NVivo: 12Pro
Essentials for Getting Started
Qualitative Data Analysis

Course objectives:
Making content into data
- Create a Project
- Working with Documents and Datasets
- Understand coding nodes and cases
- Explore and analyse data
- Use Visualisation tools

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**Exercise files:** Go to [https://web.library.uq.edu.au/library-services/training/training-resources](https://web.library.uq.edu.au/library-services/training/training-resources)
**NVIVO: 12Pro**

NVIVO is designed to facilitate common qualitative techniques for organising, analysing and sharing data in a research project. NVivo can help you manage, explore and discover patterns in your data but it cannot replace your analytical expertise.

### Exercise 1. Access NVIVO

#### Windows 10

1. Double-click the **Nvivo 12** icon

#### Mac 10.x.y

1. Open Nvivo 12 from Finder

2. Complete profile details, if prompted

3. Add your initials.

   These will be used to identify your edits as you progress

4. Click on **OK**

During your session you will receive on-screen prompts to save your progress. The save time can be changed via **File** (tab) – **Options** – **Notifications** (tab)

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**Please note:**

- NVIVO 12 Pro: Essentials for Getting Started
- The University of Queensland

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Getting Started

Exercise 2. Create a new project

1. Click on the Blank project option

2. Complete project details

3. Click Browse to save project to your preferred location.

Note: If you are collaborating with other users it is advisable to tick the checkbox to Write user actions to project event log

4. Click on OK

1. Click on Create new project

2. Complete project details

3. Click to save project to your preferred location.

4. Click on Create

The NVIVO interface

- Navigation View
- List View
- Details View
Building a Mind Map

When considering topics that may be present in your data you can create a mind map to visually explore potential concepts. These can be used as a brainstorming tool for Planning your node hierarchy, during analysis to explore how people talk about a topic or to plan how you will tell the story of your research.

a. **Create a Mind map**

1. Click on the Explore tab and click **Mind Map**

2. Enter a Name: **Mind Map Intro**

3. Add a **Description** (Optional)

4. Click on **OK**

   - **Navigation View**: Shows the main structure of your data.
   - **List View**: Displays data in a list format.
   - **Details View**: Provides detailed information about selected data.
Note the location “Maps” found in the Navigation view towards the bottom

A new tab for Mind Map tools will appear in the ribbon

5. Double click map Core Idea to enter text “Early thoughts on coding”

6. Click on Child Idea button
7. Add the text Economy
8. Repeat step 6 to add the child idea Real Estate Development to the Economy idea

9. Click on the Sibling Idea button
10. Add the text Fishing
11. Continue to create the Mind Map as shown:
   - **Select Fishing:**
     - Add Child = Commercial Fishing
   - **Select Commercial Fishing**
     - Add Sibling = Recreational Fishing
   - **Select core object:**
     - Add Child = Natural Environment
   - **Select Natural Environment:**
     - Add Child = Water Quality
     - Add Sibling = Habitat
     - Add Sibling = Landscape

12. Click the Floating Idea Button on the Mind Map tab

13. Add the text Community Culture
14. Click on the Fill button
15. Click on the Border Colour button
16. Click on the Border Width button
17. Select a wider border for the idea object

18. Select a layout for the Mind Map in the ribbon
18. Select a layout for the Mind Map in the side menu

b. Mind Map Output
   1. Right click in mind map area
   2. Select Export Map
      Alternatively
      • Click Share tab - Export
   1. Right click in mind map area
   2. Hover on Share
   3. Select PDF or Image

4. Enter details to save Mind Map as a static image
4. Enter details to save Mind Map
5. Click on Save

6. Click on File in ribbon

7. Select Close

8. Save project if prompted

Exercise 4. **Open a project**

A standalone project is a .nvp file saved on your computer or on a network drive.

1. Click the File tab
2. Click Open

Note: Ensure NVivo Projects from the File or Project type list is displayed

3. Locate and select project you want to open.
4. Click Open.
Exercise 5.  **Nodes from a Mindmap**

Nodes are like containers that hold all the content about a particular theme or topic in your project.

a. **Create Nodes from a mindmap**

1. Go to Maps
2. Double click *MindMap Intro*

3. On the Mind Map tab - click **Create as Nodes or Cases**

4. Select the **Nodes** folder
5. Click on **OK**

6. Select the **Nodes** folder
7. Click on **Select**

8. Click on **Nodes** in Navigation view

Empty nodes are created based on the Mind Map structure.
b. **Edit Nodes** - Nodes can be deleted or re-arranged. If a parent node is to be deleted but the child nodes retained, the child nodes need to be allocated a new parent node in the first instance.

If we wish to delete the Early thoughts on Coding node we will need to re-allocate all the child nodes below it.

1. Click on **Economy** node
2. Hold Ctrl and Click on **Natural environment** node

If we wish to delete the Early thoughts on Coding node we will need to re-allocate all the child nodes below it.

1. Click on **Economy** node
2. Hold Cmd and Click on **Natural environment** node

3. Drag these selected nodes over the Nodes folder in the Codes area of the Navigation View

Note: If you drag into the Quick Access area at the top of the Navigation view you will create Shortcuts to the nodes. If you do this and wish to remove the shortcut right mouse click the shortcuts and choose Remove from Quick Access

4. Right click on the **Early thoughts on coding** node in the List View
5. Select **Delete**
6. Click on **Yes** to confirm deletion
Exercise 6.  Add file structure

1. Navigate to Data
2. Right Click Files
3. Select New Folder

4. Enter Interviews in the Name area
5. Repeat for Survey Data

Working with Data

Exercise 7.  Prepare Content

⚠️ This exercise uses Microsoft word and is preparation of data prior to importing into a project although styles can be added to a document within Nvivo.

**NVivo on Mac** does not need to do this, as it can not AutoCode by paragraph styles

1. Open Barbara.docx in Interviews folder within the files downloaded before the session

2. Apply heading styles to the Interview text:
   - Heading 1 – Question 1
   - Heading 2 – Names (Henry and Barbara)
   - Interviewer – Questions asked
3. Save and Close Barbara.docx

Adding styles to your text in Microsoft word can improve how it is coded in NVivo

Exercise 8.

Import Content

a. Bring in a document

1. Select Interviews folder
2. Click the Import tab
3. Click the Files button
4. From the downloaded course files: Select All interviews in interviews folder
5. Click on Open
6. Click on Import

1. Select Interviews folder
2. Click the Data tab
3. Click the Documents button
4. From the downloaded course files: Select All interviews in interviews folder
5. Click on Import
7. Click on **OK** in the Document Properties window, if required

**Note**: Your files are added to the interviews folder

8. Doubleclick an interviewee to view content

As you access each source it will display in a tab of its own in the detail view pane. Click the cross to close a tab
**Coding Nodes and Cases**

Coding allows you to organize your sources for later data analysis. Applying coding to your content will organise text into certain nodes/containers. This is the start of the process to make your content into data.

There are two approaches to coding source content

1. Organise the data into broad topics then explore your nodes for each topic and do further coding
2. Perform detailed coding as you go through sources, creating nodes as you need them and later combining or grouping nodes into related categories.

**Exercise 9. Coding to new nodes**

a. **Code data manually**

1. Double click to view the details of an interview (Barbara)

2. Highlight a line of text
3. Right click the selection
4. Select Code

   Alternatively, Click Code on the Document tab

5. Click the New Node button
6. Enter a name for the node ‘Years in Town’
7. Click on OK

8. Check the list of Data - Files. Coding has been added to the first interview
9. Repeat for another line of text
10. Add to the ‘Years in Town’ node
Check the list of Data - Files.

11. Open another interview (Charles)
12. Navigate to Nodes
13. Select text
14. Drag over node ‘Years in town’
15. Repeat for another interview – (Dorothy)

**Exercise 10.**

**Display Coding**

This setting only applies to the data currently in view. It is not a global setting and will have to be switched on/off, as required, for every source opened.

1. Go to the Document Tools - Document Tab
2. Click on Coding Stripes
3. Select Recent Coding

1. Go to the View Tab
2. Click on Coding Stripes
3. Select Nodes Recently Coding

The coding density will display and the node will show with a bar to identify each reference.
Click on the coding stripe to highlight your coding in the document

**a. Remove code**

1. Right click on a coding stripe
2. Select Uncode
b. Remove highlight

3. Go to the **Document Tools – Document Tab**
4. Click on the **Highlight** button
5. Select **None**

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**Exercise 11.**

**Coding to existing nodes**

a. Code documents

1. Navigate to **Data - Files**
2. Open a interview
3. Select some text
4. Right click on selected text
5. Select **Code…**

6. Hold Ctrl key to select nodes:
   - **Community Culture**
   - **Realestate Development**
   - **Natural Environment**
7. Click on **OK**

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3. Go to the **View Tab**
4. Click on **Coding Stripes**
5. Select **None**

6. Tick the box next to each node you wish to code to
7. Click on **Select**
Check the Node hierarchy, coding has been added to the appropriate nodes

Repeat for other interview responses

View Node Coding

1. Go to Nodes
2. Double Click to open Fishing

3. The node content will display each reference under a source link
   The amount of the source coded is shown as a percentage. Click the blue link to open the source and view the coding
Exercise 13. **Auto Coding – Nodes**

Please be aware this Autocoding in this way only works when using a PC. Autocoding is only available for Datasets (set out in columns and rows) if you use NVivo for Mac.

a. **Based on structure**

Autocoding by structure works based on styles, and the use of consistent use of styles is critical.

**What we'd like to code are the responses to each question** - In the sample data each question has the Heading 1 style applied and we can use this to autocode.

1. Navigate to **Data - Files**
2. Select all the interviews
3. Go to the **Home** tab
4. Click on **Auto Code**

Auto Coding by paragraph styles is not available on NVivo for Mac

5. Autor Code Wizard will launch
6. Choose Paragraph styles and click Next
7. Click on the style to be coded - **Heading 1**
8. Click the >> arrows to transfer right
9. Click on **Next**

10. Click the **Under** field
11. Select **New Folder**
12. Add a name - **Interview Questions**
13. Click on **Finish**
Exercise 14. **View Node References**

14. Click **Nodes** in the Navigation view

   Double-click Nodes to expand if necessary

   Not something that can or needs to be done on NVivo for Mac. Still related to paragraph style AutoCoding

15. Click on **Interview Questions**

   References will be displayed in detail view

16. Double click on a question node

   Content will be displayed in the Details View

4. Click on the source link at the top of each reference to open the source

5. Scroll through the node questions to see the other coded source content
Exercise 15.  

**Merge Nodes**

1. Right click on the last question in **Nodes/Interview Questions**  
   Not something that can or needs to be done on NVivo for Mac. Still related to paragraph style AutoCoding

2. Select **Cut**

3. Right click on the last Q.6.

4. Select **Merge into Selected Node**

5. Click on **OK**

Check the sources and references totals have been merged
Working with Cases

Exercise 16.  Auto coding - Cases

Cases are simply a different type of Node or container. Cases can help keep all data related to a given participant in one place. eg If you are doing a longitudinal study or are working with demographic data.

*What we’d like to code is every interviewee as a case – in the interview documents each speaker has the heading 2 style applied to their name*

1. Select all the interviews in Data - Files
2. Go to the Home tab
3. Click on Auto Code
4. Choose Paragraph styles from the Auto Code Wizard

5. Click on Heading 1
6. Click the << arrows to transfer left
7. Click on the style to be coded - Heading 2
8. Click the >> arrows to transfer right
9. Click on Next

10. Click the Under field
11. Select Existing Folder
12. Click on Select... next to the Name field
13. Select Cases

**Note:** This is not the same feature as seen on the PC, it is creating case coding based on speaker, not based on paragraph styles

1. Navigate to Data - Files
2. Select a single interview
3. Go to the Analyze tab
4. Click on Auto Code
5. Click By Speaker

6. Auto Code Wizard will launch
7. Type in the name of a Speaker
   - Click the + button to add them
8. Add additional speakers as needed
14. Click on **OK**

15. Click on **Finish**

![Image of NVivo interface showing OK button]

9. Add a name for a new classification in cases

10. Click **AutoCode**

![Image of NVivo interface showing AutoCode option]

b. **Case organisation - Parent Node**

1. Navigate to **Cases** in the navigator

2. Right click below list of case names

3. Select **New Case**

4. Add name – **Interviewer**

5. Repeat steps 1-3 for **Interviewee**

6. Click on the marker alongside **Henry**

![Image of NVivo interface showing a new case named Interviewer]

1. Navigate to **Cases** in the navigator

2. Right click below list of case names

3. Select **New Top Level Case**...

4. Add name – **Interviewer**

5. Repeat steps 1-3 for **Interviewee**

6. Click on the marker alongside **Henry**

![Image of NVivo interface showing a new top level case named Interviewer]
7. Drag over Interviewer

8. Repeat for Nancy, Linda and Elizabeth

8. Hold CTRL to select all other case names

9. Drag selection over Interviewee

7. Drag over Interviewer

c. **Aggregation of data**

1. Right click on the Interviewer case

2. Select **Aggregate coding from children**
   
The totals for child sources and references will be displayed.

3. Repeat for the Interviewee case

   This is a toggle option repeat to hide aggregation.
Exercise 17.  

Survey results and other datasets

You cannot edit the contents of a dataset once it is imported.

A dataset contains structured data arranged in columns and rows. One method of creating a new dataset in NVIVO is to import it from a spreadsheet, text file or database file.

a. Bring in survey data

1. Navigate to Data - Files
2. Click the Survey Data folder
3. Click on the Excel button on the Import tab
4. Select Survey data.xlsx
5. Click on Open
6. Confirm the survey wizard settings:
   a. Respondents will be cases
   b. Closed questions have attributes
   c. Open questions are nodes
7. Click on Next

1. Navigate to Data - Files
2. Click the Survey Data folder
3. Click on the Dataset button on the Data tab
4. Select Survey data.xlsx
5. Click on Open
6. Confirm which sheet to import from the file. Survey data
7. Click on Next
8. Check and confirm:
   - Question headers
   - Date format
   - The worksheet tab for data

9. Click on Next

10. Confirm the destination for dataset cases

11. Indicate the column for a unique identifier for each item

12. Select Create new classification

13. Click on Next

14. Identify data questions type and import status

15. Click on Finish
16. Click on **Close** to display data in details view

Data will display as an internal source and in list view. You cannot sort or filter by the first column. This is NVIVO’s own added reference.

Grey shaded columns are closed ended questions (**Classifying data**)
White shaded columns are open ended responses (**Codable data**)

Survey data can be viewed in a table or by individual forms

17. Select the appropriate tab to change the view

This happens automatically when importing survey data on Windows

14. Click **Auto Code** on the **Analyze** tab
15. Select **Dataset**
16. Ensure the first option is selected

17. Click **Next**

18. The columns that were marked as **Codeable data** should all be selected

19. Click **Next**

20. The default options will make a set in our **Nodes** area just for the Survey data

21. Click **Auto Code**
We then need to repeat for Cases

22. Click **Auto Code** on the **Analyze** tab

23. Select **Dataset**

24. Change the selection to **Code at cases for each value in a column**

25. Click **Next**

26. In the drop down select which column has the unique identifier for your survey participants. **Respondent** in this data

27. Click **Next**

28. Click **Next**
29. In order to get classification data from the survey such as gender assigned to each case. Select **Classify cases from classifying columns**

This will give you the option of which classifying data from the import you wish to include as classification data for each participant.

30. Click **Auto Code**

### b. Viewing imported Survey Dataset - Nodes

1. Click on **Nodes** in Navigation Pane
2. Select **Survey Data** under Nodes

This displays the open ended questions the respondents were asked.

1. Click on **Nodes** in Navigation Pane
2. See **Survey Data** in Nodes

This displays the open ended questions the respondents were asked. If you want a folder for your survey data to separate, right click **Nodes**, add a new folder then drag the Survey data to it.
3. Double click the first node to display references in Detail view  
   Remember each Node will open in a new tab

1. Expand Cases in Navigation Pane
2. Select Survey Data folder
   This displays each respondent as a case and the references created from their open ended responses

3. Double click a case with 4 references to display references in Detail view

The references will be listed and the original can be displayed

4. Click the source link

5. Click the Form tab
   The responses can be viewed in detail.
Querying Data

Exercise 18. Create a Matrix Coding Query

Matrix coding query can easily compare coded material across different demographics or among themes. This can help you see patterns in your data and help you answer questions about your research. We can look at the intersect between nodes and classification attributes.

a. Matrix Query – Do different genders view development differently?

1. Click Query Wizard on the Explore tab
2. The Query Wizard opens
   Note: If you choose Matrix Coding you need to create the Matrix Query without the wizard
3. Choose Find coding intersections between two lists of items
4. Click next

1. Click Matrix coding on the Query tab
   Note: on NVivo for Mac you need to create the Matrix Query without a wizard
2. Click + in the Rows area of the Query options
3. Click Select Attribute Values...
4. Click the Add Selected Items... button
   Create a row for each gender value - Female & Male only
5. Expand the Gender field under Survey data
6. Hold shift to select all choices
7. Click Select Attribute Values
6. Click the **case classifications** text
7. Expand **Survey respondents** then expand **Gender**
8. Select **Male** and **Female**
    
    Case nodes represent attributes for people or places in the content

9. Click on **OK**
10. Click on the **Add Attribute Condition**... button and select an Attribute if necessary
11. Click **Next**

12. Click **Add Selected Items**

13. Select the theme nodes for the **Survey Data** to cross tabulate in your matrix.
Theme nodes represent coded text in the content

Nodes > Survey Data > Select three questions

14. Click on OK
15. Click Next

16. Search in: Files & Externals
17. Click Next

18. Select Add this Query to Project
19. Select Name and enter name e.g. Matrix Query practice
20. Enter Optional Description if you wish
21. Click on Run

If you click OK you don’t actually query the data.

The query results are displayed in the Matrix Query – Results Preview tab in the Details view
22. You can run the query anytime from **Search - Queries** in the Navigation view pane.

23. To save the query results use **Save Results...** button on the Matrix Query – Results Preview page (top right)

13. You can save the query in order to run at a later time click Save Query...

14. To save the results of the query use **Save Results...**

b. **Viewing and amending matrix results**

1. Click **Matrix Tools – Matrix Tab**
2. Select **Words Coded**

NVivo for Mac can only show Coding references for Matrix results

The number of words coded by each gender for each question will be displayed.

3. Double click on any number to see the coded references

4. Select the **Matrix Query – Results Preview** tab
5. Click the **Chart** tab at the right side of the screen

No charting for matrix query results available on NVivo for Mac
Exercise 19.  

‘Word Frequency’ Query

Provides an idea of potential trends at a high level.

1. Go to Explore tab
2. Click on Word Frequency
3. Set parameters for query
   - **Search:** Files & Externals
   - **Display:** 50 most frequent words
   - **Minimum length:** 3
4. Click on Run Query on the right
5. Click on Add to Project for future use

The results will be displayed. NVivo has a built in filter to avoid filler words like it, is and that.

a. Exclude words in query
   1. Right click on east in results list
   2. Select Add to Stop Words list

1. Go to Query tab
2. Click on Word Frequency
3. Set parameters for query
   - **Search:** Files & Externals
   - **Display:** 50 most frequent words
   - **Minimum length:** 3
4. Click on Run Query
5. Click on Save Query... for future use

The results will be displayed. NVivo has a built in filter to avoid filler words like it, is and that.

1. Right click on east in results list
2. Select Add to Stop Words list
3. Click on **OK**
4. Re-run the query

![Add Stop Words](image)

b. **Automatic word grouping**

1. Change grouping to **With stemmed words**

![Word Frequency Criteria](image)

2. Re-run the query

C. **Add query to project for reuse**

1. Click the **Add to project** button
2. Enter a name for the query
3. Click on **OK**

![Word Frequency Query](image)

1. Change Finding matches to **Include stemmed words**

![Word Frequency Criteria](image)

2. Enter a name for the query
3. Click on **Save Query**

![Save Query](image)
4. Navigate to **Search - Queries** and view saved project queries

This is not the results, only the query settings

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Exercise 20. **Create a Word Query**

1. Click on the **Word Cloud** tab, below the **Summary**, at the right of the results list

2. Go to the **Word Frequency Query** tab

3. Select an alternative design

4. Right click on **Word Cloud**

5. Select **Export Word Cloud**

6. Enter a **filename**

7. Click on **Save**

You will have a static image of the word cloud generated from your text query

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1. Click on the **Word Cloud** tab, next to **Summary**, at the top of the results list

2. Click the **Gallery** button

3. Select an alternative design

4. Right click on **Word Cloud**

5. Select **Export...**

6. Enter a **filename**

7. Select file type

8. Click on **Ok**

You will have a static image of the word cloud generated from your text query
a. **Single word query**

1. In the word cloud, right click on the word “Waters”
2. Select Run Text Search Query for waters
3. Click on the Reference tab to see waters with more context
4. Click on the Word Tree tab.

The word tree groups together words which appear frequently before and after the word water.

b. **Word tree query**

1. In the Word tree, right click on the word “Quality”
2. Select Run Text Search Query

1. In the word cloud, right click on the word “Waters”
2. Select Run Text Search Query
3. Click on the Reference tab to see waters with more context
4. Click on the Word Tree tab.

1. In the Word tree, right click on the words “it is to keep these”
3. Click on the **Summary** tab to see where water quality is mentioned in the interviews.

4. Click the **Reference** tab for more context.

5. Click on the **Word Tree** tab to see a new word tree.

6. Click on **Save Results**...

7. Enter a name.

8. Click on **OK**.

*Be aware the word tree is not retained when you choose Save Results... To display the word tree you have to re-run the query.*

**Visualization Tools**

**Exercise 21.**

**Diagrams**

a. **Explore diagram**

1. Select a Data – File or Case e.g. *(Dorothy)*

2. Click **Explore Diagram** on the Explore tab.
The diagram appears in details view

3. Click on a surrounding item
4. Click the Change Focus button on the Explore Diagram tab
   Use the ribbon to see more connections

3. Click on a surrounding item
4. Click the Change Focus button on the Explore Diagram bar

5. Click the back button to navigate through the diagram
6. Double click any item to view its content

7. An explore diagram is NOT stored as part of a project. To save the diagram
   - Copy and paste into a memo
     a. Click and drag across image to select all elements
     b. Copy: ctrl C
     c. Click Memo on Create tab
     d. Add a new memo name
     e. Click OK
     f. Paste: ctrl V

   Cannot copy diagram content into a memo on NVivo for Mac
• Export as an image
  a. Right click on diagram
  b. Select Export Diagram
  c. Navigate to a location
  d. Click on Save

• Export as an image
  e. Right click on diagram
  f. Select Export Diagram
  g. Navigate to a location
  h. Pick a file type
  i. Click on Save

b. Comparison diagram
A comparison diagram lets you compare two of the same type of project items, sources, nodes or cases. The comparison indicates the similarities and differences between items.

1. Click Comparison Diagram on the Explore tab
2. Select Compare Cases

3. Select 2 interview participants
4. Click on OK
The comparison diagram opens in detail view

3. Select 2 interview participants
4. Click on Select
The comparison diagram opens in detail view
Everything items have in common is in the centre of the diagram. Links to item differences are shown either side of the diagram.

3. Double Click any item to open and view content

5. An comparison diagram is NOT stored as part of a project. To save the diagram
   - Copy and paste into a memo
   - Export as an image

(See previous exercise)

Cannot copy content to Memo on NVivo for Mac
Extension Exercises

Memos, annotations and links

Memos are an integral part of the research process. They are like documents or notes that can be linked to other sources or nodes. A memo can be about the entire project or it can link to a specific node or item. Annotations in NVIVO are like notes in the margin. See Also Links can be used as cross references between related items in your project.

Exercise 22.  

Create a Memo

1. Click on Memo on the Create Tab

2. Enter a Name – Couple1

3. Click on OK

4. Enter any notes relating to your source

5. Click Close cross on memo tab. NVivo will automatically save whatever you type.

6. Go to Memos in Sources

   The new memo will be displayed in list view

2. Enter a Name – Couple1

3. Click on Done

4. Enter any notes relating to your source

5. Click Close cross on Open Items windo in bottom left. NVivo will automatically save whatever you type.

6. Go to Memos in Notes

   The new memo will be displayed in list view
Exercise 23.  
**Link a Memo**

To link memos to a source item, go to the source item first. Memos can only be linked to a single source item. Anything already linked will be unavailable.

1. Go to **Data - Files**
2. Click on **Maria and Daniel** in interviews
3. Click the **Home** tab
4. Click the **Memo Link** button
5. Select **Link to Existing Memo**

6. Select the **Couple1** memo.
7. Click on **OK**

**View memo or linked item**

1. Go to **Notes - Memos** in Sources
2. Select the memo with the link
3. Click the **Memo Link** icon on the home tab
4. Select **Open Linked Item**

1. Go to **Notes - Memos** in Sources
2. Select the memo with the link
3. Click the **Memo Link** icon on the **Analyze** tab
4. Select **Open Linked Item**
Exercise 24.

Annotations

Annotations are like margin notes you can record comments, reminders or observations. These will display with a blue highlight in the text.

a. Create an Annotation

5. Open a Data - File interview
6. Select text to annotate
7. Go to the Document Tab
8. Click the New Annotation button

A number is added at the bottom of the screen for your annotation. Click on this number to navigate to the annotation.

5. Start typing your annotation
6. Click into the source content when complete

Annotated text is highlighted in blue

b. Edit annotations

1. To see all annotations in a project click Notes – Annotations in the navigator view

2. In List View: Double click to open a source
3. Select Click to Edit

3. In List View: Double click to open a source
4. In Nodes: Double click to open a node. All nodes connected to sources will be visible and annotation editing is activated automatically.

   - **Annotations**
     - Item: 1
     - Content: Commercial fishing

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**Exercise 25. Adding a “see also” link**

A ‘see also’ link is like a cross reference to connect items in an NVivo project. These will display with a pink highlight in the text.

**a. Link to an existing source**

1. Select text to link from
2. Click **Document tab - See Also Link**
3. Click **New See Also Link…**
4. Click the **Select** button.
5. Navigate to the item to link to
6. Select the item
7. Click on **OK**
8. Click on **OK**

The ‘See Also’ link will be added and link text will be pink.
b. **Go to See Also links – in Notes** in the Navigator view

1. Right click on the link details
2. Select **Open to Item** to open the linked item
   
   Or

   Select **Open from Item** to open where the link was created