



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

Student Training and Support

Phone: (07) 334 64312
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Web: <https://web.library.uq.edu.au/library-services/training/>

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Exercise files: Go to <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.

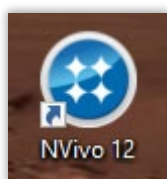
Exercise 1.

Access NVIVO

Windows 10

Mac 10.x.y

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

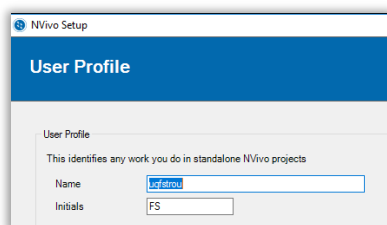


1. Open Nvivo 12 from Finder

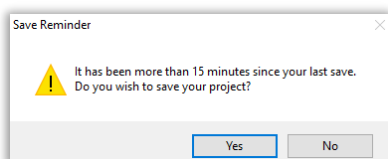
2. Complete profile details, if prompted
3. Add your initials.

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)

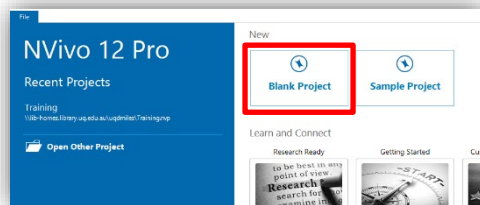


Getting Started

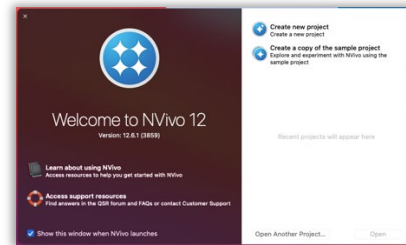
Exercise 2.

Create a new project

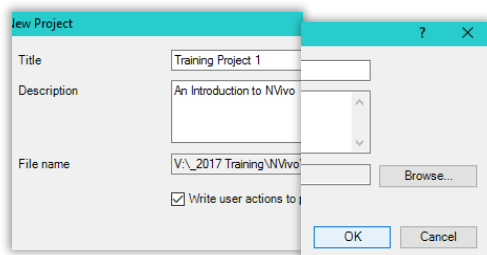
1. Click on the **Blank project** option




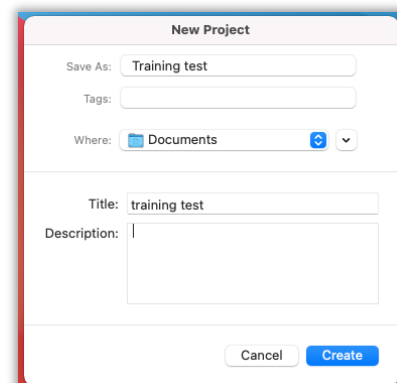
1. Click on **Create new project**



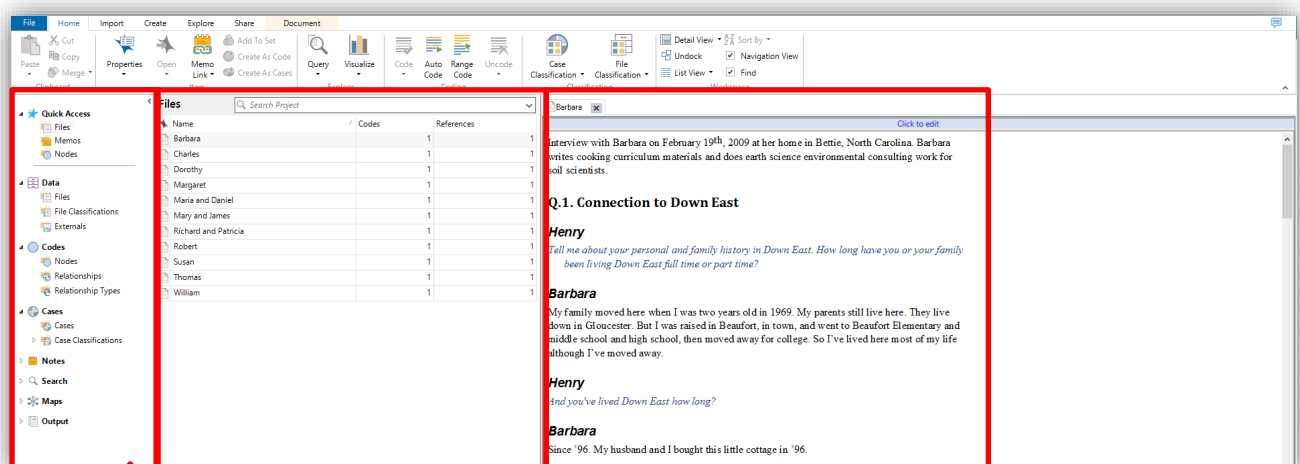
2. Complete project details
 3. Click **Browse** to save project to your preferred location.
- Note:** If you are collaborating with other users it is advisable to tick the checkbox to Write user actions to project event log
4. Click on **OK**



2. Complete project details
3. Click  to save project to your preferred location.
4. Click on **Create**



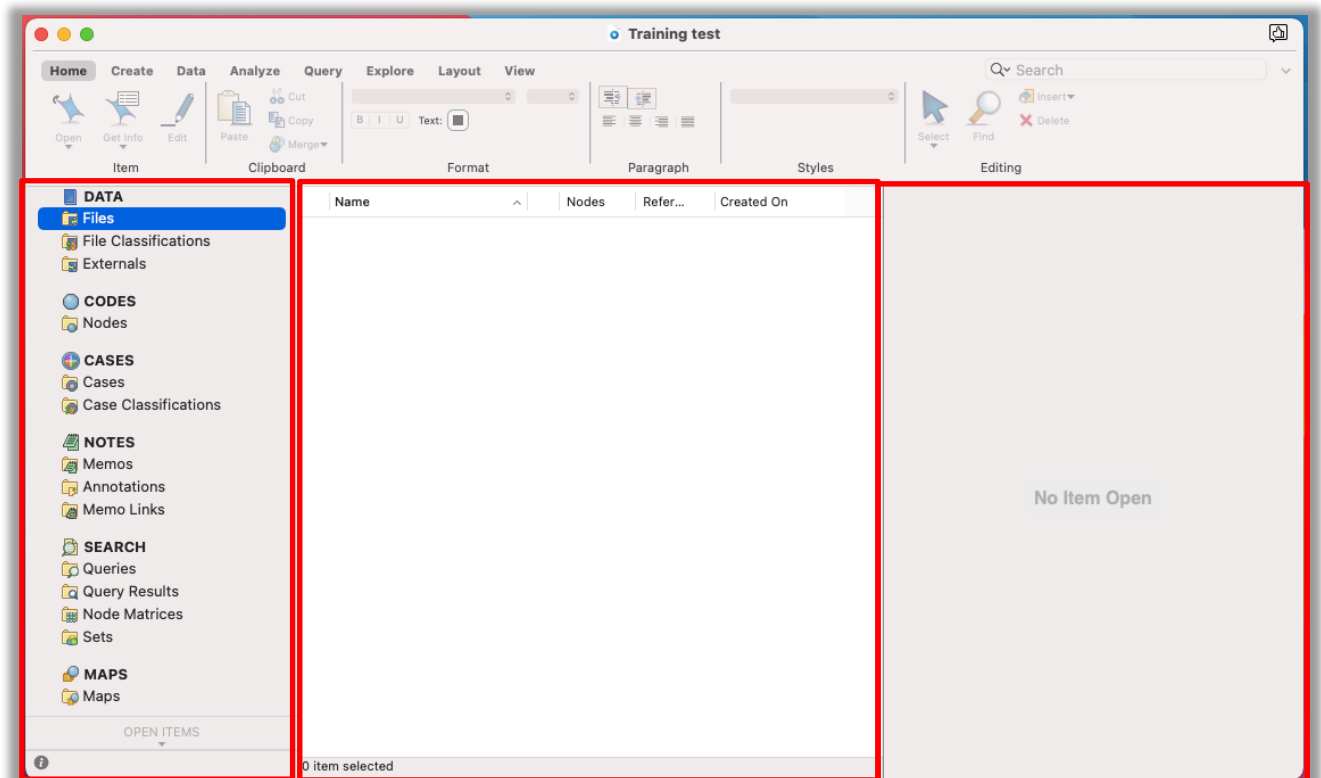
The NVIVO interface



Navigation View

List View

Details View



Navigation View

List View

Details View

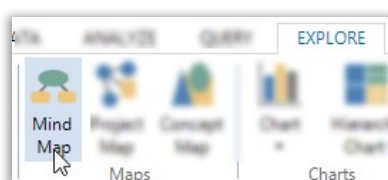
Exercise 3.

Building a Mind Map

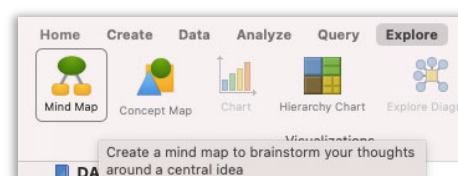
When considering topics that may be present in your data you can create a mind map to visually explore potential concepts. These can be used as a brainstorming tool for Planning your node hierarchy, during analysis to explore how people talk about a topic or to plan how you will tell the story of your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

a. Create a Mind map

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

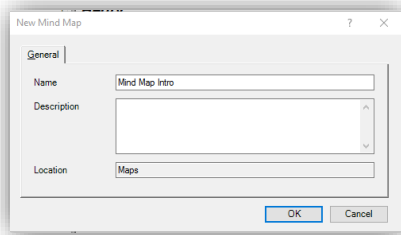


2. Enter a Name: **Mind Map Intro**
3. Add a **Description** (Optional)
4. Click on **OK**

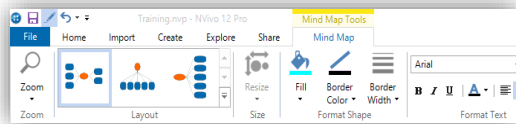


2. Enter a Name: **Mind Map Intro**
3. Add a **Description** (Optional)
4. Click on **Done**

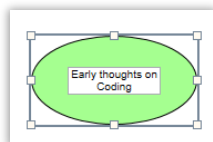
Note the location “Maps” found in the Navigation view towards the bottom



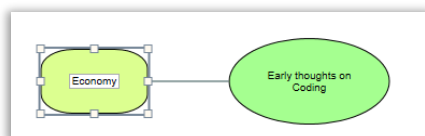
A new tab for Mind Map tools will appear in the ribbon



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

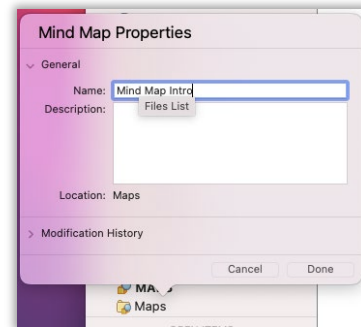


6. Click on **Child Idea** button
7. Add the text **Economy**
8. *Repeat* step 6 to add the child idea **Real Estate Development** to the Economy idea



9. Click on the **Sibling Idea** button
10. Add the text **Fishing**

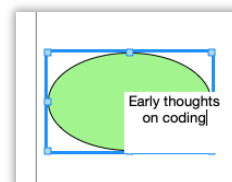
Note the location “Maps” found in the Navigation view towards the bottom



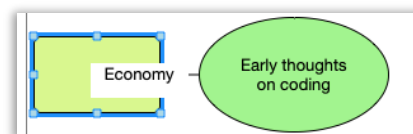
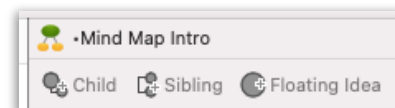
A new sidebar will appear on the right with Mind Map tools



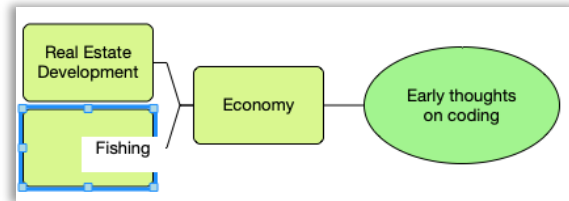
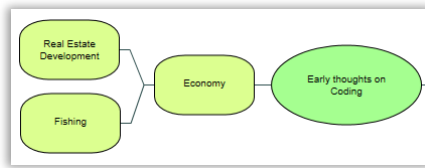
5. Double click map **Core Idea** to enter text “Early thoughts on coding”



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

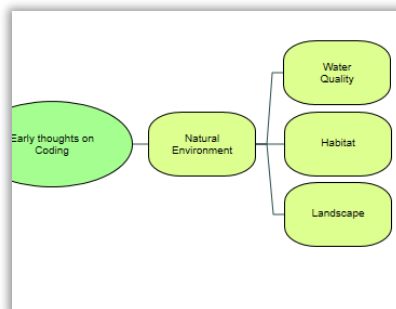
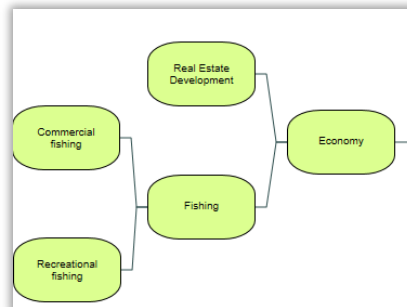


9. Click on the **Sibling Idea** button
10. Add the text **Fishing**

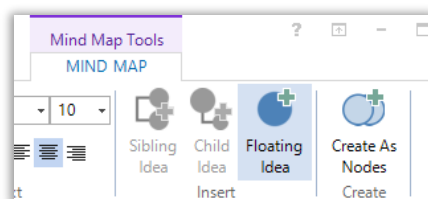


11. Continue to create the Mind Map as shown:

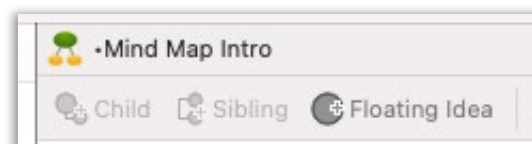
- *Select Fishing:*
 - Add **Child** = Commercial Fishing
- *Select Commercial Fishing*
 - Add **Sibling** = Recreational Fishing
- *Select core object:*
 - Add **Child** = Natural Environment
- *Select Natural Environment:*
 - Add **Child** = Water Quality
- *Select Water quality:*
 - Add **Sibling** = Habitat
 - Add **Sibling** = Landscape



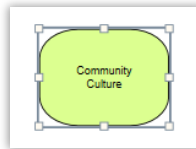
12. Click the **Floating Idea** Button on the Mind Map tab



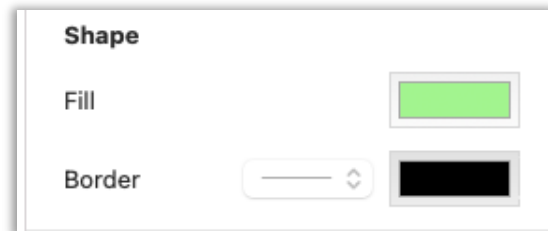
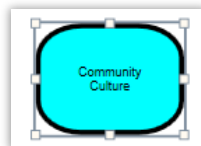
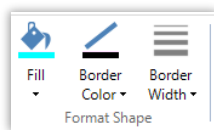
12. Click the **Floating Idea** Button on the Mind Map tab



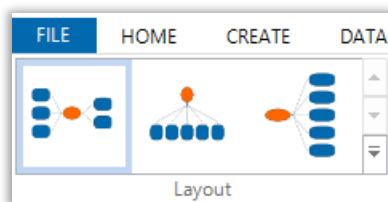
13. Add the text Community Culture



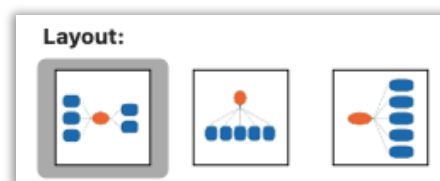
14. Click on the **Fill** button
15. Click on the **Border Colour** button
16. Click on the **Border Width** button
17. Select a wider border for the idea object



18. Select a **layout** for the **Mind Map** in the ribbon



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



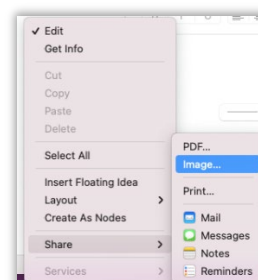
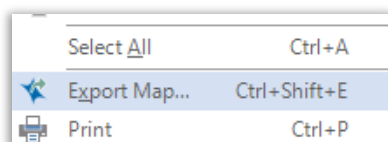
b. Mind Map Output

1. Right click in mind map area
2. Select **Export Map**

Alternatively

- Click **Share** tab - **Export**

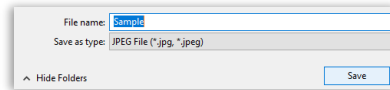
1. Right click in mind map area
2. Hover on **Share**
3. Select **PDF** or **Image**



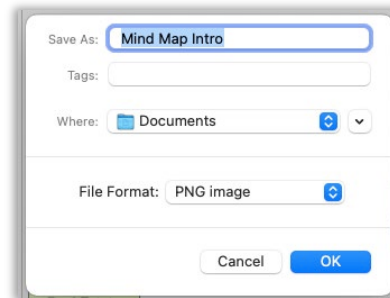
4. Enter details to save Mind Map as a static image

4. Enter details to save Mind Map

5. Click on **Save**



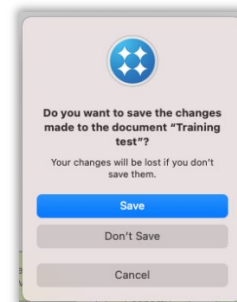
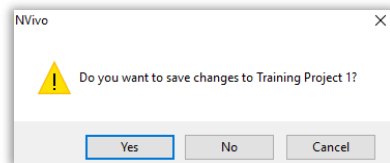
5. Click on **Ok**



6. Click on **File** in ribbon

7. Select **Close**

8. Save project if prompted



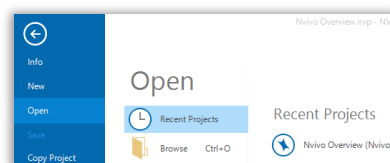
Exercise 4.

Open a project

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

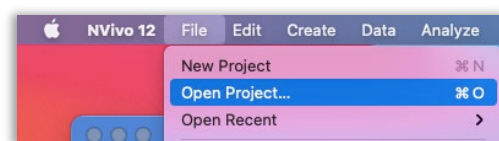
1. Click the **File** tab

2. Click **Open**



1. Click **File**

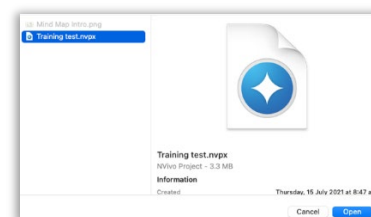
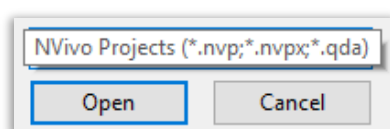
2. Click **Open Project...**



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**.

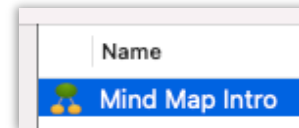
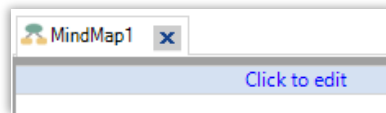


Exercise 5. *Nodes from a Mindmap*

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

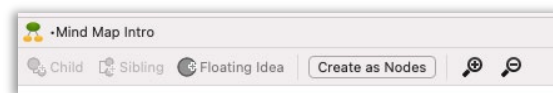
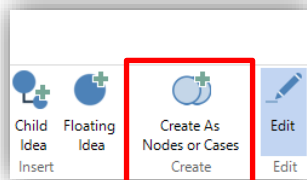
a. Create Nodes from a mindmap

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



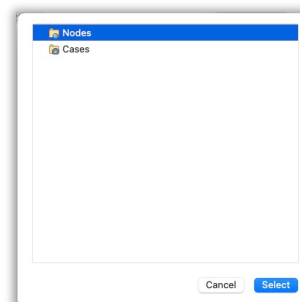
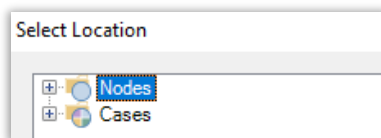
3. On the Mind Map tab - click **Create as Nodes or Cases**

3. On the Mind Map menu bar - click **Create as Nodes**



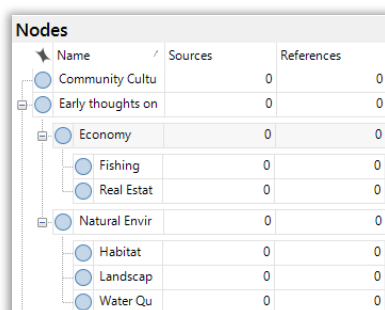
4. Select the **Nodes** folder
5. Click on **OK**

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

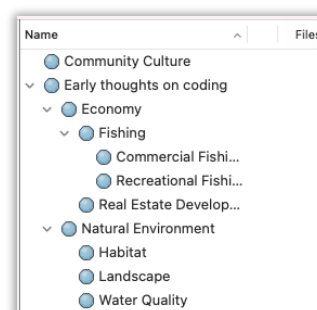


8. Click on **Nodes** in Navigation view

Empty nodes are created based on the Mind Map structure.



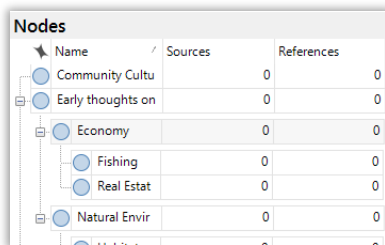
Name	Sources	References
Community Cultu	0	0
Early thoughts on	0	0
Economy	0	0
Fishing	0	0
Real Estat	0	0
Natural Envir	0	0
Habitat	0	0
Landscape	0	0
Water Qu	0	0



- 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



Name	Sources	References
Community Culture	0	0
Early thoughts on Coding	0	0
Economy	0	0
Fishing	0	0
Real Estate Development	0	0
Natural Environment	0	0

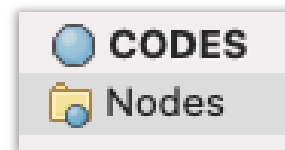
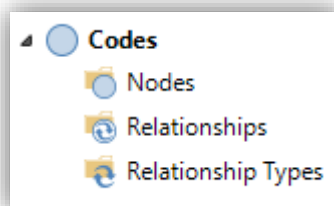
If we wish to delete the Early thoughts on Coding node we will need to re-allocate all the child nodes below it.

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

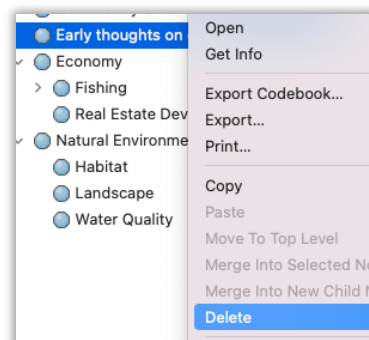
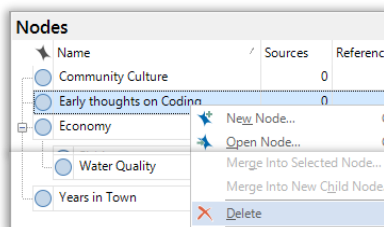


3. Drag these selected nodes over the Nodes folder in the Codes area of the Navigation View

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

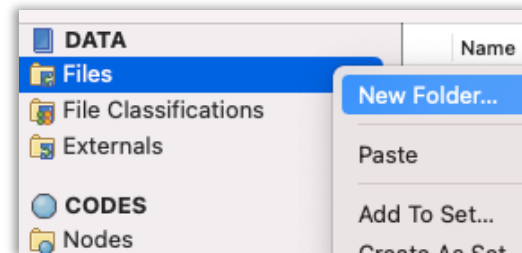
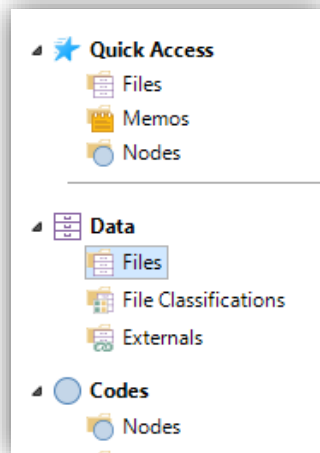


4. Right click on the **Early thoughts on coding** node in the List View
5. Select **Delete**
6. Click on **Yes** to confirm deletion

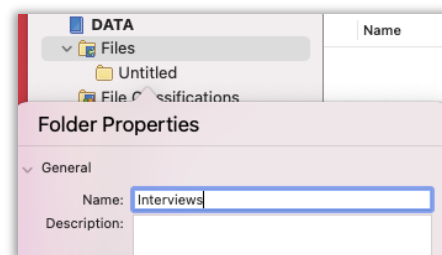
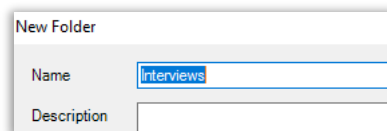


Exercise 6. *Add file structure*

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

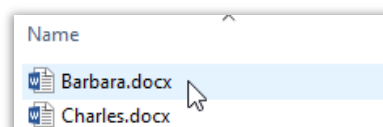
Exercise 7. *Prepare Content*



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 sessionin



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

H1 Q.1. Connection to Down East
 H2 Henry
 Interviewer Tell me about your personal and family history in Down East. How long have your family been living Down East full time or part time?
 H2 Barbara
 My family moved here when I was two years old in 1969. My parents moved down in Gloucester. But I was raised in Beaufort, in town, and we went to middle school and high school, then moved away for college. So I lived in Gloucester although I've moved away.
 H2 Henry
 Interviewer And you've lived Down East how long?
 H2 Barbara
 Since '96. My husband and I bought this little cottage.

3. Save and Close **Barbara.docx**

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

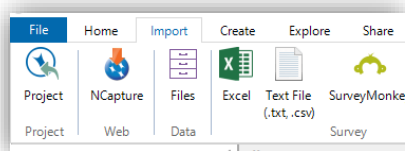
Q.1. Connection to Down East
Henry
Tell me about your personal and family history in Down East. How long have your family been living Down East full time or part time?
Barbara
 My family moved here when I was two years old in 1969. My parents moved down in Gloucester. But I was raised in Beaufort, in town, and we went to middle school and high school, then moved away for college. So I lived in Gloucester although I've moved away.
Henry
And you've lived Down East how long?

Exercise 8.

Import Content

a. Bring in a document

1. Select **Interviews** folder
2. Click the **Import** tab
3. Click the **Files** button

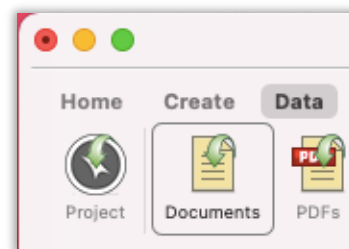


4. From the downloaded course files: Select All interviews in interviews folder
5. Click on **Open**

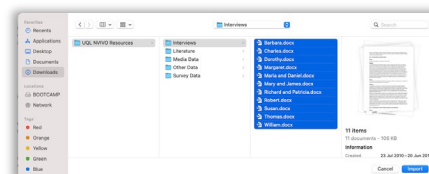
Name	Type	Size
Barbara.docx	Microsoft Word ...	17 KB
Charles.docx	Microsoft Word ...	10 KB
Dorothy.docx	Microsoft Word ...	8 KB
Margaret.docx	Microsoft Word ...	10 KB

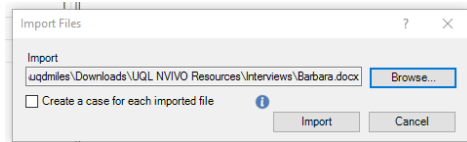
6. Click on **Import**

1. Select **Interviews** folder
2. Click the **Data** tab
3. Click the **Documents** button

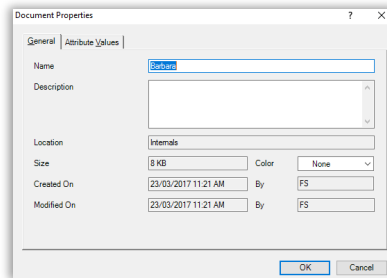


4. From the downloaded course files: Select All interviews in interviews folder
5. Click on **Import**

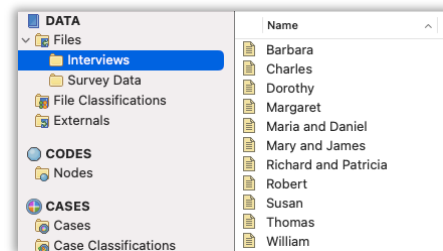
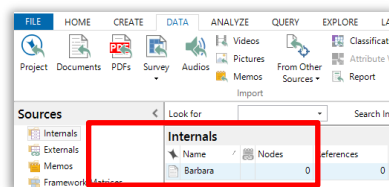




7. Click on **OK** in the Document Properties window, if required

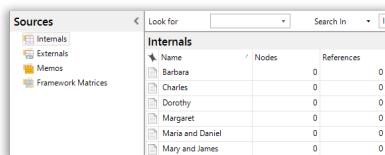


Note: Your files are added to the interviews folder



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

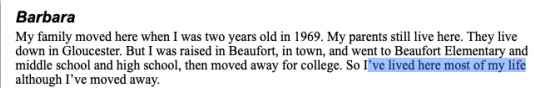
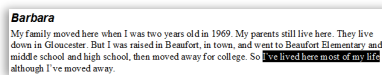
1. Organise the data into broad topics then explore your nodes for each topic and do further coding
2. Perform detailed coding as you go through sources, creating nodes as you need them and later combining or grouping nodes into related categories.

Exercise 9.

Coding to new nodes

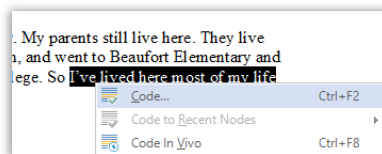
a. Code data manually

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



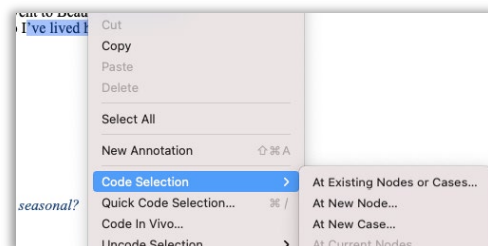
2. Highlight a line of text
3. Right click the selection
4. Select **Code**

Alternatively, Click Code on the Document tab



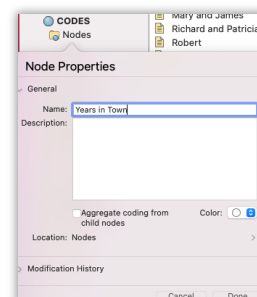
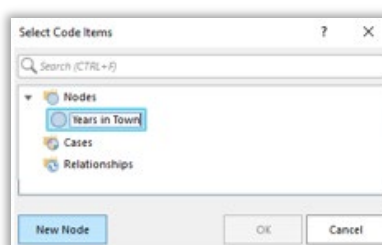
2. Highlight a line of text
3. Right click the selection
4. Select **Code Selection**

Alternatively, Click New Node or Existing Nodes on the Analyze tab

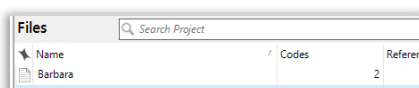


5. Click the **New Node** button
6. Enter a name for the node '**Years in Town**'
7. Click on **OK**

5. Click the **At New Node** option
6. Enter a name for the node '**Years in Town**'
7. Click on **Done**

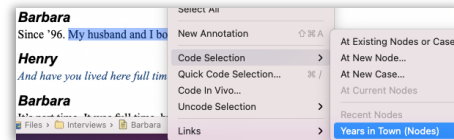
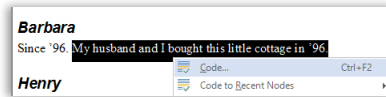


8. Check the list of Data - Files. Coding has been added to the first interview



Name	Nodes	Refer...
Barbara	1	1
Charles	0	0

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)

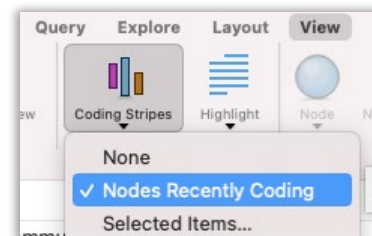
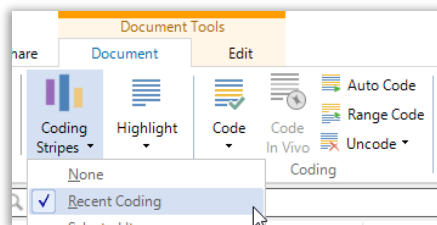


Exercise 10.

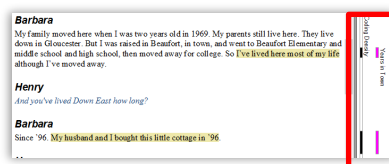
Display Coding

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**

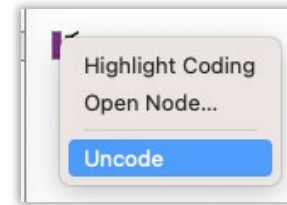
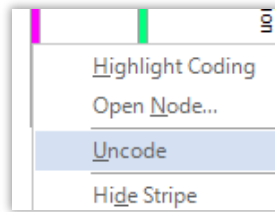


The **coding density** will display and the node will show with a bar to identify each reference. Click on the coding stripe to highlight your coding in the document



a. Remove code

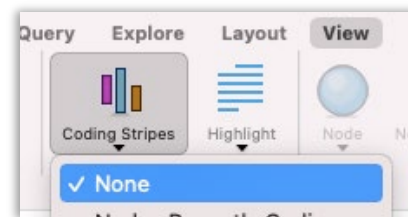
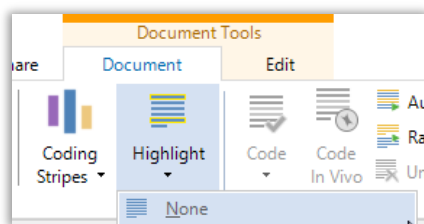
1. Right click on a coding stripe
2. Select **Uncode**



b. Remove highlight

- Go to the **Document Tools – Document** Tab
- Click on the **Highlight** button
- Select **None**

- Go to the **View** Tab
- Click on Coding Stripes
- Select **None**



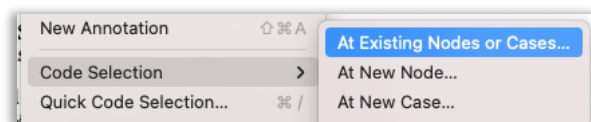
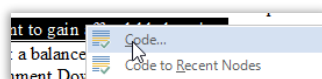
Exercise 11.

Coding to existing nodes

a. Code documents

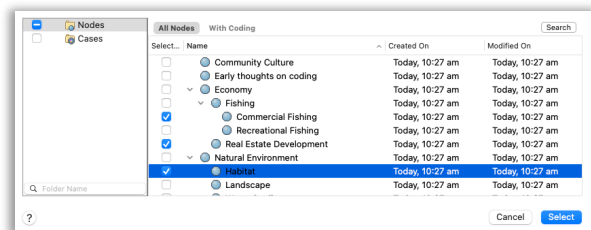
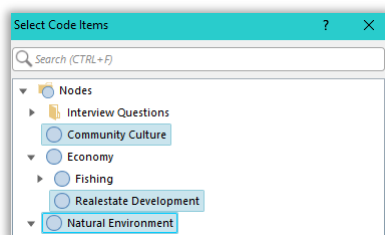
- Navigate to **Data - Files**
- Open a interview
- Select some text
- Right click on selected text
- Select **Code...**

- Navigate to **Data - Files**
- Open a interview
- Select some text
- Right click on selected text
- Select **At Existing Nodes or Cases...**



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

- Tick the box next to each node you wish to code to
- Click on **Select**



Check the Node hierarchy, coding has been added to the appropriate nodes
Repeat for other interview responses

Natural Environment	2
Habitat	2

Economy	0
> Fishing	0
Real Estate Developme...	1
Natural Environment	0
Habitat	1
Landscape	0
Water Quality	0
Years in Town	2

Exercise 12.

View Node Coding

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

Name	Sources	References
Community Culture	0	0
Economy	2	3
Fishing	3	3
Commercial Fishing	2	3
Recreational Fishing	2	2

Name	Files	Refer...	C
Community Culture	0	0	
Early thoughts on coding	0	0	
Economy	0	0	
> Fishing	2	3	
Real Estate Developme...	1	1	
Natural Environment	0	0	

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

<p>Reference 1: 0.76% Coverage</p> <p>I think the seafood industry has changed the most of anything.</p> <p>Reference 2: 0.74% Coverage</p> <p>I love the fishing business actually, and I continue to advocate for the fishing business now.</p> <p>Reference 3: 0.96% Coverage</p> <p>I would like to see some type of a co-op where all the fishermen take a fair share, and you run your own business.</p>
--

<p>Files\Interviews\Margaret</p> <p>2 references coded, 1.61% coverage</p> <p>Reference 1: 0.09% coverage</p> <p>beautiful</p> <p>Reference 2: 1.52% coverage</p> <p>ommercial fishing seminar for Carteret Catch. But I got to go fishing. We set gill nets and crab pots. And we caught some Spanish mackerel, some pretty blue fish, a shark one day. And they wer</p>
<p>Files\Interviews\Richard and Patricia</p> <p>1 reference coded, 0.29% coverage</p> <p>Reference 1: 0.29% coverage</p> <p>y all live here. Our famil</p>

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.

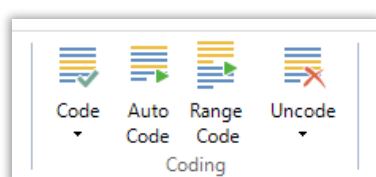
a. **Based on structure**

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

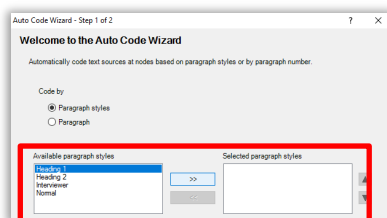
What we'd like to code are the responses to each question - In the sample data each question has the **Heading 1** style applied and we can use this to autocode.

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

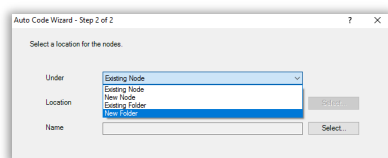
Auto Coding by paragraph styles is not available on Nvivo for Mac



5. Auto 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**

Auto Code Wizard - Step 2 of 2

Select a location for the nodes.

Under:

Location:

Name:

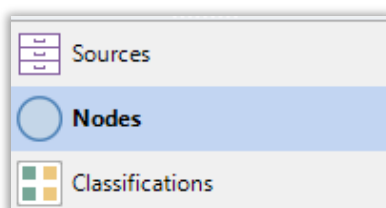
Exercise 14.

View Node References

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

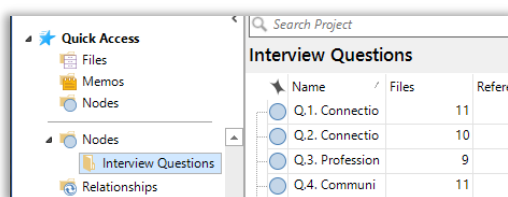
Double-click Nodes to expand if necessary

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



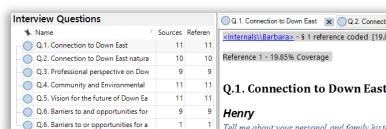
15. Click on **Interview Questions**

References will be displayed in detail view



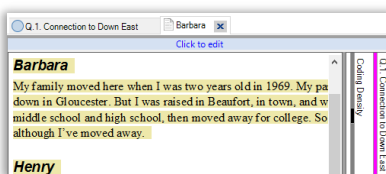
16. Double click on a question node

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

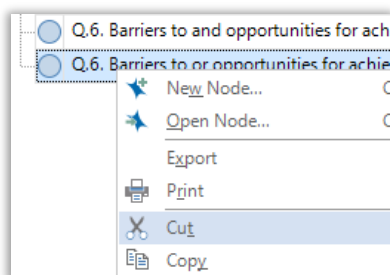


Exercise 15.

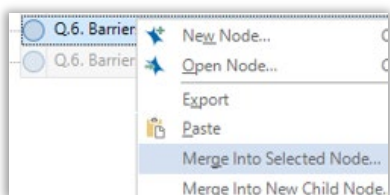
Merge Nodes

1. Right click on the last question in **Nodes/Interview Questions**
2. Select **Cut**

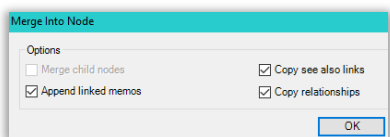
Not something that can or needs to be done on NVivo for Mac. Still related to paragraph style AutoCoding



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

Interview Questions			
Name	Sources	References	
Q.6. Barriers to and opportunities for achieving your vision	10	10	

Working with Cases

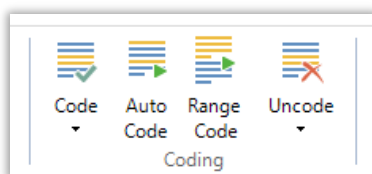
Exercise 16.

Auto coding - Cases

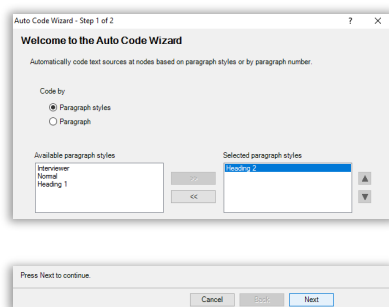
Cases are simply a different type of Node or container. Cases can help keep all data related to a given participant in one place. eg If you are doing a longitudinal study or are working with demographic data.

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



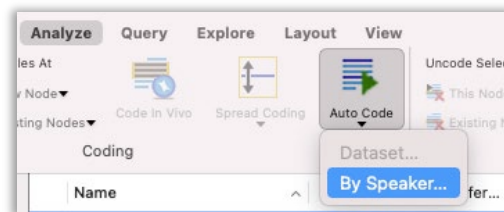
5. Click on **Heading 1**
6. Click the << arrows to transfer left
7. Click on the style to be coded - **Heading 2**
8. Click the >> arrows to transfer right
9. Click on **Next**



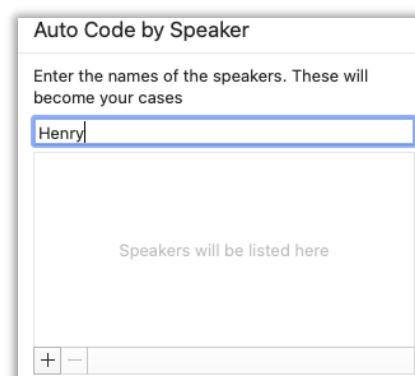
10. Click the **Under** field
11. Select **Existing Folder**
12. Click on **Select...** next to the Name field
13. Select **Cases**

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**



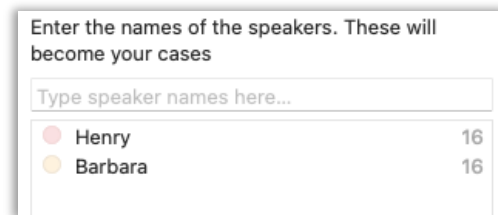
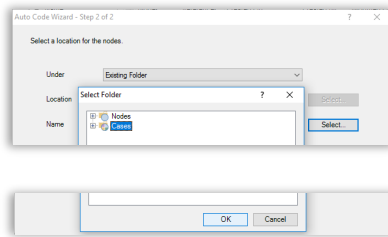
6. Auto Code Wizard will launch
7. Type in the name of a Speaker
Click the + button to add them



8. Add additional speakers as needed

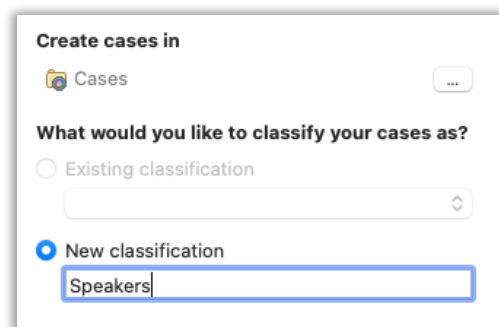
14. Click on **OK**

15. Click on **Finish**



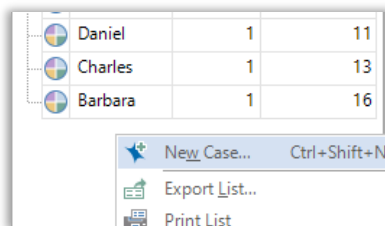
9. Add a name for a new classification in cases

10. Click **AutoCode**



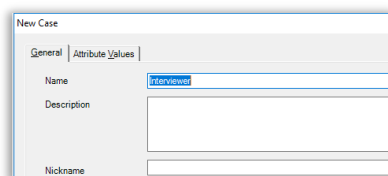
b. Case organisation - Parent Node

1. Navigate to **Cases** in the navigator
2. Right click below list of case names
3. Select **New Case**



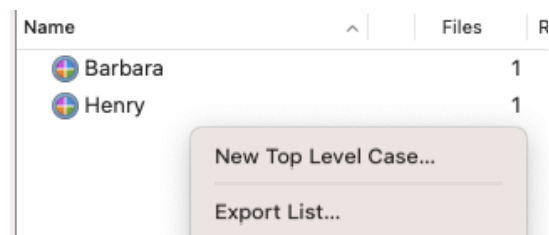
4. Add name – **Interviewer**

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



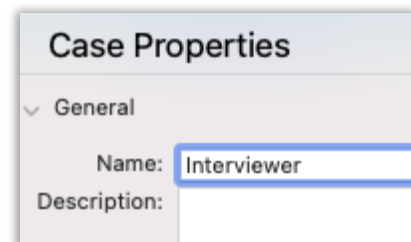
6. Click on the marker alongside **Henry**

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**

7. Drag over **Interviewer**
8. Repeat for **Nancy, Linda and Elizabeth**

Cases			
	Name	Sources	References
+	Interviewer	0	0
+	Nancy	2	18
+	Henry	7	83

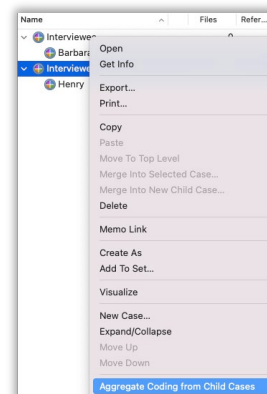
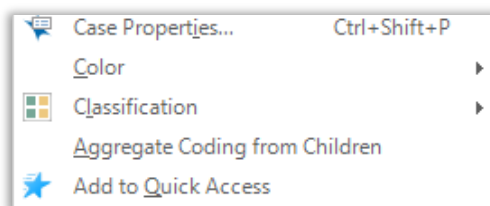
Name	
+	Barbara
+	Interviewee
+	Interviewer
+	Henry

8. Hold CTRL to select all other case names
9. Drag selection over Interviewee

Cases			
	Name	Sources	References
+	Interviewee	0	0
+	Barbara	1	16
+	Charles	1	13

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

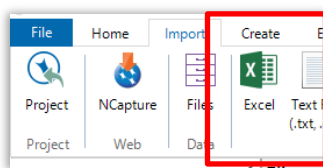


You **cannot** edit the contents of a dataset once it is imported

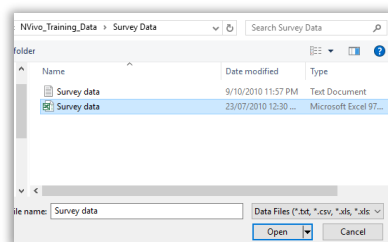
A dataset contains structured data arranged in columns and rows. One method of creating a new dataset in NVIVO is to import it from a spreadsheet, text file or database file.

a. Bring in survey data

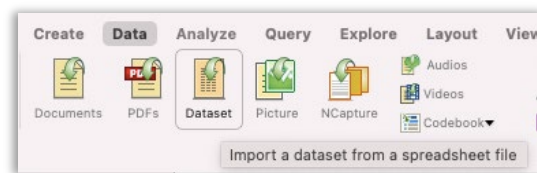
1. Navigate to **Data - Files**
2. Click the **Survey Data** folder
3. Click on the **Excel** button on the **Import** tab



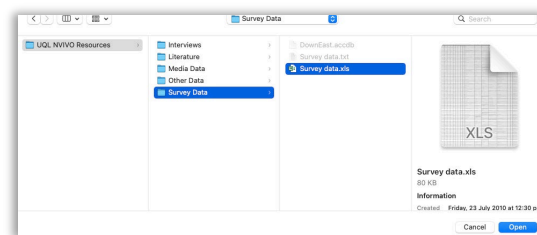
4. Select **Survey data.xlsx**
5. Click on **Open**



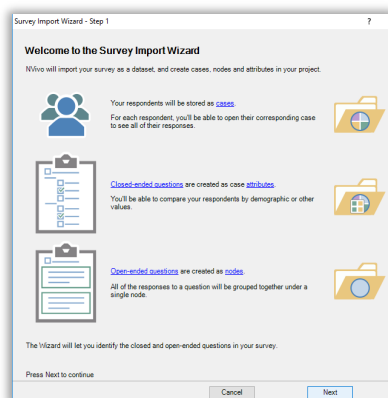
1. Navigate to **Data - Files**
2. Click the **Survey Data** folder
3. Click on the **Dataset** button on the **Data** tab



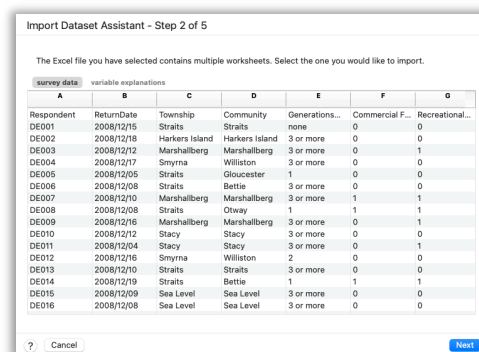
4. Select **Survey data.xlsx**
5. Click on **Open**



6. Confirm the survey wizard settings:
 - a. Respondents will be **cases**
 - b. Closed questions have **attributes**
 - c. Open questions are **nodes**
7. Click on **Next**



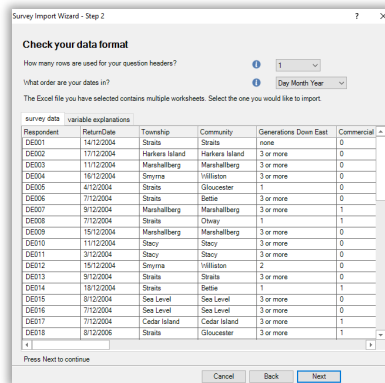
6. Confirm which sheet to import from the file. **Survey data**
7. Click on **Next**



8. Check and confirm:

- Question headers
- Date format
- The worksheet tab for data

9. Click on **Next**



Survey Import Wizard - Step 2

Check your data format

How many rows are used for your question headers?

What order are your dates in?

The Excel file you have selected contains multiple worksheets. Select the one you would like to import:

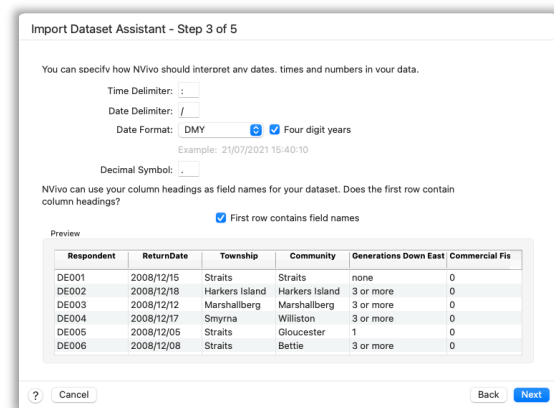
Worksheet	Variable	Explanation
DE001	ReturnDate	14/12/2004
DE002	Township	Straits
DE003	Community	Harkers Island
DE004	Generations Down East	3 or more
DE005	Commercial Fis	0
DE006	ReturnDate	11/12/2004
DE007	Township	Marshallberg
DE008	Community	Williston
DE009	Generations Down East	3 or more
DE010	Commercial Fis	0
DE011	ReturnDate	16/12/2004
DE012	Township	Smyrna
DE013	Community	Williston
DE014	Generations Down East	3 or more
DE015	Commercial Fis	0
DE016	ReturnDate	4/12/2004
DE017	Township	Straits
DE018	Community	Gloucester
DE019	Generations Down East	1
DE020	Commercial Fis	0
DE021	ReturnDate	7/12/2004
DE022	Township	Straits
DE023	Community	Bettie
DE024	Generations Down East	3 or more
DE025	Commercial Fis	0
DE026	ReturnDate	8/12/2004
DE027	Township	Marshallberg
DE028	Community	Marshallberg
DE029	Generations Down East	3 or more
DE030	Commercial Fis	0
DE031	ReturnDate	7/12/2004
DE032	Township	Stacy
DE033	Community	Stacy
DE034	Generations Down East	3 or more
DE035	Commercial Fis	0
DE036	ReturnDate	3/12/2004
DE037	Township	Stacy
DE038	Community	Stacy
DE039	Generations Down East	3 or more
DE040	Commercial Fis	0
DE041	ReturnDate	15/12/2004
DE042	Township	Smyrna
DE043	Community	Williston
DE044	Generations Down East	2
DE045	Commercial Fis	0
DE046	ReturnDate	9/12/2004
DE047	Township	Straits
DE048	Community	Straits
DE049	Generations Down East	3 or more
DE050	Commercial Fis	0
DE051	ReturnDate	18/12/2004
DE052	Township	Straits
DE053	Community	Bettie
DE054	Generations Down East	1
DE055	Commercial Fis	1
DE056	ReturnDate	8/12/2004
DE057	Township	See Level
DE058	Community	See Level
DE059	Generations Down East	3 or more
DE060	Commercial Fis	0
DE061	ReturnDate	7/12/2004
DE062	Township	See Level
DE063	Community	See Level
DE064	Generations Down East	3 or more
DE065	Commercial Fis	0
DE066	ReturnDate	7/12/2004
DE067	Township	Cedar Island
DE068	Community	Cedar Island
DE069	Generations Down East	3 or more
DE070	Commercial Fis	1
DE071	ReturnDate	8/12/2004
DE072	Township	Straits
DE073	Community	Gloucester
DE074	Generations Down East	3 or more
DE075	Commercial Fis	1

Press Next to continue

8. Check and confirm:

- Question headers
- Date format

9. Click on **Next**



Import Dataset Assistant - Step 3 of 5

You can specify how NVivo should interpret any dates, times and numbers in your data.

Time Delimiter:
 Date Delimiter:
 Date Format: ☒ Four digit years
 Example: 21/07/2021 15:40:10

Decimal Symbol:

NVivo can use your column headings as field names for your dataset. Does the first row contain column headings?

☒ First row contains field names

Preview

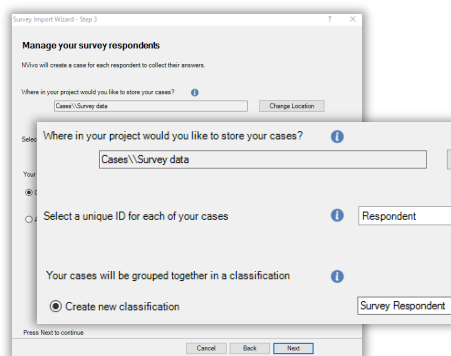
Respondent	ReturnDate	Township	Community	Generations Down East	Commercial Fis
DE001	2008/12/15	Straits	Straits	none	0
DE002	2008/12/18	Harkers Island	Harkers Island	3 or more	0
DE003	2008/12/12	Marshallberg	Marshallberg	3 or more	0
DE004	2008/12/17	Smyrna	Williston	3 or more	0
DE005	2008/12/05	Straits	Gloucester	1	0
DE006	2008/12/08	Straits	Bettie	3 or more	0

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**



Survey Import Wizard - Step 3

Manage your survey respondents

NVivo will create a case for each respondent to collect their answers.

Where in your project would you like to store your cases?

Select a unique ID for each of your cases

Your cases will be grouped together in a classification

☒ Create new classification ☐ Survey Respondent

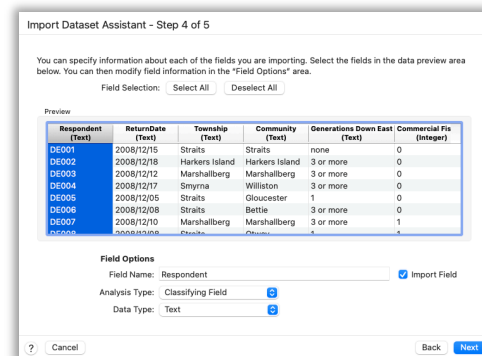
Press Next to continue

10. Identify data questions type and import status

Classifying field means it is a closed ended question.

Codeable field means it is an open ended question.

11. Click on **Next**



Import Dataset Assistant - Step 4 of 5

You can specify information about each of the fields you are importing. Select the fields in the data preview area below. You can then modify field information in the "Field Options" area.

Field Selection: ☒ Select All ☐ Deselect All

Preview

Respondent (Text)	ReturnDate (Text)	Township (Text)	Community (Text)	Generations Down East (Text)	Commercial Fis (Integer)
DE001	2008/12/15	Straits	Straits	none	0
DE002	2008/12/18	Harkers Island	Harkers Island	3 or more	0
DE003	2008/12/12	Marshallberg	Marshallberg	3 or more	0
DE004	2008/12/17	Smyrna	Williston	3 or more	0
DE005	2008/12/05	Straits	Gloucester	1	0
DE006	2008/12/08	Straits	Bettie	3 or more	0
DE007	2008/12/10	Marshallberg	Marshallberg	3 or more	1

Field Options

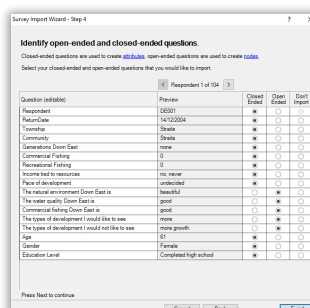
Field Name: ☒ Import Field

Analysis Type: ☒ Import Field

Data Type: ☒ Import Field

14. Identify data questions type and import status

15. Click on **Finish**



Survey Import Wizard - Step 4

Identify open-ended and closed-ended questions.

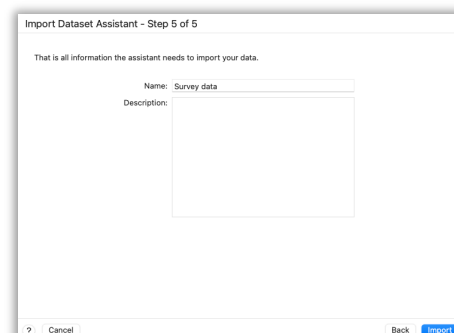
Closed-ended questions are used to create **fields**. Open-ended questions are used to create **codes**.

Select your closed-ended and open-ended questions that you would like to import:

Respondent 1 of 50

Question (editable)	Preview	Field	Code	Open	Close
Respondent	DE001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ReturnDate	14/12/2004	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Township	Straits	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community	Straits	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Generations Down East	none	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commercial Fishing	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recreational Fishing	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income tied to resources	no, never	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peace of development	unspoiled	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The natural environment Down East is	beautiful	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The water quality Down East is	good	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commercial fishing Down East is	good	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The types of development I would like to see	more	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The types of development I would not like to see	more growth	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Age	05	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gender	Female	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education Level	Completed high school	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Press Next to continue



Import Dataset Assistant - Step 5 of 5

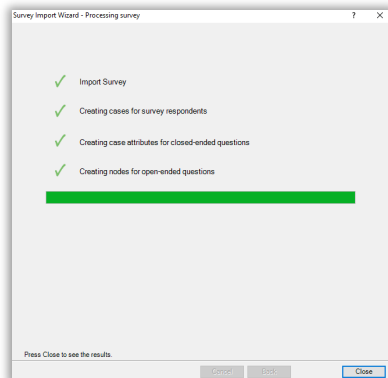
That is all information the assistant needs to import your data.

Name:

Description:

Survey import results should all be checked

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.

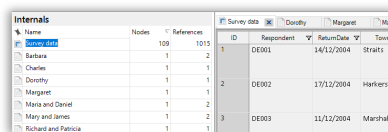
Grey shaded columns are closed ended questions(**Classifying data**)

White shaded columns are open ended responses (**Codable data**)

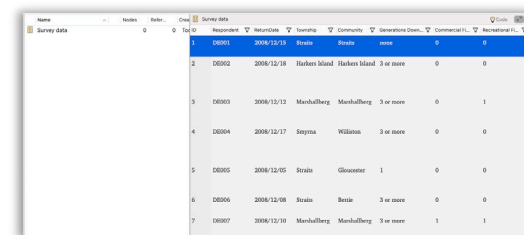
Data will display as an internal source and in list view
You cannot sort or filter by the first column. This is NVIVO's own added reference.

Grey shaded columns are closed ended questions(**Classifying data**)

White shaded columns are open ended responses (**Codable data**)



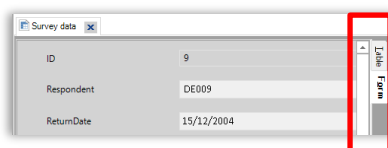
Name	Nodes	References
Survey data	109	10/15
Barbara	1	2
Charles	1	1
Dorothy	1	1
Margaret	1	1
Maria and Daniel	1	2
Mary and James	1	2
Richard and Patricia	1	1



ID	Respondent	ReturnDate	Strait	Steady	Steady	Steady	Steady	Steady
DE001	2008/12/15	Steady	Steady	Steady	Steady	Steady	Steady	Steady
DE002	2008/12/15	Steady	Steady	Steady	Steady	Steady	Steady	Steady
DE003	2008/12/15	Steady	Steady	Steady	Steady	Steady	Steady	Steady
DE004	2008/12/15	Steady	Steady	Steady	Steady	Steady	Steady	Steady
DE005	2008/12/15	Steady	Steady	Steady	Steady	Steady	Steady	Steady
DE006	2008/12/15	Steady	Steady	Steady	Steady	Steady	Steady	Steady
DE007	2008/12/15	Steady	Steady	Steady	Steady	Steady	Steady	Steady

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

17. Select the appropriate tab to change the view

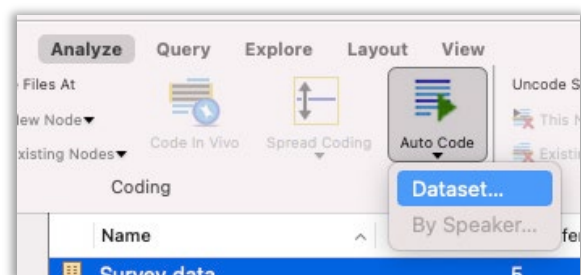


This happens automatically when importing survey data on Windows

View can't be changed on NVivo for Mac

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

15. Select **Dataset**



16. Ensure the first option is selected

17. Click **Next**

Auto Code Dataset Assistant - Step 1

Use this assistant to create and code at nodes based on the column names or row values in your dataset.

☒ Code at nodes for selected columns
For example, you could create a node for each question in a survey and code the response at each node

☐ Code at cases for each value in a column
For example, you could make a case for each respondent and code the responses at the case. You can use this option if you have a single row per respondent, or multiple rows per respondent. You can also classify these cases, assigning attribute values from the classifying columns.

Respondent	Sex	Age	Natural Environment	Water Quality	Node
DE001	male	52	Becoming poorer with pollution	Important to marine nurseries	
DE002	female	35	Pricless and vulnerable to pollution	Good for now but needs to be monitored	

Node
Coded text

? Cancel Next

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

19. Click **Next**

Auto Code Dataset Assistant - Step 2 of 3

Select the columns you would like to create as nodes

Available Columns

Selected Columns

The natural environment Do...
The water quality Down East is
Commercial fishing Down Ea...
The types of development I...
The types of development I...

Preview

Code the content using this node structure

Nodes

[NodeName]

The natural environ...
The water quality D...
Commercial fishing...
The types of develo...
The types of develo...

? Cancel Auto Code Back Next

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

21. Click **Auto Code**

Auto Code Dataset Assistant - Step 3 of 3

Select the autocoding location

Under: New Node

Location: Nodes

Name: Survey data

☐ Aggregate coding from child node

Preview

Code the content using this node structure

Nodes

[NodeName]

The natural environment
The water quality Down
Commercial fishing Down
The types of developme
The types of developme

? Cancel Back 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**

Auto Code Dataset Assistant - Step 1

Use this assistant to create and code at nodes based on the column names or row values in your dataset.

☐ Code at nodes for selected columns
For example, you could create a node for each question in a survey and code the response at each node.

☒ Code at cases for each value in a column
For example, you could make a case for each respondent and code the responses at the case. You can use this option if you have a single row per respondent, or multiple rows per respondent. You can also classify these cases, assigning attribute values from the classifying columns.

Respondent	Sex	Age	Natural Environment	Water Quality
DE001	male	52	Becoming poorer with pollution	Important to marine nurseries
DE002	female	35	Priceless and vulnerable to pollution	Good for now but needs to be monitored

Case Coded text

? Cancel Next

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

27. Click **Next**

Auto Code Dataset Assistant - Step 2 of 4

Choose the column that contains the case names

Respondent

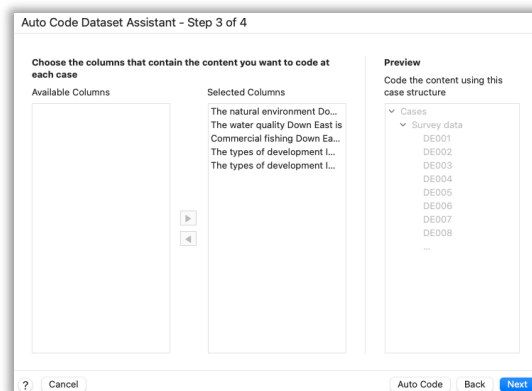
Preview

Code the content using this case structure

- Cases
 - Survey data
 - DE001
 - DE002
 - DE003
 - DE004
 - DE005
 - DE006
 - DE007
 - DE008
 - ...

? Cancel Auto Code Back Next

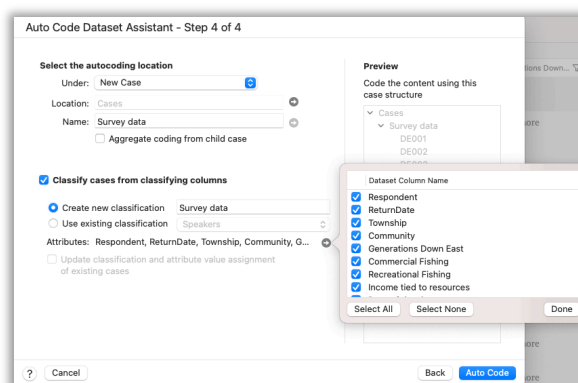
28. Click **Next**



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.

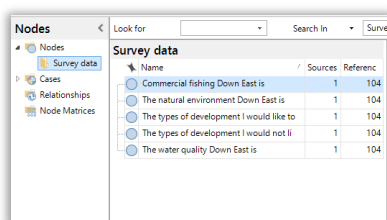
30. Click **Auto Code**



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

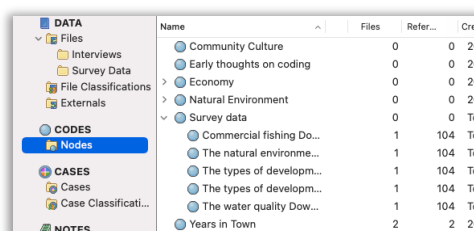


1. Click on **Nodes** in Navigation Pane

2. See **Survey Data** in Nodes

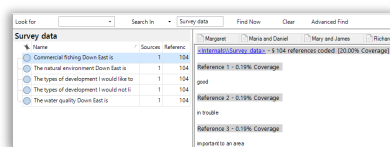
This displays the open ended questions the respondents were asked.

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



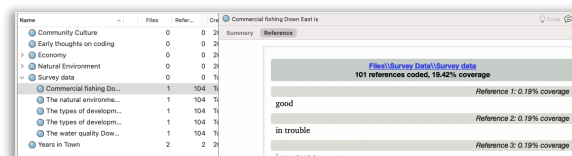
- Double click the first node to display references in **Detail** view

Remember each Node will open in a new tab



- Double click the first node to display references in **Detail** view

Remember each Node will open in a new tab



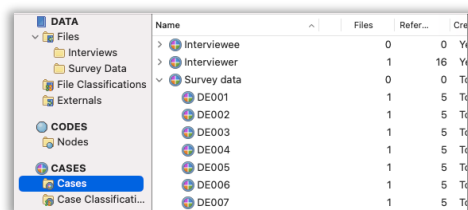
a. Viewing imported Survey Dataset - Cases

- Expand **Cases** in Navigation Pane
- Select **Survey Data** folder

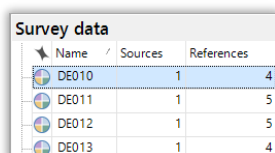
This displays each respondent as a case and the references created from their open ended responses

- Click on **Cases** in Navigation Pane
- Expand **Survey Data** in **Cases**

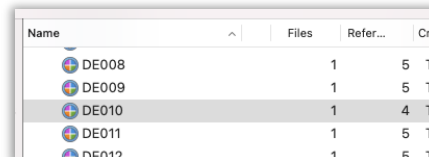
This displays each respondent as a case and the references created from their open ended responses



- Double click a case with 4 references to display references in **Detail** view



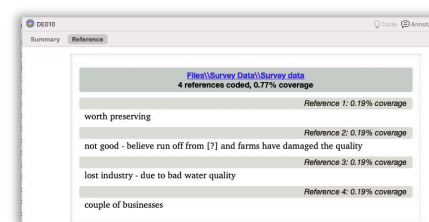
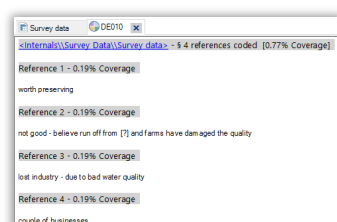
- Double click a case with 4 references to display references in **Detail** view



The references will be listed and the original can be displayed

The references will be listed and the original can be displayed

- Click the source link



- Click the **Form** tab

The responses can be viewed in detail.

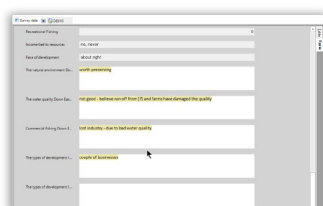


Table
Form

Querying Data

Exercise 18.

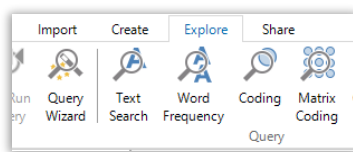
Create a Matrix Coding Query

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**.

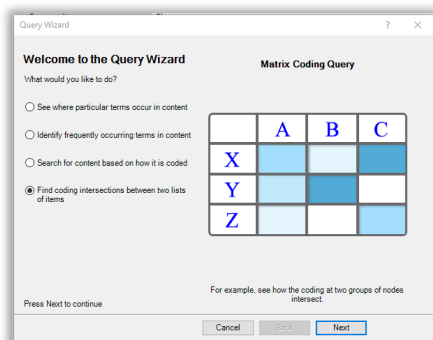
a. Matrix Query – Do different genders view development differently?

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



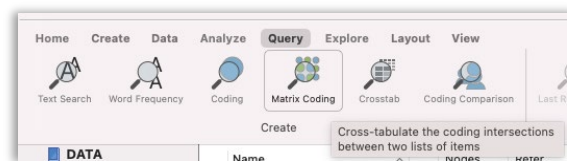
3. Choose Find coding intersections between two lists of items
4. Click next



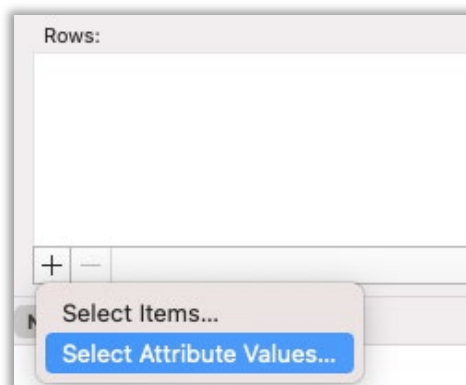
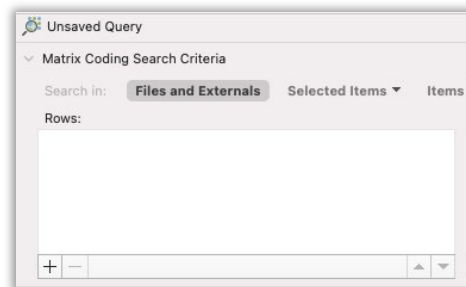
5. Click the **Add Selected Items...** button
Create a row for each gender value - *Female & Male only*

1. Click **Matrix coding** on the Query tab

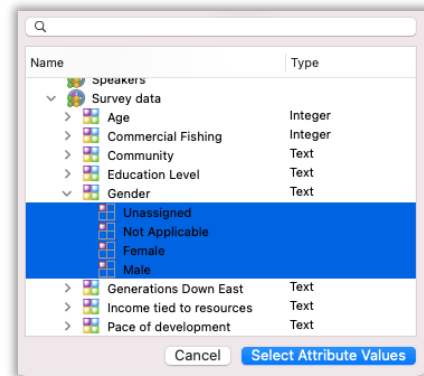
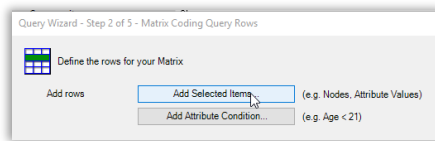
Note: on NVivo for Mac you need to create the Matrix Query without a wizard



2. Click + in the **Rows** area of the Query options
3. Click **Select Attribute Values...**

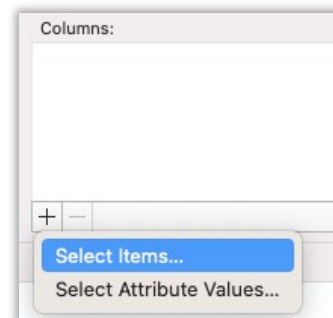
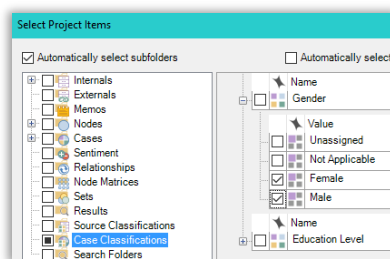


4. Expand the **Gender** field under Survey data
5. Hold shift to select all choices
6. Click **Select Attribute Values**



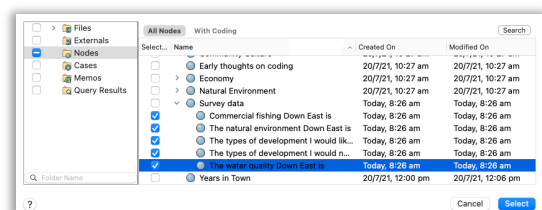
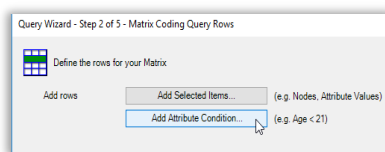
6. Click the **case classifications** text
 7. Expand Survey respondents then expand **Gender**
 8. Select **Male** and **Female**
- Case nodes represent attributes for people or places in the content

7. Click + in the **Columns** area of the Query options
8. Click **Select Items...**



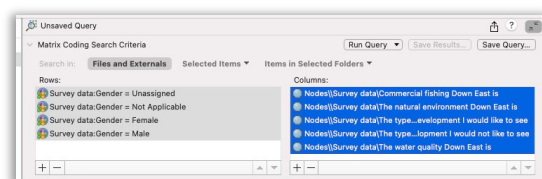
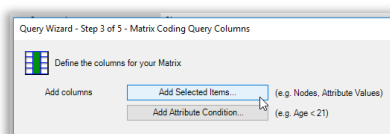
9. Click on **OK**
10. Click on the **Add Attribute Condition...** button and select an Attribute if necessary
11. Click **Next**

9. Select **Nodes**
10. Expand **Survey Data**
11. Tick all nodes in **Survey Data**
12. Click **Select**



12. Click **Add Selected Items**

13. Click **Run Query**

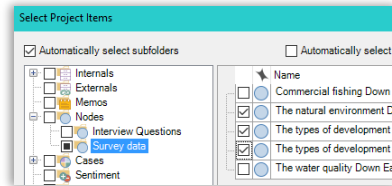


13. Select the theme nodes for the Survey Data to cross tabulate in your matrix.

Theme nodes represent coded text in the content
Nodes > Survey Data > *Select three questions*

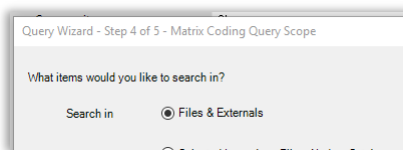
14. Click on **OK**

15. Click **Next**



16. Search in: **Files & Externals**

17. Click **Next**



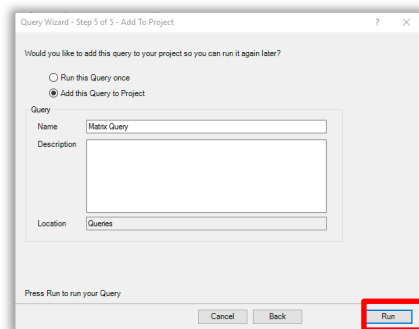
18. Select Add this Query to Project

19. Select Name and enter name e.g. Matrix Query practice

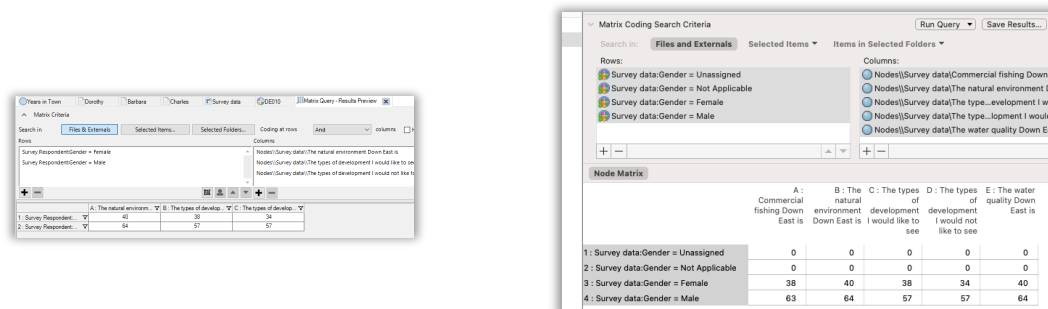
20. Enter Optional Description if you wish

21. Click on **Run**

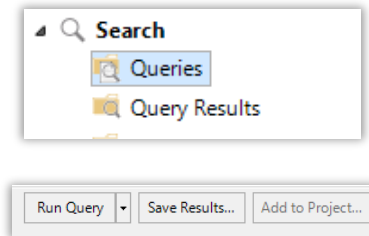
If you click **OK** you don't actually query the data.



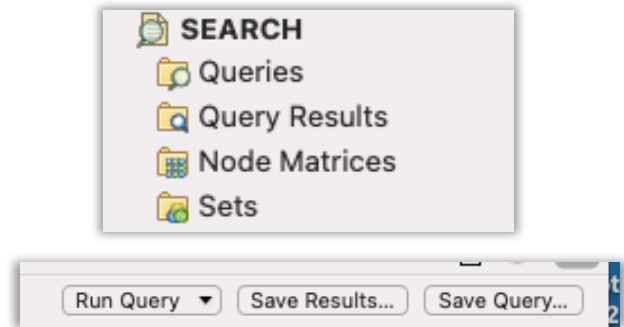
The query results are displayed in the Matrix Query – Results Preview tab in the Details view



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)

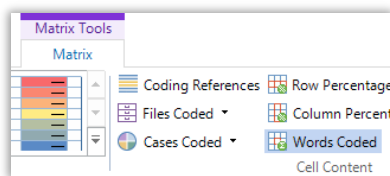


13. You can save the query in order to run at a later time click Save Query...
14. To save the results of the query use Save Results...



b. Viewing and amending matrix results

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

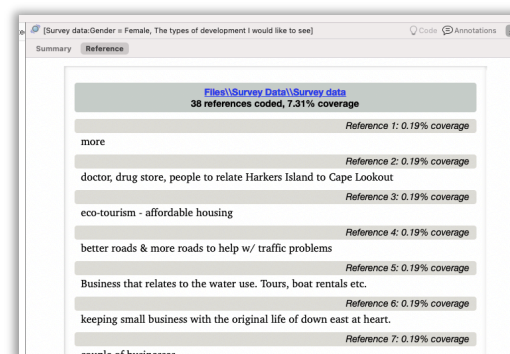
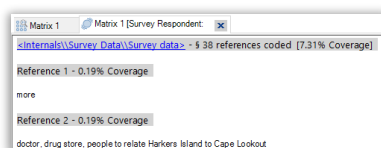


NVivo for Mac can only show Coding references for Matrix results

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

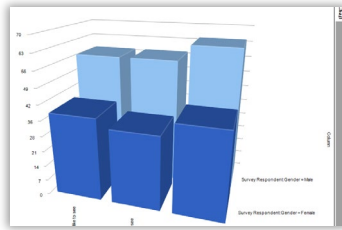
	A: The natural environ...	B: The types of develop...	C: The types of develop...
1: Survey Respondent...	293	266	230
2: Survey Respondent...	412	396	392

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

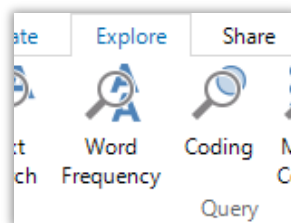


Exercise 19.

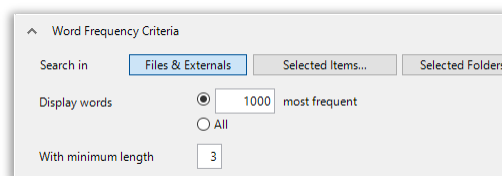
'Word Frequency' Query

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



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

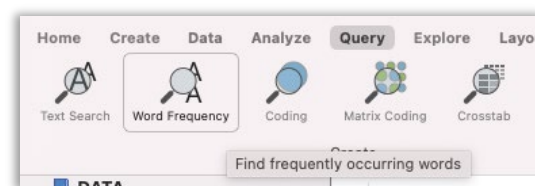
5. Click on **Add to Project** for future use

Word	Length	Count	Weighted Percentage (%)
people	6	153	1.62
east	4	148	1.57
think	5	123	1.31

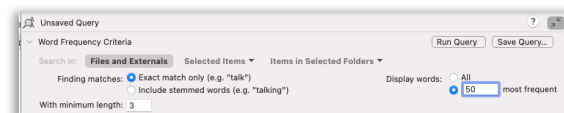
a. Exclude words in query

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**

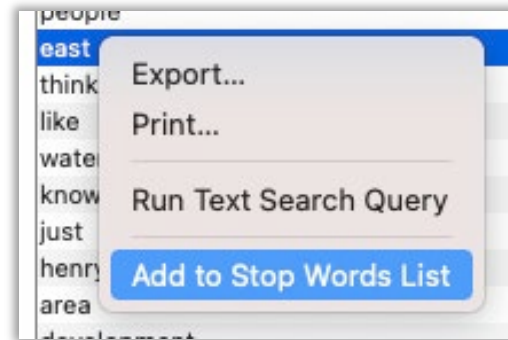


The results will be displayed. Nvivo has a built in filter to avoid filler words like it, is and that.

5. Click on **Save Query...** for future use

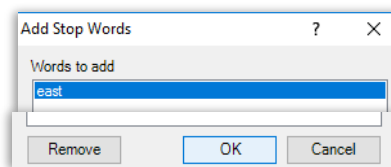
Word	Length	Count	Weighted Percentage (%)
people	6	167	1.46%
east	4	160	1.40%
think	5	123	1.08%
like	4	117	1.02%
water	5	112	0.98%

Word	Length	Count
people	6	153
east	4	118
think	5	125
like	4	118
know	5	125
water	6	118
just	4	118
henry	6	118



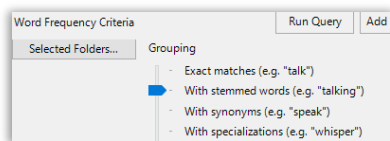
3. Click on **OK**
4. Re-run the query

3. Re-run the query

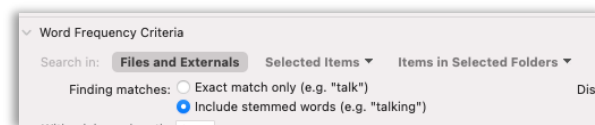


b. Automatic word grouping

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



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



2. Re-run the query

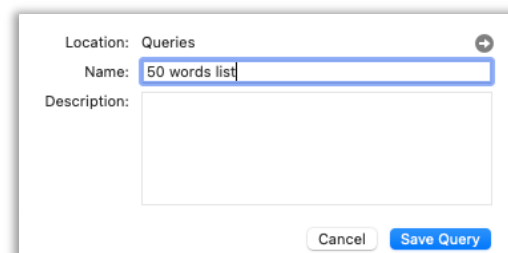
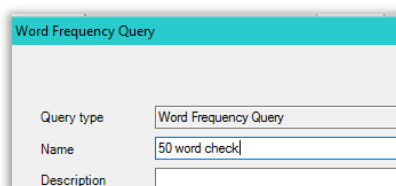
Word	Length	Count	Weighted Percentage (%)	Similar Words
people	6	167	1.48	people
think	5	125	1.11	think, thinking
developments	12	123	1.09	develop, developable, developed
fishing	7	121	1.07	fish, fished, fishes, fishing
like	4	118	1.05	like, liked

Word	Length	Count	Weighted Percentage	Similar Words
people	6	167	1.48%	people
think	5	125	1.11%	think, thinking
developments	12	123	1.09%	develop, developable, developed, developer
fishing	7	121	1.07%	fish, fished, fishes, fishing
like	4	118	1.05%	like, liked
waters	6	118	1.05%	water, waters

c. Add query to project for reuse

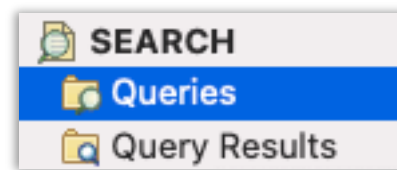
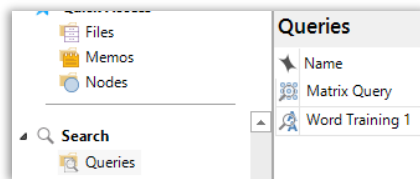
1. Click the **Add to project** button
2. Enter a name for the query
3. Click on **OK**

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



4. Navigate to **Search - Queries** and view saved project queries

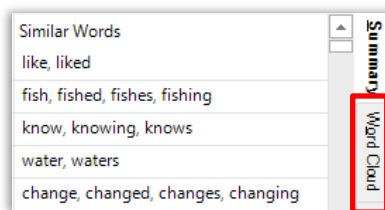
This is not the results, only the query settings



Exercise 20.

Create a Word Query

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



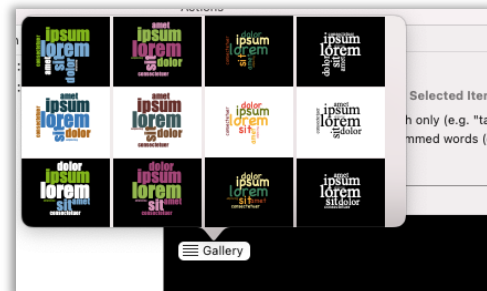
1. Click on the **Word Cloud** tab, nex to **Summary**, at the top of the results list



2. Go to the **Word Frequency Query** tab
3. Select an alternative design

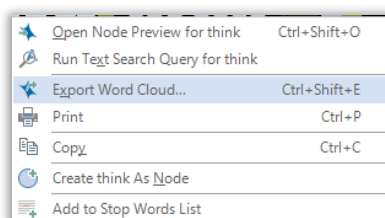


2. Click the **Gallery** button
3. Select an alternative design



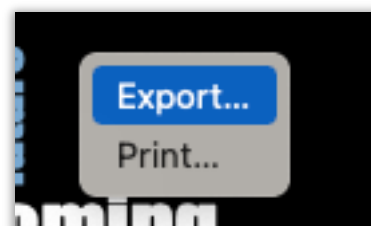
4. Right click on **Word Cloud**
5. Select **Export Word Cloud**
6. Enter a **filename**
7. Click on **Save**

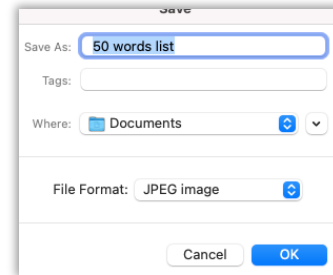
You will have a static image of the word cloud generated from your text query



4. Right click on **Word Cloud**
5. Select **Export...**
6. Enter a **filename**
7. Select file type
8. Click on **Ok**

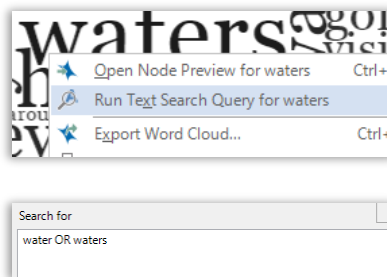
You will have a static image of the word cloud generated from your text query





a. Single word query

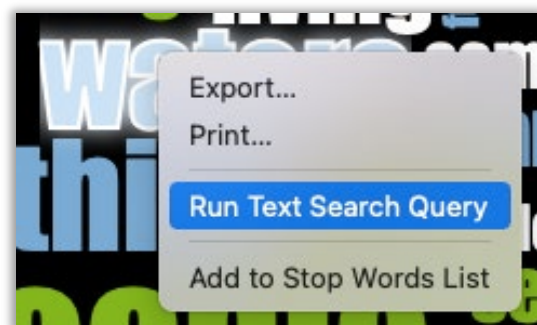
1. In the word cloud, right click on the word "Waters"
2. Select **Run Text Search Query for waters**



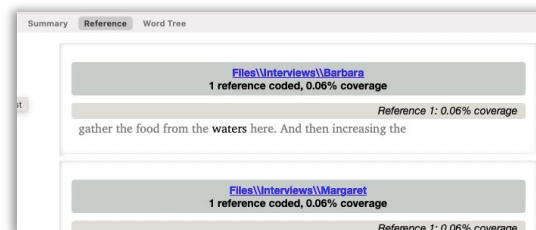
3. Click on the **Reference** tab to see waters with more context
4. Click on the **Word Tree** tab.

Name	In Folder	References	Coverage	Summary
Barbara	Internals	15	0.67%	
Charles	Internals	8	0.36%	
Dorothy	Internals	9	0.55%	
Margaret	Internals	8	0.32%	
Maria and Daniel	Internals	7	0.39%	
Mary and James	Internals	17	0.72%	
Richard and Patricia	Internals	7	0.41%	
Robert	Internals	5	0.22%	
Susan	Internals	11	0.47%	

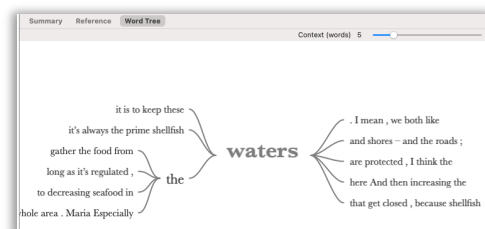
1. In the word cloud, right click on the word "Waters"
2. Select **Run Text Search Query**



3. Click on the **Reference** tab to see waters with more context
4. Click on the **Word Tree** tab.



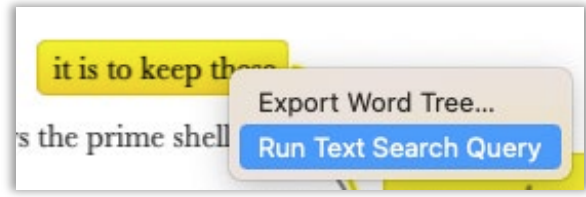
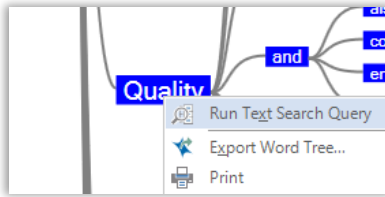
The word tree groups together words which appear frequently before and after the word water



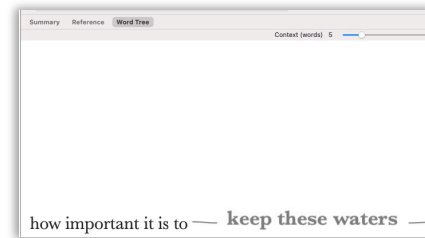
b. Word tree query

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

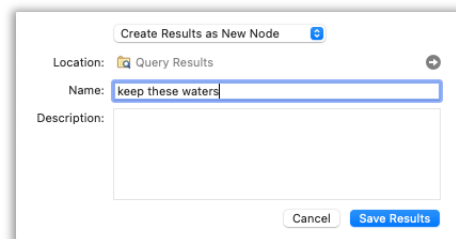
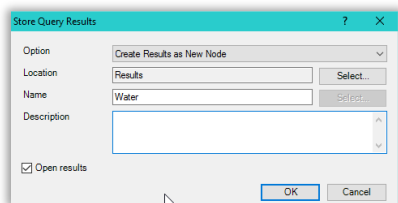
1. In the Word tree, right click on the words "it is to keep these"
2. Select **Run Text Search Query**



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

Visualisation Tools

Exercise 21.

Diagrams

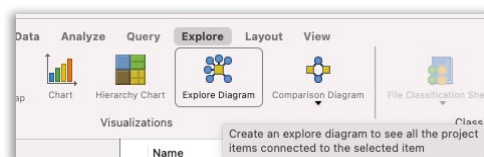
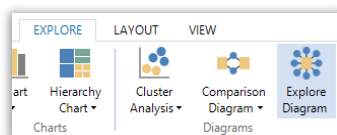
a. Explore diagram

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

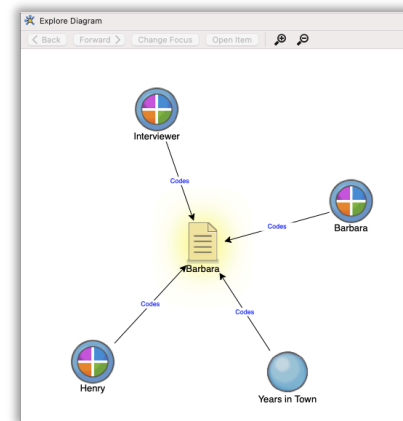
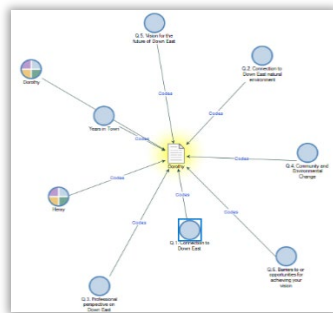
Name	Nodes	Reference
Barbara	9	
Charles	9	
Dorothy	9	

Name	Nodes	Refer...
Barbara	4	
Charles	1	
Dorothy	0	
Margaret	4	

2. Click **Explore Diagram** on the Explore tab



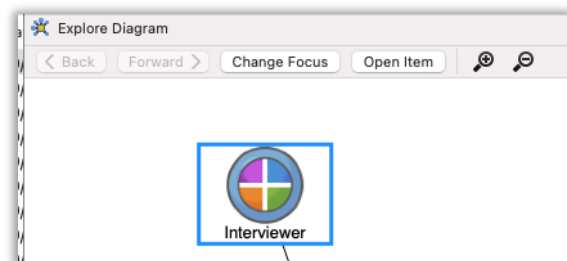
The diagram appears in details view



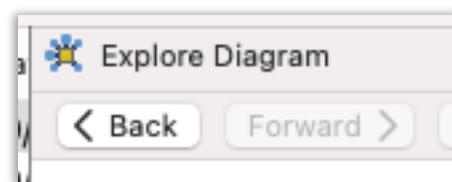
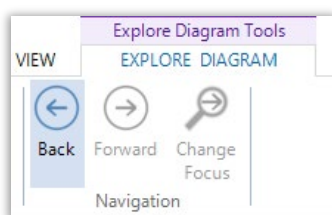
3. Click on a surrounding item
4. Click the **Change Focus** button on the Explore Diagram tab

Use the ribbon to see more connections

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



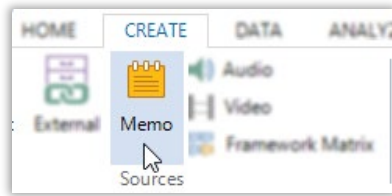
5. Click the **back** button to navigate through the diagram
6. Double click any item to view its content



7. An explore diagram is NOT stored as part of a project. To save the diagram

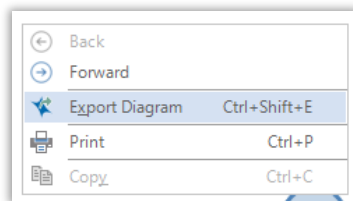
- Copy and paste into a memo
 - a. Click and drag across image to select all elements
 - b. Copy: *ctrl C*
 - c. Click **Memo** on Create tab
 - d. Add a new memo name
 - e. Click **OK**
 - f. Paste: *ctrl V*

Cannot copy diagram content into a memo on NVivo for Mac



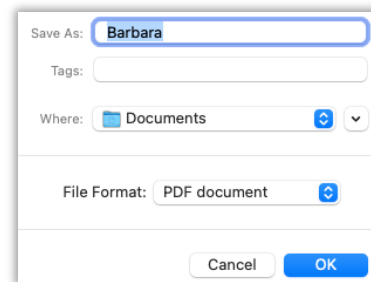
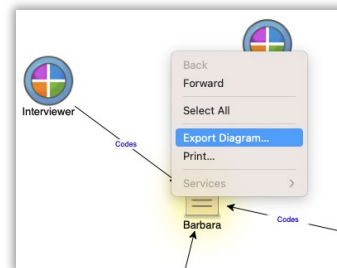
- Export as an image

- Right click on diagram
- Select **Export Diagram**
- Navigate to a location
- Click on **Save**



- Export as an image

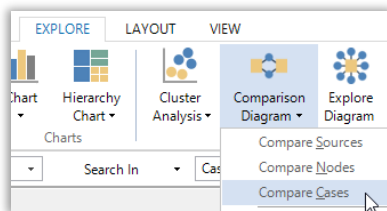
- Right click on diagram
- Select **Export Diagram**
- Navigate to a location
- Pick a file type
- Click on **Save**



b. Comparison diagram

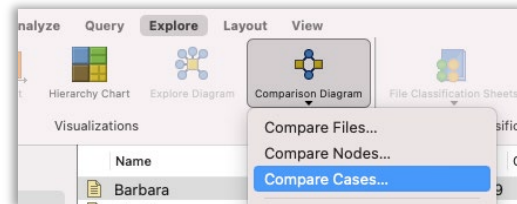
A comparison diagram lets you compare two of the same type of project items, sources, nodes or cases. The comparison indicates the similarities and differences between items.

- Click **Comparison Diagram** on the **Explore** tab
- Select **Compare Cases**



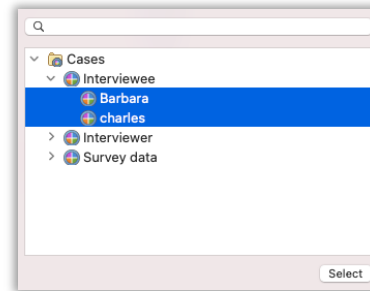
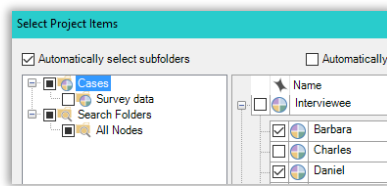
- Select 2 interview participants
- Click on OK

The comparison diagram opens in detail view



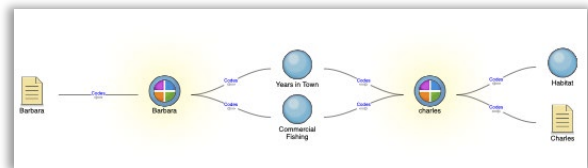
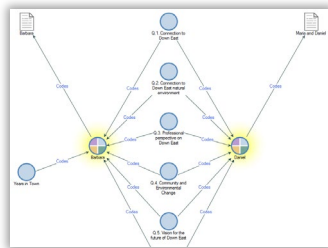
- Select 2 interview participants
- Click on **Select**

The comparison diagram opens in detail view



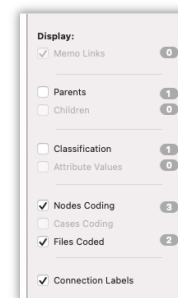
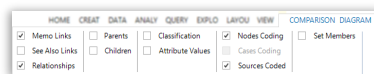
Everything items have in common is in the centre of the diagram. Links to item differences are shown either side of the diagram

3. Double Click any item to open and view content



Use the tools on the Ribbon to show links you are interested in.

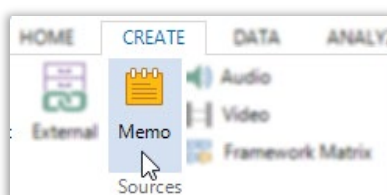
Use the options on the sidebar to show links you are interested in.



5. An comparison diagram is NOT stored as part of a project. To save the diagram

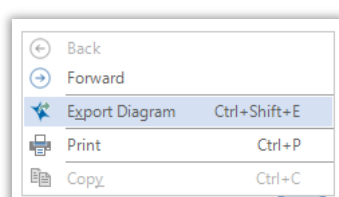
- Copy and paste into a memo
- or

Cannot copy content to Memo on NVivo for Mac



- Export as an image

(See previous exercise)



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.

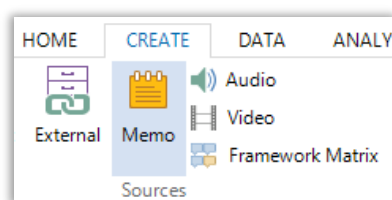
Annotations in NVIVO are like notes in the margin

See Also Links can be used as cross references between related items in your project

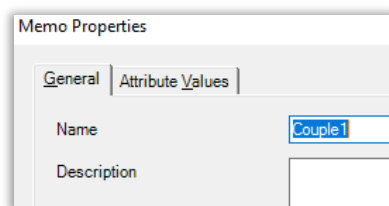
Exercise 22.

Create a Memo

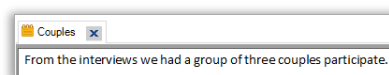
1. Click on **Memo** on the **Create** Tab



2. Enter a **Name** – Couple1
3. Click on **OK**

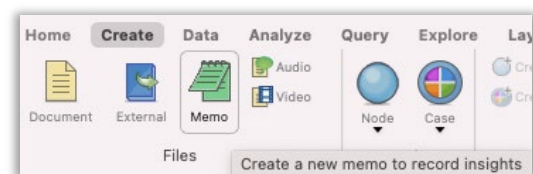
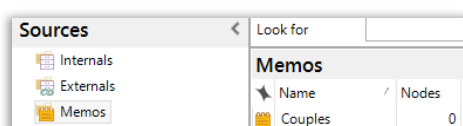


4. Enter any notes relating to your source
 5. Click Close cross on memo tab.
- NVivo will automatically save whatever you type.

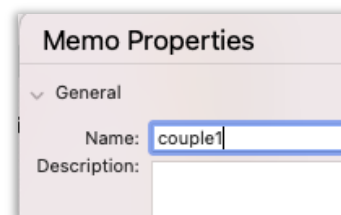


6. Go to **Memos** in Sources

The new memo will be displayed in list view

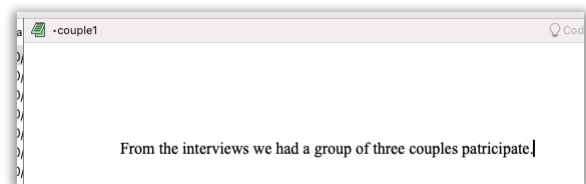


2. Enter a **Name** – Couple1
3. Click on **Done**



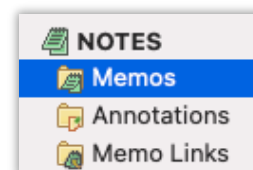
4. Enter any notes relating to your source
5. Click Close cross on **Open Items** window in bottom left.

NVivo will automatically save whatever you type.



6. Go to **Memos** in Notes

The new memo will be displayed in list view



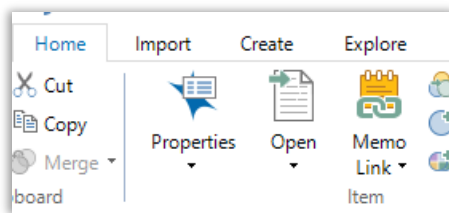
Exercise 23.

Link a Memo

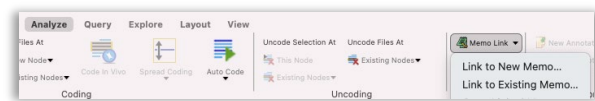
To link memos to a source item, go to the source item first.

Memos can only be linked to a **single** source item. Anything already linked will be unavailable

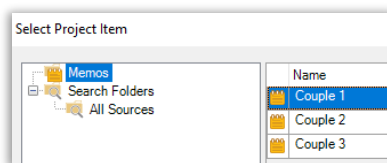
1. Go to **Data - Files**
2. Click on **Maria and Daniel** in interviews
3. Click the **Home** tab
4. Click the **Memo Link** button
5. Select **Link to Existing Memo**



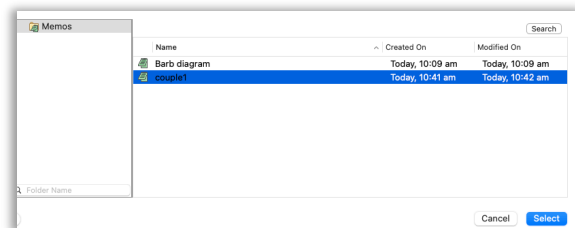
1. Go to **Data - Files**
2. Click on **Maria and Daniel** in interviews
3. Click the **Analyze** tab
4. Click the **Memo Link** button
5. Select **Link to Existing Memo**



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

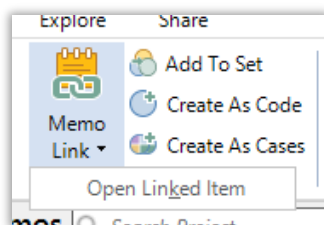


6. Select the **Couple1** memo.
7. Click on **Select**

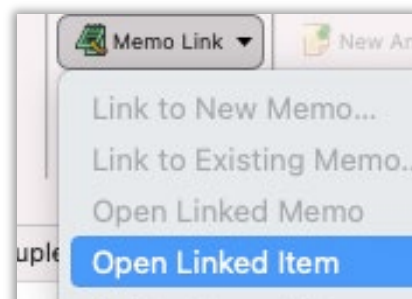


a. View memo or linked item

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.

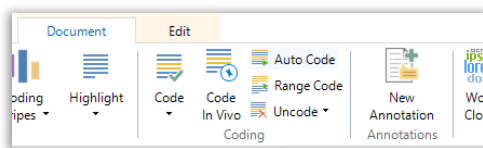
Annotations

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

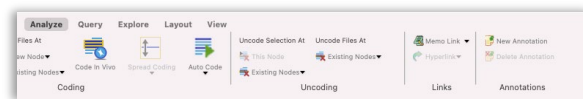
5. Open a Data - File interview
6. Select text to annotate
7. Go to the **Document** Tab
8. Click the **New Annotation** button

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

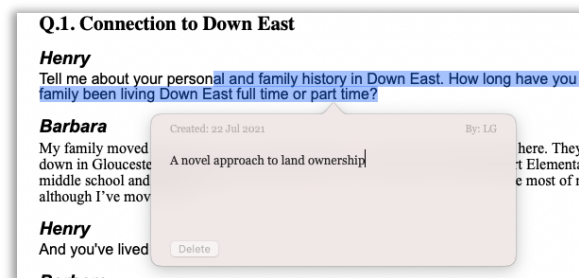
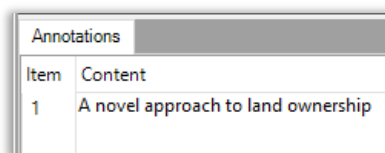


1. Open a Data - File interview
2. Select text to annotate
3. Go to the **Analyze** Tab
4. Click the **New Annotation** button

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

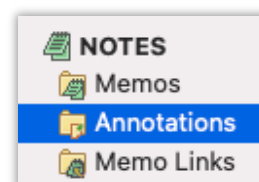
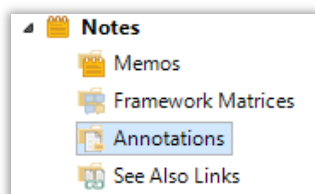


5. Start typing your annotation
 6. Click into the source content when complete
- Annotated text is highlighted in blue

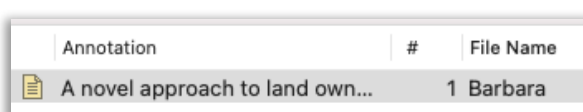
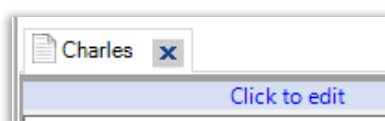


b. Edit annotations

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**



4. *In Nodes*: Double click to open a node

All nodes connected to sources will be visible and annotation editing is activated automatically

Edit as needed

Annotations	
Item	Content
1	Commercial fishing

Exercise 25.

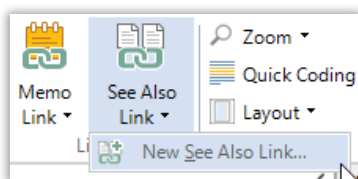
Adding a “see also” link

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.

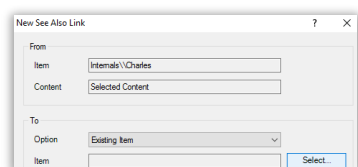
a. Link to an existing source

1. Select text to link from
2. Click **Document** tab - **See Also Link**
3. Click **New See Also Link...**

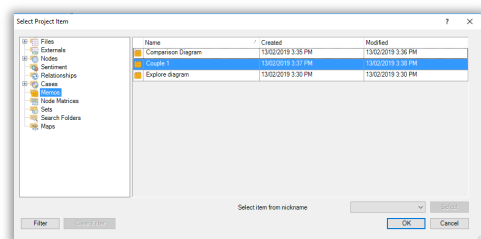
See also linking is not available on NVivo for Mac



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

Elizabeth

You said you just moved to Down East?

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

