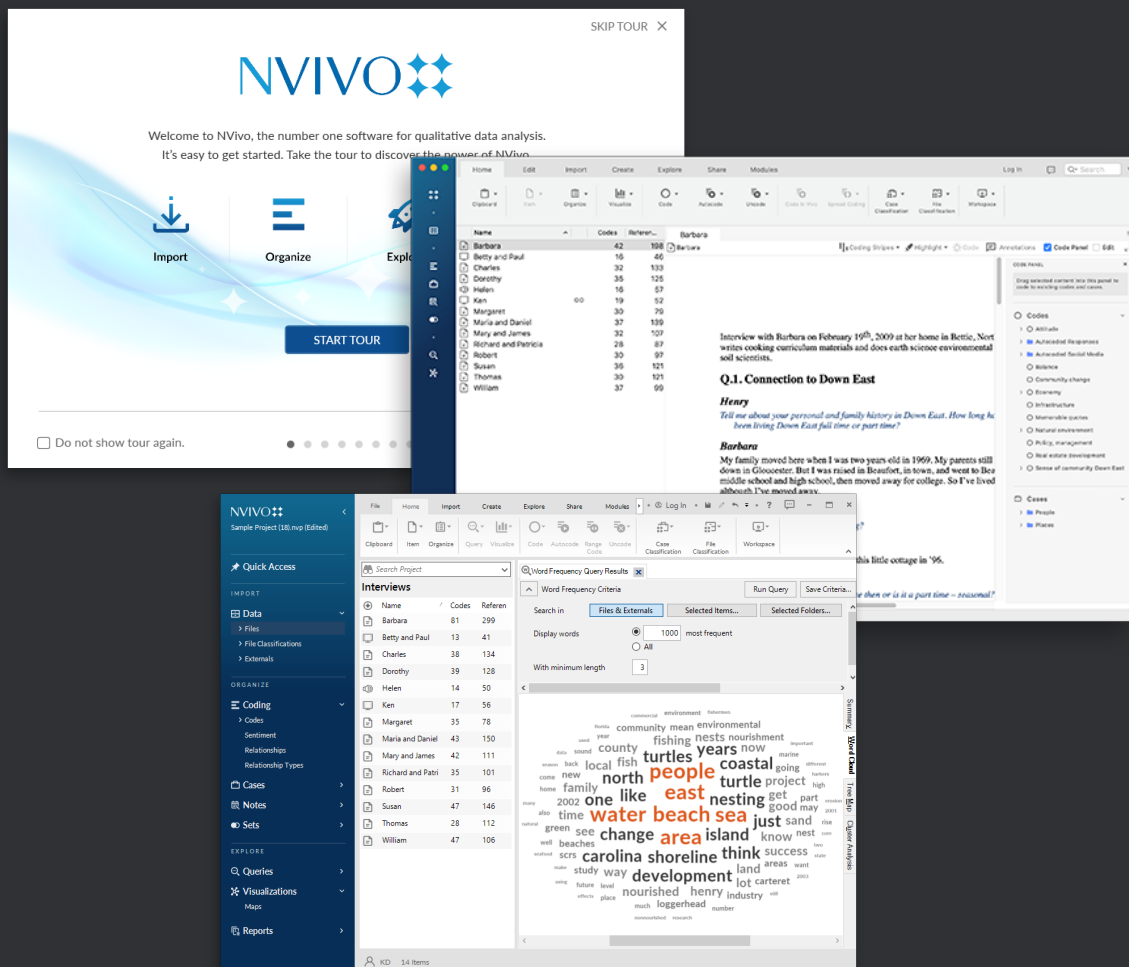




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NVivo Training Manual



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The NVivo Workspace



All instructions are for NVivo 14 and 15. Further details about NVivo and its functionality can be found at: <https://lumivero.com/products/nvivo/>.

NVivo utilises a ribbon along the top of the screen that allows you to select individual tabs linked to specific functions. Within the workspace there are three main views:

1. **Navigation View:** Allows you to organise and access project items. Note that when a new folder is accessed in Navigation View, if it is empty, a help file will appear with an explanation of that particular function – press the **Close** button when this appears.
2. **List View:** Displays the content of folders selected in Navigation View. This view also allows the addition of new items, plus the opening/editing of existing items.
3. **Detail View:** Displays the contents of opened items e.g. files or codes.

List View shows the contents of a folder

Project items can be organised and accessed in **Navigation View**

Commands are located in the **ribbon**

Check the **status bar** for useful information

Detail View allows you to view and work with files, codes or other project items

Note that the screenshot above is for the Windows version of NVivo, but the NVivo for Mac interface is identical.



There is an undo button in the top-right corner of NVivo for Windows (shortcut key = **Ctrl + Z**) that recalls your last five actions. Note that there is no 'redo' option!



To undo, Mac users will need to choose **Edit → Undo** (shortcut key = **⌘ + Z**)

Working with project items

- To **open a project item**, double-click its icon in List View and it will appear in Detail View.
- Multiple project items can be opened in Detail View at once in NVivo. To **switch between each item**, left-click on the tab belonging to the item.
- To **close an opened tab in Detail View**, left-click on the cross in the tab.
- To edit the name or description of a project item, right-click on the item you want to change and choose **[Item] Properties** (Windows) or **Get Info** (Mac). This will open a properties window, allowing you to make the required changes.
- To **move a project item**, drag and drop it to a new location.
- To **delete a project item**, right-click on its icon in List View and choose **Delete** from the pop-up menu that appears. Click **Yes** (Windows) or **Delete** (Mac) to confirm deletion.
- Project items can be opened in their own window – this involves ‘undocking’ the item from Detail View. To **undock a project item**, ensure the item you want to undock is open, and from the **Home** tab of the ribbon, click the **Workspace** button followed by **Undock**. To redock a window, from the **Home** tab of the ribbon, click the **Workspace** button followed by **Dock**.



There is also a small button in the top-right corner of Detail View to undock a project item (look for two small windows).



Undocking is not currently available in NVivo for Mac.

NVivo Projects

Creating a new project

1. Choose **New Project** (Windows) or **Create New Project** (Mac) from the welcome screen.
2. Enter a name for your project in the 'Project title' field and a description in the 'Description' field (a description is optional).
3. To change the default save location, click the **Browse** button and select a new location followed by **Save**.
4. Click **Next**.
5. Select your required options for project saving and recovery (we recommend the defaults).
6. Click **Create Project**.
7. An 'NVivo Tour' may appear when the project opens – you can **Skip Tour** if this is not required.



NVivo projects are saved with an *.nvp (Windows) or *.nvpX (Mac) file extension and are saved by default in your Documents folder.

The project title is not the same as the project file name. Although the title is used when you first save a project, subsequent changes to the title are not reflected in the filename.



In the 'New Project' dialog, enter your filename into the 'Save As' box and then name your project in the 'Project Title' field. To change the save location, use the drop-down in the 'Where' field. Click **Create Project**. Note that the Mac version does not currently provide options for changing project saving and recovery at this stage (there is an option to 'Autosave project' however).

Opening existing projects

1. From the **File** menu select **Open**. Recent projects will appear in a list to the right (left-click to open any projects that appear here).
2. To select a different project click **Browse**.
3. Navigate to where your project is saved and select the project file you want to open.
4. Click **Open**.



Choose either **Open Project** or **Open Recent** from the **File** menu. If choosing 'Open Project', navigate to where the project is saved, before choosing **Open**.

Saving projects

To save a project, from the menu bar choose **File** → **Save** or use the shortcut key **Ctrl + S** (Windows) or **⌘ + S** (Mac).

Closing projects

To close an NVivo project, select **File** → **Close**. NVivo will prompt you to save any unsaved changes.

Backing-up projects

1. Ensure your project is open and from the menu bar select **File** → **Copy Project**.
2. In the dialog box that appears, click the second **Browse** button (the first Browse button will be greyed out if your project is open).
3. Select an appropriate location to save your project and enter a name in the 'File name' field.
4. Click the **Save** button followed by **OK**.



You can also back-up your projects by copying your NVivo project file (outside of NVivo) to another drive or location. Ensure your project is closed before doing this.



This function is not currently available on the Mac – to back-up, locate your *.nvpj project file using the Mac Finder and copy to the backup location.

Renaming projects

Open your project and select **File** → **Project Properties**. In the dialog box that appears, type the new name into the 'Title' field (you can also amend the project description) and then click **OK**. Note that this changes the title of the project, but not the filename. If you want to change the filename, you will need to do this outside of NVivo.

Data

Data is the collective term for your research material. There are two types of data in NVivo:

- **Files:** These include materials such as field notes, transcripts, interviews, literature or other data (e.g. audio or video). Files are imported or created inside your NVivo project and their content can be coded.
- **Externals:** These include materials that cannot be imported into NVivo e.g. hard copy newspaper articles, books, or PowerPoint presentations. You can use externals to represent this material and record any notes or summaries that can then be coded.

Files

Creating a new file (document, audio or video)

1. In Navigation View, click the **Files** folder or a sub-folder within this if required. You may need to expand the 'Data' folder if you can't see 'Files'.
2. Right-click in List View and choose **New File** followed by the type of file you want to create (i.e. Document, Audio or Video).
3. Provide a name and description (a description is optional).
4. Click **OK** (Windows) or **Done** (Mac). A new blank document (or audio or video file) will appear in Detail View.

Importing files

You can import a range of file types including **Word documents, PDFs, audio, video** and **images**.

1. In Navigation View, click the **Files** folder or a sub-folder within this if required. You may need to expand the 'Data' folder if you can't see 'Files'.
2. Right-click in List View and choose **Import Items**.
3. The 'Import Files' dialog box will open. Select the file(s) to import (hold down **Ctrl** (Windows)/ **⌘** (Mac) to select multiple non-consecutive files or hold down **Shift** and click at the top and bottom of a range to select consecutive files).
4. Click the **Open** button, then click **Import**.
5. If importing a single item, an 'Document Properties' dialog will open. Make any changes if required and click **OK** (Windows) or **Done** (Mac).



Right-click in List View followed by **Import** and then the type of file you wish to import (**Documents, PDFs** etc.). Select the files you wish to import, then click the **Import** button.

The default setting for imported Microsoft Word documents is 'read only', meaning that they cannot be edited. If you want to edit a document after it has been imported, tick the 'Edit' option at the top of the document (untick the box to return the document to 'read only' mode).



You can choose to embed media files in your NVivo project or store them externally to your project. By default, all media files under 20MB are embedded in your NVivo project (this can be adjusted). **Note:** If these files are stored externally to your project, you will need to ensure that these files are also moved if you move your NVivo project.

Importing surveys

While the steps below cover importing survey data from a Microsoft Excel file, survey data can also be imported via text or csv files as well as from SurveyMonkey and Qualtrics.

1. In Navigation View, click the **Files** folder or a sub-folder. You may need to expand the 'Data' folder if you can't see this.
2. Right-click in List View and choose **Import Survey** followed by **From Microsoft Excel File**.
3. Locate the Microsoft Excel file to import. Once selected, click the **Open** button which will take you to the **Survey Import Wizard**. Click **Next**.
4. **Step 2** is displayed. Select the number of rows used for your question headers and the order of your dates from the drop-down lists. If your Microsoft Excel file contains more than one worksheet the other worksheets will be displayed in separate tabs. Select which worksheet you want to import by clicking on the relevant tab (a preview of the content will be displayed). Click **Next**.
5. **Step 3** is displayed. This allows you to specify where cases are to be stored, which question contains the unique ID for survey respondents, and the case classification to be created. Make any changes required and click **Next**.
6. **Step 4** is displayed, which previews the first response in the survey in grid format. For each question displayed, specify the nature of the question (**Closed Ended** or **Open Ended**) and if it is to be imported. *Note: Closed ended values describe your respondents (classifying), and open ended values contain textual information to be analysed (codable).* Click **Next**.
7. If you don't wish NVivo to autocode themes and sentiment, untick the boxes for these options (we recommend this unless you specifically require these features).
8. Click **Finish**. A progress bar will appear showing the survey being processed. Once this has completed, click **Close**.
9. The imported dataset will be displayed in Detail View (if you selected to autocode themes and sentiment, the results of these will display also).



Surveys in NVivo for Mac are called 'Datasets' – only Excel files can be imported (i.e. SurveyMonkey and Qualtrics functionality is not currently available on the Mac). To import a survey, right-click in List View and choose **Import → Dataset**. Navigate to where your file is saved, select it and click **Open**. The import dataset assistant will walk you through the set-up – change any settings you require and then click **Import**.



Values in a dataset **cannot be edited once imported**. You should therefore ensure that your data is cleaned before your dataset is imported. **Note:** You can edit column names within NVivo.

Importing webpages

To import data from webpages, the NCapture web browser extension must be installed (this *should* be completed as part of the NVivo installation, but it is advisable to check that it has been installed). NCapture is compatible with Google Chrome.

To capture a webpage:

1. Open the webpage that you want to import and click the NCapture button at the top of your browser. 
2. Choose how to capture the information (either the full webpage or just the main article) by selecting **Web Page as PDF** or **Article as PDF**. Enter a name and create a description or memo by selecting the appropriate tab and typing in the field.
3. If required, enter one or more codes in the **Code at codes** box.
4. Click **Capture**.
5. The content is saved as an NCapture file that can be imported into your NVivo project (see next steps).

To import a captured webpage:

1. In Navigation View, click the **Files** folder or a sub-folder. You may need to expand the 'Data' folder if you can't see this.
2. From the ribbon, choose the **Import** tab followed by **NCapture**.
3. Select the webpage(s) to be imported, along with one of the following options from the 'NCapture' dialog box:
 - *All captures not previously imported*: Selects all webpages in the current location that have not been previously imported into your project.
 - *All captures*: Selects all webpages in the current location.
 - *Selected captures*: Allows you to choose which webpages you want to import.
4. Click **Import**.



You can also import content from social media (Facebook, Twitter and YouTube). Facebook and Twitter can be captured as either a webpage (e.g. Tweets or Facebook news feeds as a PDF) or as a dataset (e.g. Facebook posts and comments). YouTube data can be captured either as video only, video and comments or webpage as a PDF.

Externals

1. In Navigation View, click the **Externals** folder or a sub-folder if required. You may need to expand the 'Data' folder if you can't see this.
2. Right-click in the List View area and choose **New External**.
3. Name and describe your external (a description is optional).
4. In the 'External' area (Windows users will need to click the tab for this in the top-left corner) use the 'Type' drop-down list, to select the option that describes your external i.e. **File link**, **Web link** or **Other**.
5. To create an external with preformatted headings, choose the required options for 'Contents', 'Unit', and 'Start/End range'.
6. Click **OK** (Windows) or **Done** (Mac). Your new external will appear in Detail View.

Organising Project Items

Folders

Creating folders

1. In Navigation View, right-click on the folder you want to make a sub-folder under e.g. 'Files' or 'Queries'.
2. From the pop-up menu that appears, choose **New Folder**.
3. In the dialog box that appears, name your folder and enter a description (a description is optional).
4. Click **OK** (Windows) or **Done** (Mac).

Moving folders

1. In Navigation View, right-click on the folder you want to move and choose **Cut**.
2. Select the new destination for the folder, right-click and choose **Paste**.



A quick way to move a folder is to drag and drop it to the new location. Alternatively, you can use Ctrl + X and Ctrl + V to move your folder to a new location (Windows).



There is no 'Cut' option on the Mac. Instead, either drag and drop your folder to the new location, or alternatively choose **Copy** then hold down the **Option** key while right-clicking on the new location. An option will appear on the sub-menu to **Move Into** – choose this to 'paste' the folder.

Deleting folders

1. In Navigation View, right-click the folder you want to delete.
2. From pop-up menu that appears, choose **Delete**.
3. Click **Yes** (Windows) or **OK** (Mac) to confirm the deletion.



When you delete a folder you also delete any items stored within it, so be careful!

Static Sets

Creating sets

1. In Navigation View select the 'Static Sets' folder (this is located underneath 'Sets').
2. Right-click in List View and select **New Static Set**.
3. Insert a name and description for the new set (a description is optional).
4. Click **OK** (Windows) or **Done** (Mac).
5. To add items to a set, select the set in Navigation View.
6. Right-click in List View and select **Add Static Set Members**.
7. Select the check box next to the items to be added to the set (you may need to expand some folders to view all items).
8. Click **OK** (Windows) or **Select** (Mac).



You might find it useful to create a set for items 'To be coded' or 'Codes for review'.

Dynamic Sets

Creating dynamic sets

1. In Navigation View select 'Dynamic Sets' (this is located underneath 'Sets').
2. Right-click in List View and select **New Dynamic Set**.
3. In the dialog box that appears, insert a name and description for the new dynamic set (a description is optional).
4. Click the 'Search Criteria' tab to set the required criteria (the 'Advanced' tab has some useful options).
5. Click **OK**.
6. Your dynamic set will appear in Navigation View.



Dynamic sets are not currently available in NVivo for Mac.

Codes and Coding

NVivo has three types of codes:

- **Codes:** Codes act as containers for your themes, concepts, topics and ideas. You can organise codes in hierarchies – moving from general topics at the top (parent codes) to more specific topics (child codes).
- **Relationships:** Relationships are codes that define the connection between two project items. For example, the relationship between two codes (e.g. poverty impacting health). This training manual does not cover relationships or relationship types – consult the help files for details.
- **Sentiment:** Sentiment codes display the results of sentiment coding. They behave a little differently to the other codes in NVivo – you cannot create, rename, move or merge sentiment codes and they are also aggregated by default. Note that sentiment coding is only available in NVivo installations which have *coding enhancements* enabled.



Relationship and sentiment codes are not currently available in NVivo for Mac.

Creating codes

1. In Navigation View, in the **Coding** area click the **Codes** folder (or the specific folder you want to create a code within).
2. Right-click in List View and choose **New Code** (Windows) or **New Top-Level Code** (Mac). A dialog box will appear.
3. Name and describe your code (a description is optional, but highly recommended).
4. Click **OK** (Windows) or **Done** (Mac). Your new code will appear in List View.



Code descriptions are an important aspect of coding – they ensure you code in a consistent manner and are helpful for recalling what each code represents. They are particularly invaluable when working in a team.

To create a new 'child' code:

1. In List View, select the 'parent' code then right-click and select **New Code**.
2. Name and describe your code (a description is optional).
3. Click **OK** (Windows) or **Done** (Mac). Your new code will appear in List View underneath the 'parent' code.

Coding

These training notes only cover some of the possible techniques for coding in NVivo. Consult the help files for full details of other techniques.

Coding with the NVivo ribbon

1. Open a file or code in Detail View.
2. Select the required content.
3. On the **Document** tab of the ribbon, select **Code** followed by **Code Selection**.
4. The 'Select Code Items' dialog box appears.
5. Select the code(s) you want to code at (use **Ctrl** to choose multiple codes) or add a new code in the top-right corner of the dialog.
6. Click the blue **Code Selection** button at the bottom of the dialog to return to your file/code.



After selecting the text you wish to code, select the **Home** tab of the ribbon and choose to **Code Selection** either at **To Existing Codes or Cases**, **To New Code** or **To New Case**. If coding at a new node or case, enter the name and description, then click **Done**. If coding at an existing code(s), in the dialog that opens, tick the nodes you wish to code at then click **Select**.

Coding with the quick code button (Mac Only)

1. Open a file or code in Detail View.
2. Select the required content.
3. At the top of Detail View, click the **Code** button (this will have a light bulb icon to the left of it).
4. Either select an existing code on the left-hand side of the window that opens (you can search for the code name if needed), or choose to code at a new code on the right-hand side. If you're coding to a new code, you will be prompted to name and describe the code – click **Done** when finished.

Drag and drop coding

1. Open the item you want to code and display your codes in List View.
2. Select the required content, then drag and drop the selected content to the code.



Drag and drop to the white space in List View to create a new code (Windows only).

If you prefer to drag and drop from left to right, turn on the Code Panel (there is a tick box for this at the top of the Detail View). Text can be dragged and dropped to the Code Panel.

Right-click coding (Windows)

1. Open a file or code in Detail View and select the required content.
2. Right-click and choose **Code Selection**.
3. The 'Select Code Items' dialog appears.
4. Select the code(s) you want to code at (use **Ctrl** to choose multiple codes) or add a new code in the top-right corner of the dialog.
5. Click the blue **Code Selection** button at the bottom of the dialog to return to your file/code.

Right-click coding (Mac)

1. Open a file or code in Detail View and select the required content.
2. Right-click and choose **Code Selection** – choose either **To Existing Codes or Cases**, **To New Code** or **To New Case** as required.
3. *If coding at existing code(s)*, in the dialog box that appears, tick the codes you require and then click **Select**.
4. *If coding at a new code or case*, you will be prompted to name and describe the code/case– click **Done** when finished.

Autocoding by paragraph style

To code selected files by **paragraph style** (e.g. by question):

1. In List View select the files that you want to autocode. Right-click and choose **Autocode**. The Autocode Wizard appears.
2. Choose the 'Use the style or structure' option. Click **Next**.
3. In Step 2 of the wizard, ensure 'paragraph styles' is selected. NVivo scans the document(s) looking for paragraph styles – these will display in the 'Available paragraph styles' box on the left (you may need to click on **Next** to see these). Select the level of heading you want to autocode on and add this to the right-hand side by clicking on the right pointing arrow.
4. Click **Next**. Choose whether to code at an 'Existing Code or Case' or 'New Code or Case'. If choosing the latter, enter a name for this new code. Note that there are also options for 'Existing Folder' or 'New Folder'.
5. Click **Finish**.



Autocoding by paragraph style is not currently available in NVivo for Mac. Datasets and speaker names can both be autocoded however.

Working with coding and codes

Uncoding from a code

1. Open the code that you want to remove coding from.
2. Select the text that you want to uncode.
3. Right-click on the text and choose **Uncode from This Code** (Windows) or **Uncode Selection → From This Code** (Mac).



It is also possible to uncode from files.

Moving codes

1. In List View, select the code you want to move (hold down **Ctrl** (Windows)/ **⌘** (Mac) to select multiple non-consecutive codes or hold down **Shift** and click at the top and bottom of a sequence of codes to select consecutive codes).
2. Right-click on top of the selected code(s) and choose **Cut**.
3. Select the position that you want to move it to (e.g. by selecting a parent level code).
4. Right-click and choose **Paste**. Your code(s) will appear in the new location.



There is no **Cut** option on the Mac. Instead, right-click on the selected code(s) and choose **Copy**, then right-click on the new location while holding down the **Option** key. An option will appear on the sub-menu to **Move Here** – choose this to 'paste' the code.

Merging codes

1. In List View, select the required code.
2. Right-click and choose **Copy** or **Cut** as required.
3. Right-click the target code and choose **Merge into Selected Code**.
4. In the dialog box that appears, choose the required merge options and click **OK**.



There is no **Cut** option on the Mac. Instead, right-click on the selected code and choose **Copy**, then right-click on the new location while holding down the **Option** key. An option will appear on the menu to **Merge Into Selected Code Removing Original** – choose this to merge followed by **Merge & Remove Existing**.

Renaming codes

1. In List View, select the code that you want to rename.

2. Right-click and select **Code Properties** (Windows) or **Get Info** (Mac) from the pop-up menu.
3. In the 'Code Properties' dialog box, type in the new code name (amend the description if required).
4. Click **OK** (Windows) or **Done** (Mac). Your renamed code will appear in List View.

Deleting codes

1. In List View, select the code that you want to delete.
2. Right-click and choose **Delete** from the pop-up menu.
3. Click **Yes** (Windows) or **Delete** (Mac) to confirm the deletion.

Coding Tips and Tricks

Shortcut keys (Windows)

Key combination	Action
Ctrl + F2	Code selection at new or existing codes
Ctrl + F9	Code selection at code currently visible in the quick coding bar
Ctrl + Shift + F2	Uncode selection at existing codes
Ctrl + Shift + F3	Uncode selection at this (i.e. open) code
Ctrl + F8	Code "In Vivo"
Ctrl + Q	Move from selected codable content in Detail View to the Quick Coding bar
Ctrl + Shift + P	Opens the 'Code Properties' dialog for you to enter a description or edit the code name (select the code first)

Shortcut keys (Mac)

Key combination	Action
Option + ⌘ + 2	Code selection at existing codes
Option + ⌘ + 3	Code selection at new code
⌘ + Shift + 2	Uncode selection at existing codes
⌘ + Shift + 3	Uncode selection at this (i.e. open) code
Option + ⌘ + 9	Code "In Vivo"
⌘ + Option + I	Opens the 'Get Info' dialog to enter a description or edit the code name (note: select the code first)

File/Code colours

1. Right-click on the file(s) or code(s) of your choice.
2. Select **Color** followed by the colour you want to assign.
3. Your chosen colour will appear on the right in List View.



In NVivo for Windows, if you are unable to see the colour you've applied, you may need to customise List View. From the **Home** tab of the ribbon, click **Workspace** followed by **Customize**. From the dialog box, move 'Color' from the left to the right and click **OK**.

Aggregate coding

To aggregate all coding from child codes to a parent code:

1. In List View, select the parent level code that you want to aggregate coding for.
2. Right-click and select the **Aggregate Coding from Children** (Windows) or **Aggregate Coding from Child Codes** (Mac) from the bottom of the drop-down list.
3. Repeat step 2 above if you want to turn off aggregation.

Coding stripes

1. Open a file or code in Detail View.
2. At the top of the Detail View, there is an option for **Coding Stripes** – select this followed by the option you require. Note that Windows users can also select **Coding Stripes** from the ribbon.



To turn coding stripes off, choose the **Coding Stripes** button again, followed by 'None'.

Coding on from a code

1. Create child codes from the code you want to code on from – see the 'Creating codes' section (page 11) for details.
2. Open the code that contains the data that needs to be recoded.
3. Code from this code to the new child codes - see the 'Coding' section (page 12) for different techniques).



Coding will remain at the top-level as well as the child-level that it has been recoded to. To remove it from the parent level code, uncoding is required (see page 14).

Viewing context

To view text surrounding coded data, with the code open in Detail View, right-click on the text and choose one of the following options:

- **Spread Coding:** Spreads the coding permanently within the code itself.
- **Open Referenced File:** Opens the original file the text was coded from and highlights it in context.
- **Coding Context:** Temporarily spreads the content within the code itself. Note that once the code has been closed, this context will no longer appear.

Coding frameworks

Adding descriptions for codes

1. Right-click the code you want to enter a description for and choose **Code Properties** (Windows) or **Get Info** (Mac).
2. Enter the description.
3. Click **OK** (Windows) or **Done** (Mac).

Customising a code list (displaying descriptions)

1. Select the **Codes** folder in Navigation View (you may need to expand the 'Coding' folder if you cannot see this).
2. Click in the white space in List View (or select a code).
3. From the **Home** tab of the ribbon, click **Workspace** followed by **Customize**.
4. Choose the fields that you require from the 'Available columns' on the left (use the **Ctrl** key to select more than one).
5. Click on the arrow in the centre of the dialog box to move items over to 'Selected columns'. Move any unwanted columns to the left by selecting the left arrow.
6. Re-order the list by selecting the vertical arrows on the right.
7. Click **OK** to view your customisations in List View.



This feature is not currently available in NVivo for Mac.

Exporting a codebook

1. From the **Share** tab of the ribbon, choose **Export** followed by **Export Codebook**.
2. From the dialog box that appears, use the **Browse** button to choose a save location for your codebook, and select the codes folder(s) you require.
3. If you want to include the number of files and references for each code, select the checkbox for this in the bottom-left.
4. Click **OK**. Your codebook will open in Microsoft Word.



In Step 2 above, you will first be asked to select the code(s) you require – then click **Select**. You will then be prompted to choose a save location. There is no option on the Mac to include the number of files and references (Step 3 above).

Changing code order in List View

To move codes within the same level of a code hierarchy:

1. View your codes in List View (you need to close anything open in Detail View).
2. Select the code you want to move.
3. From the **Home** tab of the ribbon, click **Workspace** followed by **Sort By** then **Custom**.
4. Click the **Sort By** button again and choose the **Move Up** or **Move Down** buttons as required to change the sort order.
5. If your codes get moved out of place, the **Sort By** → **Custom** option will return them to the locations you set.



This feature is not currently available in NVivo for Mac.



A simpler way to keep your codes in a particular order is to prefix them with numbers and then sort alphabetically.

Classifications and Cases

File classifications

Creating a file classification

1. In Navigation View, select the **File Classifications** folder (you may need to expand the 'Data' folder if you can't see this).
1. In List View, right-click and select **New Classification**.
2. The 'New Classification' dialog box will open. Enter in a name and description for your classification (a description is optional).
3. Click **OK** (Windows) or **Done** (Mac). Your classification will now be added to your project.

Assigning file classifications

Once a file classification has been created, the next step is to assign it to the files required:

1. Select the file(s) you want to apply a classification to and right-click on the item(s).
2. Select **Classification** followed by the classification of your choice. Your classification will now be assigned to these item(s).

Creating file attributes

To create files attributes:

1. In Navigation View select the **File Classifications** folder (you may need to expand the 'Data' folder if you can't see this).
2. In List View find the classification you want to add attribute(s) to, right-click on the classification and choose **New Attribute**.
3. The 'New Attribute' dialog box will open. Enter a name and description for the attribute (a description is optional).
4. In the 'Type' list, select the data type for the attribute values.
5. Click the 'Values' tab to add attribute values. Click **Add** and enter the attribute value. Repeat for each attribute value (if required).
6. Click **OK** (Windows) and **Done** (Mac).



In Step 5 above there isn't a tab for 'Values' – instead this can be seen in the bottom half of the dialog box. Click the + symbol to add values, repeating as many times as is required.

Assigning file attribute values

There are several ways to assign file attribute values. The easiest method is to open the classification sheet and assign the values using the drop-down menus from each cell:

1. To open a classification sheet double-click the file classification in the List View. The classification sheet will open in Detail View.
2. To assign attribute values to each file, hover your mouse over the corresponding cell and a drop-down menu will appear. Click the drop-down menu and select the attribute value you require.



In Step 2 above, you will first need to click the option for **Classification Sheet** (in the top-left of Detail view). Click the magnifying glass icon in each cell to see the drop-down menu of attributes – click the attribute you require for each file.



A quicker way to achieve this is to import the data from a Microsoft Excel spreadsheet – details for how to do this are outlined in the 'Assigning case attribute values' section that follows.

Creating cases

In order to set-up case classifications you will first need to set-up cases (these represent the units of analysis for your research e.g. people, places, organisations).

Method A: One file per person

This method is only appropriate if all the data for each case in your project is stored in a single file (and you have no other data relating to your cases).

1. In List View, select the file(s) you want to create case(s) from – use the **Shift** key to select consecutive items or **Ctrl** (Windows)/ **⌘** (Mac) to select non-consecutive items.
2. Right-click on the selected files.
3. From the menu that appears, choose **Create As** → **Create As Cases** (Windows) or **Create As** → **Cases** (Mac).
4. To create cases at the 'root' level, ensure that the 'Cases' folder is selected. Otherwise, select the location where you want your cases to be created.
5. Click **OK**.



Cases can also be created at the time of import – in the 'Import Files' dialog, tick the box for 'Create a case for each imported file' (Windows only).



Skip Step 4 & 5 above – cases will automatically be created at the 'root' level of the cases folder.

Method B: Many files per person

To create a case from multiple files:

1. In List View, select the files you want to create cases from – use the **Shift** key to select consecutive items or **Ctrl** (Windows)/ **⌘** (Mac) to select non-consecutive items.
2. Right-click on the selected files.
3. From the menu that appears, choose **Create As** → **Create As Code** (Windows) or **Code Files** → **To New Case** (Mac).
4. To create a case at the 'root' level, ensure that the 'Cases' folder is selected (not required for the Mac). Otherwise, select the location where you want your case to be created.
5. A dialog box will appear, asking you to name the case and optionally add a description – enter this now.
6. Click **OK** (Windows) or **Done** (Mac).

Method C: Many people per file

In situations where you have focus group data or multiple speakers within a single interview, coding at cases will not be as straightforward, as each document will contain text relating to multiple people. In these situations, use the autocoding feature to extract the text for each participant. If you have used paragraph styles in your transcripts, refer to the earlier steps for autocoding on page 13). Otherwise, you can autocode by speaker name using the steps below – ensure that each speaker name is entered consistently on a separate line to the response.

To autocode on speaker name:

1. In List View select the files that you want to autocode. Right-click and choose **Autocode**. The Autocode Wizard appears.
2. Choose the 'Speaker name' option. Click **Next**.
3. Enter the speaker names one at a time followed by the **Enter** key (these are the speakers in the files that you selected in Step 1). If NVivo recognises the name in the file, a green tick will appear next to the name. Continue until all speaker names have been entered. Click **Next**.
4. Specify the classification that you wish the cases to be assigned to (or create a new classification of required), and if needed click the **Change** button to change where the cases will be saved. Click **Finish**.



Only one file can be autocoded at a time. Right-click on the file and choose **Autocode** → **By Speaker**. Enter the speaker name one at a time, followed by the **Enter** key. Specify where you wish the cases to be created, and how they should be classified. Click the **Autocode** button.

Case classifications

Creating a case classification

1. In Navigation View select the **Case Classifications** folder (you may need to expand the top-level 'Cases' folder if you can't see this).
2. In List View right-click and select **New Classification**.
3. The 'New Classification' dialog box opens. 'Create a new classification' will be selected by default – enter in a name and description (a description is optional).
4. Click **OK** (Windows) or **Done** (Mac). Your case classification will now be added to your project.

Assigning case classifications

Once a case classification has been created, the next step is to assign it to the cases required:

1. Select the case(s) you want to apply a classification to and right-click.
2. Select **Classification** followed by the classification of your choice. Your classification will now be assigned to these cases(s).

Creating attributes

1. In Navigation View select the **Case Classifications** folder (you may need to expand the 'Cases' folder if you can't see this).
2. In List View find the classification you want to add attribute(s) to, right-click on the classification and choose **New Attribute**.
3. The 'New Attribute' dialog box will open. Enter a name and description for the attribute (a description is optional).
4. In the 'Type' list, select the data type for the attribute values.
5. Click the 'Values' tab to add attribute values. Click **Add** and enter the attribute value. Repeat for each attribute value (if required).
6. Click **OK** (Windows) and **Done** (Mac).



In Step 5 above there isn't a tab for 'Values' – instead this can be seen in the bottom half of the dialog box. Click the + symbol to add values, repeating as many times as is required.

Assigning case attribute values

Case attributes can be assigned in the same manner described previously for file classifications. However, a faster way to assign them is to prepare a Microsoft Excel spreadsheet containing the required data and importing this as a classification sheet. See the example classification sheet below:

	A	B	C	D	E	F
1	Person	Age Group	Community	Gender	Generations Down East	Township
2	Susan	40-49	Harkers Island	Female	3 or more	Harkers Island
3	Dorothy	30-39	Williston	Female	3 or more	Smyrna
4	Richard	30-39	Cedar Island	Male	3 or more	Cedar Island
5	William	60-69	Otway	Male	1	Straits
6	Maria	40-49	Davis	Female	1	Davis
7	Thomas	50-59	Harkers Island	Male	1	Harkers Island
8	Patricia	50-59	Cedar Island	Female	3 or more	Cedar Island
9	Margaret	30-39	Davis	Female	3 or more	Davis
10	Daniel	60-69	Davis	Male	2	Davis
11	Charles	40-49	Atlantic	Male	1	Atlantic
12	Mary	70 - 79	Marshallberg	Female	3 or more	Marshallberg
13	James	70 - 79	Marshallberg	Male	2	Marshallberg
14	Barbara	40 - 49	Bettie	Female	2	Straits
15	Robert	60 - 69	Harkers Island	Male	1	Harkers Island



The Excel file will need to be saved as a tab-delimited text or CSV file before importing.

To import a classification sheet:

1. Ensure the file you wish to import is closed.
2. In List View select the required classification, then right-click and choose **Import Classification Sheet** (Windows) or **Import Classification Sheet** (Mac).
3. The **Import Classification Sheets Wizard** opens.
4. Select the file you wish to import and then follow the instructions in the wizard to import the classification sheet (full details can be found in the help files if required).
5. When you have completed all steps click **Finish** (Windows) or **Import** (Mac).

Introduction to Queries

Queries are ways of asking questions of your data/coding. This training resource covers the following query types (coding comparison and group queries can be found in the help files – note that group and compound queries are not available on the Mac):

- **Text search:** Finds all instances of words, phrases or synonyms throughout your data.
- **Word frequency:** Finds the most frequently occurring words in your data.
- **Coding queries:** Asks questions of your coding and/or your coding and attributes.
- **Matrix coding and crosstab queries:** Allows you to quickly make group comparisons and ask questions about multiple codes/cases or attributes in your project.
- **Compound query:** Allow you to combine queries e.g. combine a text and a coding query, two text queries, or two coding queries.

Word frequency queries

1. On the **Explore** tab of the ribbon, select the **Word Frequency** button.
2. From the 'Display words' panel, select 'All' to display a count for all words in the selected items. Alternatively, enter a limit for the words displayed – for example, you could display the 100 most frequently occurring words.
3. Enter the 'Minimum word length' that you require (e.g. 4 characters) into the 'With minimum length' box.
4. Select the scope of your search by using the buttons for 'Files & Externals', 'Selected Items' or 'Selected Folders'.
5. We don't recommend changing the 'Grouping' slider (Windows) or 'Finding matches' options (Mac), but you are welcome to explore this if you wish.
6. To run the query, click the **Run Query** button in the top-right corner. By default, NVivo will display the 'Summary' view – note that there are also options for a **Word Cloud**, **Tree Map** or **Cluster Analysis** (Windows) or a **Word Cloud** (Mac).



When you run a word frequency query, a preview code is created for each word – this enables you to see all references to the word. To open the preview for a word, double-click the word from the list that appears in Detail View. It is also possible to save any of the words (with content) as a code. To save a word and its content, right-click on the word from the list in Detail View and choose **Create As Code**.



Create As Code is not available from a right-click on the Mac. Instead, right-click and choose **Run Query** then use the **Save Results** button in the top-right corner to save as a new code.

Stop words

Stop words are excluded from text searches and word frequency queries (e.g. and, it, the). To amend NVivo's built-in stop words list:

1. Choose **File** → **Project Properties**.
2. From the 'General' tab click the **Stop Words** button.
3. Add (or remove) any stop words of your choosing. Click **OK**.
4. Click **OK** to close the 'Project Properties' dialog.



Stop words can also be added from the Word Frequency preview. Right-click on a word and choose **Add to Stop Words List**.

Text search queries

1. On the **Explore** tab of the ribbon, select the **Text Search** button.
2. Enter the specifications for your query (i.e. the word or phrase you want to find) in the 'Search for' area.
3. Select the scope of your search by using the buttons for 'Files & Externals', 'Selected Items' or 'Selected Folders'.
4. We don't recommend changing the 'Find' slider (Windows) or 'Finding matches' options (Mac), but you are welcome to explore this if you wish. The 'Special' button has some useful options you might like to explore.
5. To run the query, click the **Run Query** button in the top-right corner.



Once you have run your query, a series of shortcuts will appear in Detail View. If you double-click on a shortcut, NVivo will open the file and highlight the search word in the context it occurs. Alternatively, you can use the tabs down the side of Detail View to see the summarised results (these tabs are in the top-left on the Mac). One of these tabs – Word Tree – displays the results of your search in a visual format.



Once you have run your query, if you would like to save the results as a new code (or merge into an existing code), click the **Save Results** button in the top right of the Detail View.

Text search operators

Character	Name	Use
+	Plus	Indicate words or phrases that must be included
-	Hyphen	Can be used in place of NOT
&	Ampersand	Can be used in place of AND
	Pipe	Can be used in place of OR
!	Exclamation mark	Can be used in place of NOT
()	Round brackets	Groups clauses to form sub queries
" "	Double quotes	Enclose a group of words to enable search for a phrase
~	Tilde	Indicate proximity
*	Asterisk	Multiple character wildcard to include any number of characters
?	Question mark	Single character wild card to include only one character

Coding queries

1. On the **Explore** tab of the ribbon, click the **Queries** button followed by **Coding**.
2. Define your search criteria:
 - a. To find content coded at one or more codes, select **All Selected Codes or Cases** (Windows) or **All of these Codes** (Mac).
 - b. To find content coded at any of the codes you specify, select **Any Selected Code or Case** (Windows) or **Any of These Codes** (Mac).
 - c. To find content coded at codes with a specified attribute value, select **Any Case Where**.
3. Click the  button (Windows) or  (Mac) to select the items you want to include in the query then click **OK** (Windows) or **Select** (Mac).
4. Add any additional search criteria you require.
5. Choose where you want to search for coding: 'Files & Externals', 'Selected Items' or 'Selected Folders'.
6. Click **Run Query**.

Matrix coding queries

1. On the **Explore** tab of the ribbon, select the **Matrix Coding** button.
2. Add the items you require into the 'Rows' and 'Columns' panels, either by dragging and dropping or clicking on the '+' symbol.
3. Choose where you want to search for coding: 'Files & Externals', 'Selected Items' or 'Selected Folders'.
4. To run the query, click the **Run Query** button.

From the results that appear:

- Double-clicking on any number greater than zero allows you to see what a sub-group in your sample said about a particular code.
- By default, NVivo will display numbers that represent coding references. This can be changed on the 'Matrix' tab of the ribbon (Windows only).
- Another useful strategy for viewing matrix coding results is to transpose the table to view the patterns differently. To do so, use the **Transpose** button on the 'Matrix' tab of the ribbon (Windows only).



If you want to save a matrix or coding query (i.e. the question, not the results of the query), click the **Save Criteria** button and enter a name and description.

Crosstab queries

Codes versus cases

1. On the **Explore** tab of the ribbon, select the **Queries** button followed by **Crosstab**.
2. Select **Cases** from 'Crosstab codes against' (Windows) or 'Show code against' (Mac).
3. Add the codes you are interested in to the 'Codes' panel by dragging and dropping them (or clicking the plus sign).
4. Add the cases of interest to the 'Cases' panel by dragging and dropping them (or clicking the plus sign).
5. Select the scope of your search by choosing from 'Files & Externals', 'Selected Items' or 'Selected Folders'.
6. Click **Run Query**. If you wish to save the results of the crosstab, use the **Save Results** button. If you wish to save the query itself, click **Save Criteria**.

Codes versus cases

1. On the **Explore** tab of the ribbon, select the **Queries** button followed by **Crosstab**.
2. Select **Attributes** from 'Crosstab codes against' (Windows) or 'Show code against' (Mac).
3. Add the codes you are interested in to the 'Codes' panel by dragging and dropping them (or clicking the plus sign).
4. Select the classification of interest, then choose either one or two attributes as required.
5. Select the scope of your search by choosing from 'Files & Externals', 'Selected Items' or 'Selected Folders'.
6. Click **Run Query**. If you wish to save the results of the crosstab, use the **Save Results** button. If you wish to save the query itself, click **Save Criteria**.

Compound queries (Windows only)

1. On the **Explore** tab of the ribbon, select the **Queries** button followed by **Compound**.
2. Under 'Search for content matching' select options from the following lists:
 - a. For 'Subquery 1' select the first query type and then specify the criteria required.
 - b. For the 'NEAR Content' option select a coding search operator such as AND. If you chose the NEAR or PRECEDING Content, you can specify the options for proximity and retrieval.
 - c. For 'Subquery 2' select the second query type and then specify the criteria required.
3. If required, from the 'In' list, select the items you want to include in the query e.g. selected items or folders.
4. If required, from the 'Where' list, specify to only search project items created and/or modified by any or selected users.
5. Click **Run**.



Compound queries are not currently available in NVivo for Mac.

Reporting

NVivo provides several predefined reports that contain summary information about your project – these are located in the **Reports** folder in the Navigation View.



Reports are not currently available in NVivo for Mac.

Creating formatted reports

1. In Navigation View select the **Formatted Reports** folder (you may need to expand the top-level 'Reports' folder if you can't see this).
2. In List View, double-click the report you want to run. The 'Filter Options' dialog box opens.
3. Select any filters you want to apply to the data.
4. Click **OK**.

Creating text reports

1. In Navigation View select the **Text Reports** folder (you may need to expand the top-level 'Reports' folder if you can't see this).
2. In List View, double-click the text report you want to run. The 'Filter Options' dialog box opens.
3. Select any filters you want to apply to the data.
4. Click **OK**. The 'Save As' dialog box opens.
5. Choose a different location if necessary.
6. In the 'File name' box, review the name that NVivo proposes for the report, and change if necessary.
7. In the 'Save as type' box, choose the file format for the report.
8. Click **Save**.

Visualizations

Mind maps

To create a mind map:

1. On the **Explore** tab of the ribbon, select **Maps** button followed by **Mind Map**.
2. Enter a name and description for the mind map (a description is optional). Click **OK** (Windows) or **Done** (Mac). The mind map will display in Detail View.
3. Type a label for the main idea and then press **Enter**.
4. Select the main idea, then on the **Mind Map** tab of the ribbon select any of the following (as required):
 - a. To add an idea at the same level, click **Sibling Idea** or press **Enter**.
 - b. To add a subordinate idea, click **Child Idea** or press **Insert**.
 - c. To add an idea that is not connected to any other idea on the map, click **Floating Idea**.
5. Type a name for the new idea and then press **Enter**.
6. Continue adding ideas as required.



Options for **Child**, **Sibling** and **Floating Idea** appear at the top of the Detail View.

To create codes from a mind map:

1. Open the mind map you want to create codes from.
2. On the **Mind Map** tab, click **Create As Codes or Cases**.
3. Select the location where you want your codes created. Click **OK**.



The option for **Create as Codes** appears at the top of Detail View. Specify the location where you want your codes to be created and then click **OK**.

Shortcut keys (Windows)

Key combination	Action
In mind maps, add a sibling idea to the selected idea	ENTER
In mind maps, add a child idea to the selected idea	INSERT
Edit the label of a shape or idea	F2
Save a text edit	ENTER
Delete the selected shape, item or connector	DELETE

Shortcut keys (Mac)

Key combination	Action
In mind maps, add a sibling idea to the selected idea	Option + S
In mind maps, add a child idea to the selected idea	Option + C
In mind maps, add a floating idea	Option + F
Edit the label of a shape or idea	ENTER
Save a text edit	ENTER
Delete the selected shape, item or connector	DELETE

Project maps

To create a project map:

1. On the **Explore** tab of the ribbon, select **Maps** button followed by **Project Map**.
2. Enter a name for the project map and a description (a description is optional).
3. Click **OK**. The project map will display in Detail View.
4. On the **Project Map** tab, click **Add Project Items**.
5. In the dialog box that appears, click the folder name that contains the items you want to add (this will be on the left-hand side).
6. On the right-hand side, select the check boxes for the items you want to add to the map.
7. Click **OK**. Your selected items will be added to the project map.
8. If required, select a layout option from the 'Layout' button on the **Project Map** tab of the ribbon.



Project Maps can be displayed in four different ways: Layered Directed Graph, Hierarchical, Circular, and Directed.

To add associated items to a project map:

1. Select an item on the project map and on the **Project Map** tab click **Show Associated Items**.

2. From the **Add Associated Items** pane, drag and drop the required items across to the map.



Project maps are not currently available in NVivo for Mac.

Concept maps

To create a concept map:

1. On the **Explore** tab of the ribbon, select **Maps** button followed by **Concept Map**.
2. Enter a name for the concept map and a description (a description is optional).
3. Click **OK** (Windows) or **Done** (Mac). The concept map will display in Detail View.
4. Add shapes to the concept map by double-clicking these from the shapes pane that appears (or dragging and dropping them into the map).
5. To connect shapes, from the **Concept Map** tab click **Connector**. Click inside Detail View and drag the connecting line between any two shapes. The arrow will connect the shapes in the direction that you drag.
6. To add a label, double-click inside a shape and enter the text in the box that appears.

To add project items to a concept map:

1. On the **Concept Map** tab click **Add Project Items**.
2. In the dialog box that appears, click the folder name that contains the items you want to add (this will be on the left-hand side).
3. On the right-hand side, select the check boxes for the items you want to add to the map.
4. Click **OK** (Windows) or **Select** (Mac).



The options for **Shape**, **Connector** and **Project Item** appear in the top-left corner of Detail View.

Charts

To create a chart via the chart wizard:

1. On the **Explore** tab click the **Chart** option, followed by **Charts**.
2. Select create a chart for coding, files or cases and click **Next**.
3. Follow the steps in the Wizard and click **Finish**.



Alternatively, you can right-click a file, code, or case in the List View and choose **Visualize** followed by the type of chart you want to create.



There is no Chart Wizard in the Mac version. Instead, select an item you wish to chart and on the **Explore** tab of the ribbon click the **Chart** button.

Hierarchy charts

To create a hierarchy chart via the hierarchy chart wizard:

1. On the **Explore** tab of the ribbon click the **Hierarchy Chart** option, followed by **Hierarchy Charts**.
2. Select whether to visualize coding, sentiment or attribute values and click **Next**.
3. Select the items you want to visualize and click **Finish**.



From the **Explore** tab of the ribbon click **Hierarchy Chart**. A hierarchy chart will appear in Detail View. From here, select whether you wish to visualise codes, files or attribute values (note that the 'sentiment' option is only available in NVivo for Windows).



There are two types of hierarchy charts in NVivo – Tree Maps and Sunbursts. The default hierarchy chart is a tree map. You can change the display of a hierarchy chart from the **Hierarchy Chart** tab (Windows) or choose the 'Sunburst' option in the top-left corner of Detail View (Mac).

Comparison diagrams

1. On the **Explore** tab, click the **Diagrams** button then the type of **Comparison Diagram** you require i.e. **Compare Files**, **Compare Codes** or **Compare Cases**.
2. From the 'Select Project Items' dialog box, select the two items you want to compare. Click **OK** (Windows) or **Select** (Mac). The diagram will display in Detail View.

Explore diagrams

1. In List View select the file, code or case you want to explore.
2. On the **Explore** tab, click the **Diagrams** button then **Explore Diagram**. The diagram will display in Detail View.
3. To change the focus of the diagram, select any of the items (file, code or case) displaying in Detail View and click **Change Focus** – this is located on the **Explore Diagram** tab of the ribbon (Windows) or in the top-left corner of Detail View (Mac).
4. A new explore diagram will now display in Detail View. You can use the **Back** and **Forward** buttons to move through your focus history.

Cluster analysis

1. On the **Explore** tab click the **Diagrams** button, followed by **Cluster Analysis**.
2. Choose whether you want to perform a cluster analysis diagram for **Files, Externals & Memos** or **Codes**. Click **Next**.
3. Use the **Select** button to specify which files or codes you want to cluster. Click **OK**.
4. Using the drop-down menu for 'Clustered by', select whether you would like the similarity to be based on words, coding, or attributes.
5. Using the drop-down menu for 'Using similarity metric' select the coefficient type you require.
6. Click **Finish**.



Cluster analysis is not currently available in NVivo for Mac.

Social media visualizations

Social media data from sources such as Twitter and Facebook can be imported into NVivo using the NCapture tool. Once imported, a number of visualizations will be available via the tabs down the right-hand side of Detail View:

- Access the 'Chart' tab to view tweets in a number of different ways e.g. tweets over time, by user, or by hashtag.
- Use the 'Cluster Analysis' tab to view patterns in the data.
- Click the 'Map' tab to geovisualize i.e. see the geographic spread of social media commentators (note that this is drawn from the location stored in their profile, not the location at the time of making the post).



Social media visualizations are not currently available in NVivo for Mac.

Exporting visualizations

All visualizations can be exported from NVivo as image files. To export a visualization:

1. Right-click on the visualization and choose **Export Word Cloud**, **Export Tree Map**, **Export Chart**, **Export Map** or **Export Diagram** as required.
2. Select the location for the file.

3. Review (or enter) a filename.
4. In the **Save as** type list, choose the file format for the exported file.
5. Click **Save**.

Note the following image file formats for the different visualizations:

- **Word Clouds and Tree Maps:** PNG, JPEG, Bitmap, GIF, PDF.
- **Cluster Analysis:** JPG, Bitmap, GIF.
- **Word Trees:** JPEG, Bitmap, GIF.
- **Maps and Diagrams:** JPEG, Bitmap, GIF, PNG, TIF.
- **Charts:** PNG, JPEG, Bitmap, GIF, SVG, PDF.



Some additional export options are available on NVivo for Mac.

Notes

Memos

These are documents where the researcher(s) thoughts and observations can be recorded. To create a memo:

1. In Navigation View select the **Memos** folder (you may need to expand the top-level 'Notes' folder if you can't see this).
2. Right-click in List View and choose **New Memo**.
3. Name and describe your memo (a description is optional).
4. Click **OK** (Windows) and **Done** (Mac). Your memo will open in Detail View.
5. Once your memo is in NVivo, it can be useful to insert a date/time stamp. To do this, click inside the memo and from the **Memo/Edit** tab of the ribbon, choose the **Insert** button, followed by **Insert Date/Time**.



Memos created outside of NVivo can be imported in a similar manner to files.



The **Insert** → **Date/Time** function is located on the **Edit** tab of the Mac ribbon.

Memo links

Memo links are links between a file or code and a memo. **A memo can only be linked to one item.**

Creating memo links

To create a memo link to a new memo:

1. Choose the required file or code by selecting it in List View. Right-click and choose **Memo Link** → **Link to New Memo**.
2. Enter a name and description for your new memo (a description is optional).
3. Click **OK** (Windows) or **Done** (Mac). The new memo will open in Detail View.

To create a memo link to an existing memo:

1. Choose the required file or code by either selecting it in List View. Right-click on the item and choose **Memo Link** → **Link to Existing Memo**.
2. Select the memo you want to link to (note that previously linked memos will be greyed out).
3. Click **OK** (Windows) or **Select** (Mac). The linked memo will open in Detail View.

Opening linked memos

1. **From List View:** Any items with linked memos will display the memo link icon. To open the memo itself, right-click the item and from the menu that appears choose **Memo Link → Open Linked Memo**.
2. **From Detail View:** Open the file or code which has a linked memo, right-click, and from the menu choose **Links → Memo Link → Open Linked Memo**.

Deleting linked memos

There are several ways to delete a Memo Link:

1. **From List View:** Right-click the file/code that is linked and from the menu that appears choose **Memo Link → Delete Memo Link**.
2. **From Detail View:** Open the file or code which has a linked memo and from the right-click menu choose **Links → Memo Link → Delete Memo Link**.

Annotations

Annotations allow you to link additional notes to a piece of data, just like adding scribbled notes in the margin of a hard copy of a data file or sticking a post-it note on a transcript.

Creating annotations

1. Select the required text from within the file.
2. Right-click and from the pop-up menu that appears, select **New Annotation**.
3. The annotations tab will open at the bottom of Detail View, allowing you to enter the text for your annotation. Click back into the file when finished.
4. Your annotated text will appear highlighted in blue (you may need to 'deselect' the text before you can see this).



The annotations window doesn't appear at the bottom of Detail View, but instead appears in a comment-style box over the text.



Although you cannot code the content of annotations directly, you can code annotated text.

Displaying annotations

1. Open the required file or code so the contents are displayed in Detail View.
2. To open the annotations tab, from the **Document** or **Code** tab of the ribbon, tick the box for **Annotations**.
3. The annotations tab will be displayed at the bottom of Detail View. Select an annotation to see its text. (If you want to hide it again unselect the tick box from the ribbon).



Annotations don't appear at the bottom of Detail View, but instead appear in a comment-style box over the text. Hover your mouse over the blue highlight, and the annotation will appear.

Deleting annotations

To delete an annotation from a file or code:

1. Open the required file or code so that the contents are displayed in Detail View.
2. To open the Annotations tab, from the **Document** or **Code** tab of the ribbon, tick the box for **Annotations**.
3. Right-click on the required annotation and from the pop-up menu that appears, choose **Delete**. Click **Yes** to confirm deletion.



Hover over the annotation in the required file or code and then click the **Delete** button that appears in the bottom-left of the annotation.

See-also links

See-also links allow you to link from selected content in a file or code to selected content (or entire content) in another file or code.



See-also links are not currently available in NVivo for Mac.

Creating see-also links

To create a see-also link to an existing item:

1. Open the file you want to link from so that it is displayed in Detail View.
2. Select the text you want to create a see-also link from.
3. Right-click this text and choose **Links** → **See-also Link** → **New See-also Link**.

4. Ensure 'Existing Item' is selected in the 'Option' list.
5. Click the **Select** button.
6. In the left-hand pane, select the folder that contains the item you want to link to.
7. In the right-hand pane, select the item. Click **OK** (and then **OK** again).
8. Your see-also link will appear in the text with a pink highlight (you may need to 'deselect' the text before you can see this).

To create a see-also link to specific text:

1. Select the text you want to link to and right-click.
2. Choose **Copy**.
3. Select and right-click the content you want to link from.
4. Choose **Paste as See-also Link**.

If you are creating a link to a new item:

1. Open the file you want to link from so that it is displayed in Detail View.
2. Select the text you want to create a see-also link from.
3. Right-click on this text and choose **Links** → **See-also Link** → **New See-also Link**.
4. From the 'Option' list, choose '**New <item type>**' (depending on the type of item you want to create). Click **OK**.
5. A dialog box will appear asking you to name and describe the new project item (a see-also link to the entire item is also created at the same time).
6. Click **OK**.
7. The new item will open in Detail View.

Opening see-also links

1. Right-click on the link itself (i.e. inside the text marked with a pale pink highlight).
2. Choose **Links** → **Open To Item**. The linked item will open in Detail View.

Deleting see-also links

1. Right-click on the link itself (i.e. inside the text marked with a pink highlight).
2. Choose **Links** → **See-also Link** → **Delete See-also Link**.
3. Click **Yes** to confirm deletion.

Reference Management Software



Before importing into NVivo, you must export the data from your reference management software in the appropriate format. Once exported, the steps below can be followed.

Importing reference data from [EndNote](#)

1. On the **Import** tab, click the **Bibliography** button followed by **EndNote**.
2. Locate and select the XML file to import and click **Open**. The 'Import from EndNote' dialog box opens.
3. Review the default import options and make any required changes. Click **Import** (Windows) or **OK** (Mac).

Importing reference data from [Mendeley](#)

1. On the **Import** tab, click the Bibliography button followed by **Mendeley**.
2. Locate and select the RIS file to import and click **Open**. The 'Import from Mendeley' dialog box opens.
3. Review the default import options and make any required changes. Click **Import** (Windows) or **OK** (Mac).

Importing reference data from [RefWorks](#)

1. On the **Import** tab, click the Bibliography button followed by **RefWorks**.
2. Locate and select the RIS file to import and click **Open**. The 'Import from RefWorks' dialog box opens.
3. Review the default import options and make any required changes. Click **Import** (Windows) or **OK** (Mac).

Importing reference data from [Zotero](#)

1. On the **Import** tab, click the Bibliography button followed by **Zotero**.
2. Locate and select the RIS you want to import and click **Open**. The 'Import from Zotero' dialog box opens.
3. Review the default import options and make any required changes. Click **Import** (Windows) or **OK** (Mac).

Importing reference data from [Citavi](#)

1. On the **Import** tab, click the **Bibliography** button followed by **Citavi**.
2. Locate and select the XML file to import and click **Open**. The 'Import from Citavi' dialog box opens.
3. Review the default import options and make any required changes. Click **Import** (Windows) or **OK** (Mac).

NVivo for Teams

There are three options for working in a team with NVivo:

- NVivo Standalone
 - **Option 1:** Work with a single copy of the project, this can only be worked on by one team member at a time
 - **Option 2:** Multiple copies of the project for each team member (based on a master copy) – projects are regularly merged
- NVivo Collaboration Cloud
 - Allows for file transfer and coding to be synced between team members
- NVivo for Teams
 - Multiple team members can work at once

Most organisations only have a license for NVivo standalone, and this is the option we would recommend. In addition to the other sections of this training manual, the following two NVivo functions are particularly relevant to team projects.

Project merging

Note that we recommend backing up all project files before importing. It is also best that all team members are working with the same version of NVivo.

1. Open the project that you want to import into.
2. On the **Import** tab click **Project**.
3. Locate and select the project you want to import.
4. In the dialog box that opens, make the following selections:
 - a. Choose which project items you want to import.
 - b. Choose how you want to handle duplicate project items.
5. Click **Import**.
6. Note that the import may take a few minutes. Once it is complete, an import report will open – we don't personally find this useful, but you might want to check it out of interest.



When importing a project on the Mac, there is no opportunity to select the above options, your project will be imported as soon as you select it.

Coding comparison query

Note that in order to calculate this you may need to complete the project merging described above so that all team coding is contained within a single project.

1. On the **Explore** tab, select the **Queries** button followed by **Coding Comparison**.
2. Use the **Select** buttons (or the arrows on the Mac) to make a selection for user groups A and B in the 'Compare coding between' box (note that this is just 'Coder 1' and 'Coder 2', the use of the term 'groups' here is confusing).
3. In the 'At' box (or the 'Coded to' option on the Mac), click **Select** to choose specific codes. Click the arrow to see the options. Note that it pays to run this query on a specific selection of codes, otherwise the results may be overwhelming.
4. In the 'Scope' box (or the 'Search in' options on the Mac), click **Select** to choose specific files (if required).
5. Use the tick boxes to select whether you want to show the Kappa Coefficient and percentage agreement in the results (these are calculated by default on the Mac).
6. Click **Run**.

If you're not clear how to interpret the results of the coding comparison query, there are some excellent explanations in the help files.



The Mac version of NVivo has some additional options for coding comparison queries that you might like to explore.

Framework Matrices

Note that Framework Matrices are currently only available in the **Windows** version of NVivo.

Create a framework matrix

Note that in order to create a framework matrix based on your literature, cases must be created first (based on each individual reference).

1. On the **Create** tab click **Framework Matrix**.
2. Enter a name for the matrix, and a description (optional).
3. On the Rows tab click the **Select** button and choose the cases that will be the rows in your matrix (followed by **OK**).
4. On the Columns tab click the **Select** button and choose the codes that will be columns in your matrix (followed by **OK**).
5. Click **OK**.

Work with the associated view

The associated view is a code, containing coding references that were created by coding your files.

1. Click in the associated view.
2. On the Framework Matrix tab (in the View group) click the button for **Associated View**, then select **Row Coding**, **Cell Coding** or **Summary Links** as required.

Auto summarize

1. Click inside the framework matrix.
2. On the Framework Matrix tab (in the Summary group) click **Auto Summarize**.
3. Summaries will be automatically created. When the process finishes, a message tells you how many summaries in the matrix were updated.

Appendix A: Transcript Preparation

Will NVivo transcribe my audio recordings for me?

It is possible to purchase transcripts directly from within NVivo, and you can work directly with audio files without transcribing (although we wouldn't recommend the latter approach). You can also use a third-party transcription service and import your transcripts into NVivo. However, if you have time we would recommend transcribing your own files—this will assist enormously with the coding process.

Do I need to transcribe my recordings?

This is a much debated topic! We believe that where possible, it's important to transcribe your recorded data to help ensure a rigorous analysis process. Having said that, NVivo has the capacity to import and code audio files. This audio capacity in NVivo also allows for certain sections of the file to be transcribed, and for these sections to be directly attached to the section of the audio they relate to. While we recommend transcribing all data, if time and/or resources are an issue for you, then you could consider working solely with your audio recordings and/or notes.

Can I transcribe directly within NVivo?

While transcripts can be created directly within NVivo, there are advantages to transcribing in Word and then importing into NVivo. These include the AutoCorrect tools in Word and having two versions of your transcript for back-up purposes.

Is there any particular formatting I should avoid in my transcripts?

While there is no particular format that NVivo requires for transcripts, there are a few things are best avoided:

The screenshot shows a transcript window in NVivo with a header and a table of dialogue. Annotations with arrows point to specific elements:

- Header:** "Date and Location: February 19th, 2009, Bettie, North Carolina" (An arrow points to this header with the text: "Anything in the header or footer **will not import** into NVivo")
- Table:** A table with two columns: Speaker and Text.

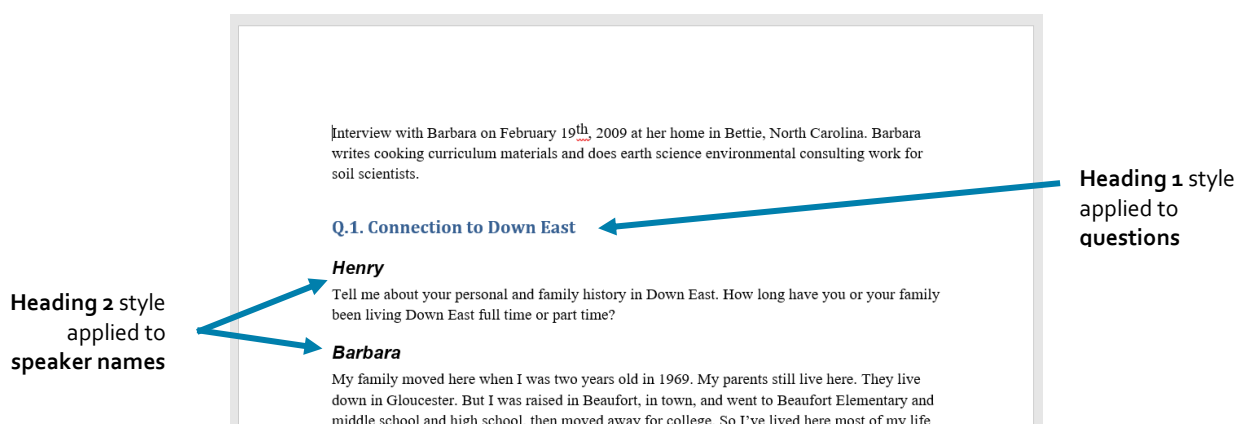
Henry	Tell me about your personal and family history in Down East. How long have you or your family been living Down East full time or part time?
Barbara	My family moved here when I was two years old in 1969. My parents still live here. They live down in Gloucester. But I was raised in Beaufort, in town, and went to Beaufort Elementary and middle school and high school, then moved away for college. So I've lived here most of my life although I've moved away.
Henry	And you've lived in the Down East community how long?
Barbara	Since '96. My husband and I bought this little cottage in '96.
Henry	And have you lived here full time since then or is it a part time – seasonal?
Barbara	It's part time. It was full time, but then in 2000 he got a job up North. And so since then we've been here on a very sporadic schedule. Sometimes full time but not always, because of my work down here – I was doing some environmental fieldwork down here that's kept me down here while he was up there.
- Text:** "Avoid anything specific to Microsoft Word e.g. highlights or tracked changes" (An arrow points to the highlighted text in Barbara's second entry: "They live down in Gloucester. But I was raised in Beaufort, in town, and went to Beaufort Elementary and middle school and high school, then moved away for college.")
- Table:** "Unless you are planning to link a transcript to your audio recording, **tables are best avoided**" (An arrow points to the table structure.)

Other than the things indicated above, pretty much any other type of formatting such as colour, styles, bold, italics, underline etc. is absolutely fine. If you have a favourite format for transcripts, feel free to use it.

Is there any special formatting that I can use to assist my analysis?

NVivo has a facility to 'autocode' sections of your data files. Autocoding doesn't mean your themes will be automatically coded for you – it's simply a means to organise similar sections of text together. For example, if you had a structured interview, you may wish to organise all respondents' responses to each individual question so that you can then go through and analyse one question at a time. Another example would be focus group data – you may wish to autocode your transcripts so that each individual person's response throughout the group transcript is organised together. Note that this appendix only discusses autocoding by styles (in relation to transcription preparation). **This feature is only available in NVivo for Windows** (NVivo for Mac does have other autocoding options however).

Styles in Word are sets of formatting characteristics that are 'bundled' together – they can be viewed on the Word ribbon (look for 'Heading 1', 'Heading 2'). See below for an example transcript with styles applied:



To make the most of autocoding, consider the following when applying styles in your transcripts:

- When entering questions, or speaker names, enter these on a separate line to the response.
- Use the same level of heading for each type of information e.g. all questions should have a Heading 1 rather than a mix of different styles.
- NVivo matches sections based on exact characters. Hence, ensure you are consistent with spelling of speaker names or question headers. For example, 'Q.1 Current use of time' will not be coded in the same place as 'Question One: Current Use of Time'.
- If you've asked long questions, don't apply the style to the entire question as this becomes the code name once autocoded. Enter in a short version of the question first, and if you wish, enter the full question afterwards without the style applied. An example of this can be seen in the sample project - the actual question was 'Tell me about your personal and family history in Down East. How long have you or your family been living Down East-full time or part time?', however the style is applied to a shorter label of 'Q.1. Connection to Down East'.

Note that it is possible to autocode on *speaker names* without styles being applied, but it is quicker to autocode this way (this is available in NVivo for Mac).

Appendix B: Qualitative Data Analysis

Will NVivo identify codes/themes for me?

Not as such, no. While there are some automation tools in NVivo such as visualizations, autocoding, and text queries that will assist with the identification of themes, generally speaking you need to process the data and identify codes and themes yourself. Without a clear understanding of this process, the concept of codes and how they work in NVivo will seem a little bewildering!

What is coding?

Coding is a central process in all qualitative methodologies, although researchers use the term in different ways. At a very simple level, codes are labels. The process of coding involves sifting through your data and identifying themes, topics, ideas, concepts, terms, phrases or keywords. Each piece of text is marked with a label, which means that you can easily retrieve all the text that relates to that label—think of a recipe index that helps you easily find the cake recipes versus the soup recipes. The text that you code could be single words, phrases, sentences or paragraphs. Note that the purpose of being able to retrieve this data marked with your label is not so that you can “count it” (this would be content analysis, which is more of a quantitative approach), but to allow you to identify patterns and interpret ideas.

How can I learn more about coding and qualitative data analysis?

1. Graham Gibbs’ YouTube channel has some excellent tutorials on coding, the playlist for these can be viewed at: <https://www.youtube.com/watch?v=7X7VuQxPfpk&list=PL14E49EDF20613008>.
2. There are a number of **textbooks** and **journal articles** that we would recommend. These include:

Bazeley, P. (2020). *Qualitative data analysis: Practical strategies* (2nd ed.). SAGE.

Braun, V., & Clarke, V. (2022). *Thematic analysis: A practical guide*. SAGE.

Braun, V., & Clarke, V. (2013). *Successful qualitative research: A practical guide for beginners*. SAGE.

Gibbs, G. (2018). *Analyzing qualitative data* (2nd ed.). SAGE.

King, N., & Brooks, J. M. (2017). *Template analysis for business and management students*. SAGE.

Miles, M. B., Huberman, M. A., & Saldaña, J. (2019). *Qualitative data analysis: A methods sourcebook* (4th ed.). SAGE.

Richards, L. (2015). *Handling qualitative data: A practical guide* (3rd ed.). SAGE.

Saldaña, J. (2021). *The coding manual for qualitative researchers* (4th ed.). SAGE.

Thomas, D. R. (2006). A general inductive approach for analyzing qualitative evaluation data. *American Journal of Evaluation*, 27(2), 237–246.

Appendix C: NVivo Reporting

While there's no "magic button" in NVivo that will create a summary report of your analysis, this doesn't mean that NVivo can't assist you with reporting—it's just not something that will happen automatically.

Working with code content

One of the easiest ways to report from NVivo is to open up the code(s) you want to report on, read over the contents, and summarise the data in your own words.

This technique obviously relies mostly on you and your summarisation/analysis skills, but there are some tools in NVivo that can help:

1. Print off the code(s) you're working with – open the code and choose **File** → **Print**.
2. If you want to include verbatim quotes in your write-up, these can be easily copied and pasted from NVivo into Word. You can also quickly drag and drop quotes from NVivo to Word.
3. Export the code(s) – right-click over the code in **List View** and choose **Export** → **Export Code**. Choose **Reference View** from the top of the dialog box to export as a Word file. Click **OK**.



To export code content on a Mac, right-click over the code in List View and choose **Export**. In the dialog box that appears, specify where you wish to save the content and select an appropriate file format. Click **OK**.

Coding, matrix coding and crosstab queries

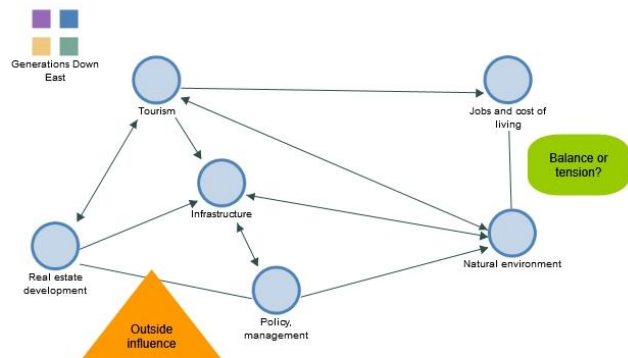
Coding, *matrix coding* and *crosstab* queries are excellent tools to look for patterns in your data and can be incredibly valuable at the reporting stage. Use them to look for possible overlaps between your codes (coding queries) or to compare sub-groups within your sample (matrix coding and crosstab queries).

	D : Habitat ▼	E : Landscape ▼	F : Renewable energy ▼	G : Water quality ▼
1 : Person:Age Group = 30 - 39 ▼	0	1	0	5
2 : Person:Age Group = 40 - 49 ▼	4	7	0	26
3 : Person:Age Group = 50 - 59 ▼	1	7	0	35
4 : Person:Age Group = 60 - 69 ▼	1	5	0	29
5 : Person:Age Group = 70 - 79 ▼	0	5	0	13
6 : Person:Age Group = 80 - 89 ▼	0	0	0	2

You probably won't want to report numbers from a matrix coding or crosstab query (unless this is appropriate for your data/analysis), but these are definitely some of the most powerful tools in NVivo and can enable a level of insight that isn't possible with more manual methods. Note that if you're wanting to conduct sub-group analysis you'll need to have *classifications* set-up in NVivo.

Visualizations

The saying “a picture paints a thousand words” definitely applies to NVivo as you’ll likely have thousands of words in your project! The visualization tools in NVivo can quickly communicate your findings to an audience. *Word trees, word clouds, cluster analysis, charts* and the maps feature (*mind maps, concept maps and project maps*) are all possibilities for reporting. These can all be easily exported (just right-click on the image and choose **Export**) and inserted/pasted into another application.



Reports

NVivo provides a number of predefined *formatted reports* and *text reports* which contain summary information about your project that you can view and print. Some reports also contain content from your sources and/or codes. While these are a little more “administrative” in nature, some NVivo users find that these provide a helpful overview, in particular the *coding summary by code* and *coding summary by source* reports. What’s the difference between a formatted report and a text report? They generate the same material, but a formatted report is created within NVivo and a text report is exported into another application.



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