

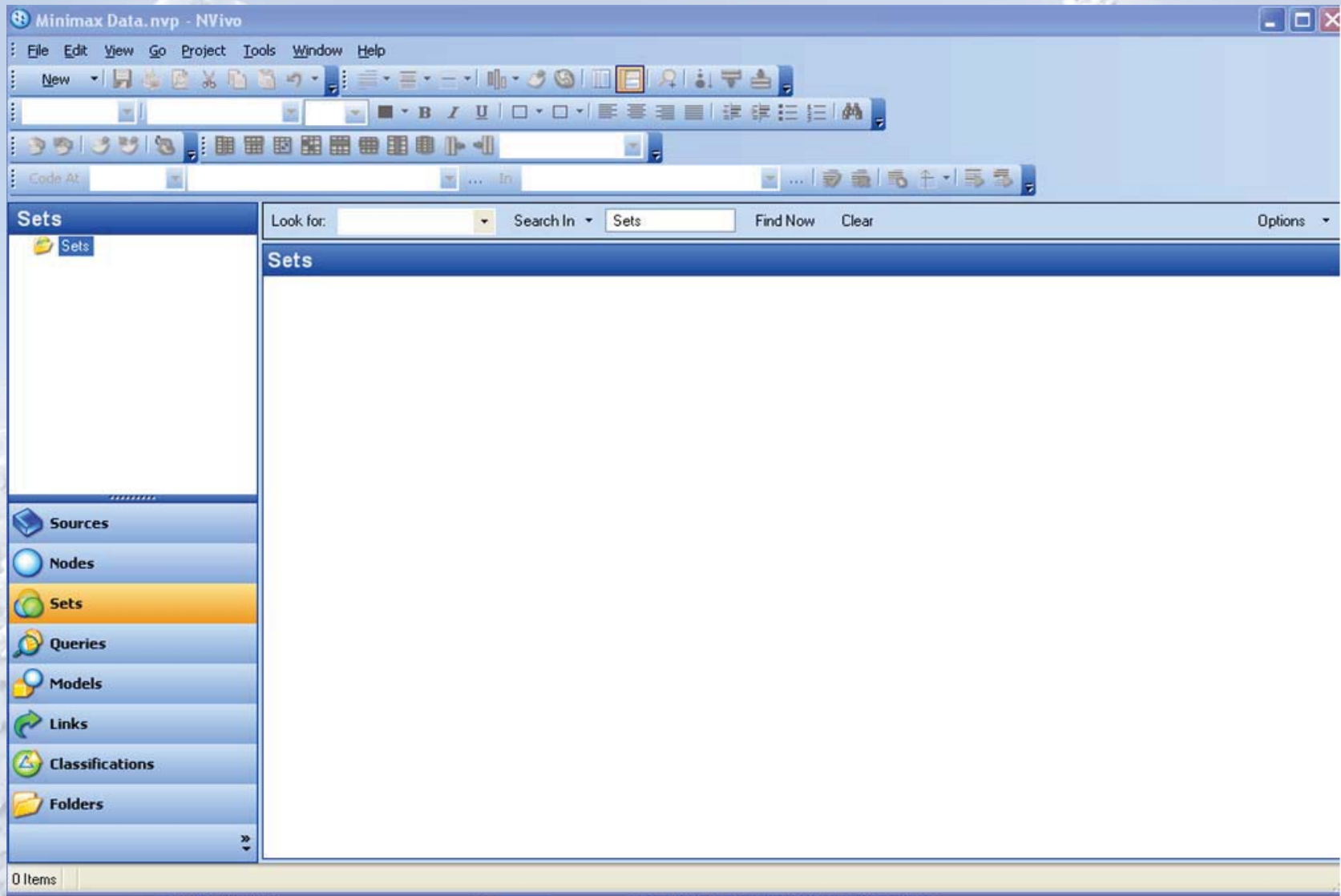
# Precision Consulting

228 PARK AVENUE SOUTH  
NEW YORK, NY 10003-1502  
PHONE: 646-553-4730  
FAX: 646-304-9595

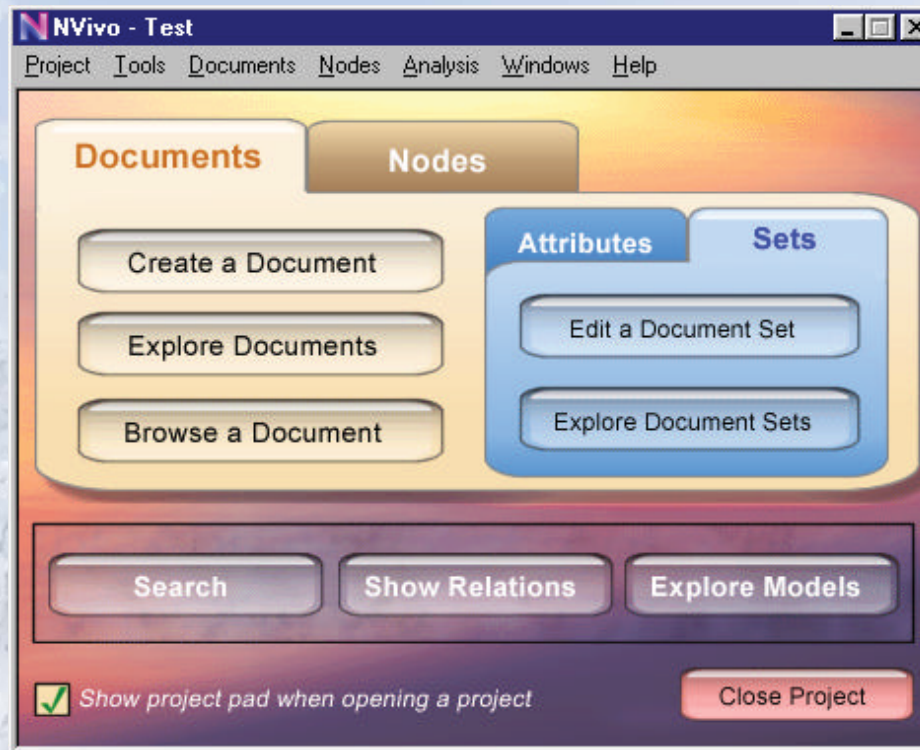
## How to Use Nvivo A Comprehensive Tool



# Overview of User Interface



# Basic Project Pad



# Creating a Project

To create a new project:

1. Click the **QSR Nvivo** icon on your desktop to open the application. On first launch, the **NVivo User** dialog box is displayed.



2. By default, your Windows user name is displayed in the **Name** field. You can update the name if required. If you are sharing this Windows login with another user, enter your own name.

3. In the **Initials** field, enter your initials. Click **OK**.

4. On the **Welcome** screen, click the **New Project** button.

# Creating a Project

4. The **New Project** dialog box is displayed.
5. Enter a name for your project in the **Title** field.
6. If required, enter a description of your project in the **Description** field. For example, this might include information about the objectives of your research project.
7. To change the location of the project, click the **Browse** button.
8. Click **OK**. The **NVivo** window is displayed with the name of your project in the Title bar and your user initials in the Status bar.

# 5 Types of Nodes

1. **Free Nodes** (no hierarchy)

## 2. **Tree Nodes**

Parent Nodes (general categories)








Child Nodes (specific sub-categories)

3. **Cases** (for demographic information)

4. **Relationships** (nodes that describe the connection between two project items)

5. **Matrices** (a collection of nodes resulting from a matrix coding query.)

## Nodes

-  Free Nodes
-  Tree Nodes
-  Cases
-  Relationships
-  Matrices
-  Search Folders
-  All Nodes

# 3 Types of Views

## **Navigation View:**

On the left side of the screen, you can navigate your way around your sources.

## **List View:**

On the top portion of the workspace screen, the list view allows you to see a list of the contents of the sources you click on in navigation view.

## **Detail View:**

This makes up the center of the screen, extending to the lower right-hand corner. This is where you see the content of your sources, and is where the coding takes place. In detail view, you can open multiple tabs of different sources. The tabs are in the top left hand of the detail view screen.

# Useful Terms

## **Sets:**

Sets provide a flexible way of grouping project items of different types. For example, you might create a set for the photographs and videos taken in a particular setting. You can customize the order of the items in a set to make a virtual 'album' or photo gallery.

## **Queries:**

Queries enable you to question your data, find patterns and pursue ideas. You can save queries, re-run them through new data and track the evolution of results.

## **Models:**

Models can illustrate initial ideas about your project or identify emerging patterns and connections. Make a 'static' model to represent your project at a specific point in time. Make a 'dynamic' model to represent your project in real time.

## **Links:**

NVivo provides the following ways to link your data:



# More Useful Terms

## **Memo Links:**

Use 'memo links' to attach a memo to the source or node that is related to it.

## **See Also Links:**

Use 'see also' links to place pointers between the content of sources, nodes, models or sets.

## **Annotations:**

Like scribbled notes in a margin, annotations enable you to comment on selected content.

## **Classifications:**

- a) **Cases** by setting up attributes such as gender, age and location.
- b) **Relationships** by setting up relationship types (*loves, impacts, employs, is married to* and so on).

# Sources

In NVivo, 'sources' is the collective term for your research materials—anything from handwritten diaries to video recordings of group discussions. After creating a project, you can gather your research data in the following ways:

## **Import Internals**

These are your *primary sources* that may include:

### **Documents**

in text (.txt), rich text (.rtf), portable document format (.pdf) or Word (.doc) format. For example, interview transcripts, emails, literature reviews and so on. You can also create documents directly in NVivo, refer to the help for more information.

### **Create Externals**

for files that you cannot import—handwritten diaries, books, PowerPoint presentations and so on.

# More Sources

**Video** recordings in .mpg, .mpeg, .mpe, .wmv, .avi, .mov, .qt or .mp4 format. This might include video recordings of interviews or research settings, media clips and so on.

**Audio** recordings in .mp3, .wma or .wav format. This might include audio interviews, podcasts, music or whatever audio material is relevant to your research.

**Pictures** that are in .bmp, .gif, .jpg, .jpeg, .tif or .tiff format. For example, you might have photos that are used to elicit responses from research participants or photos taken by the participants themselves.

# Simple Coding

- Coding allows you to gather together all the material related to a topic. When you open the node, you can see all the references gathered there.
- NVivo also provides advanced coding methods. You can run a text search query to find all occurrences of a word and then code these occurrences at a node—for example, you could search for all occurrences of the word ‘fun’ and code these at the node *Enjoyment*.
- If you are dealing with structured information such as survey responses, you can use NVivo’s auto code functions to code by paragraph, paragraph style or transcript field.

# Coding in a Document

To code document content—simply drag and drop:

1. Open the document you want to code—it is displayed in **Detail View**.
2. Open the required node folder to display the nodes in **List View**.
3. If required, re-arrange the views for easy coding—on the **View** menu, click **Detail View>Right**.
4. Select the content you want to code and drag it to the required node. To code at a new node:
  - a. On the **Coding** toolbar, select the **Name** option from the **Code At** drop-down list.
  - b. Enter a name for the new node in the next drop-down list.
  - c. From the **In** drop-down list, select the location for the node.
  - d. Click the **Code** button.

The content is coded at the node. If you open the node (by double-clicking on it), you can see coded content.

# Coding an Audio or Video Source

1. To code the content of an audio or video source:
2. Open the audio or video source you want to code—it is displayed in **Detail View**.
3. Open the required node folder to display the nodes in **List View**.
4. To code directly on the audio or video, select a portion of the timeline and drag and drop it on the required node.
5. To code text in the transcript, select a row and drag and drop it on the required node. You can also select specific text in the **Content** column and right-click to code at a node.

# Exploring a Node

To open a node and see all the references that have been coded there:

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

2. Click the required node type.

3. In **List View**, double-click the required node.

4. The node is opened in **Detail View** with the **Reference** tab displayed.

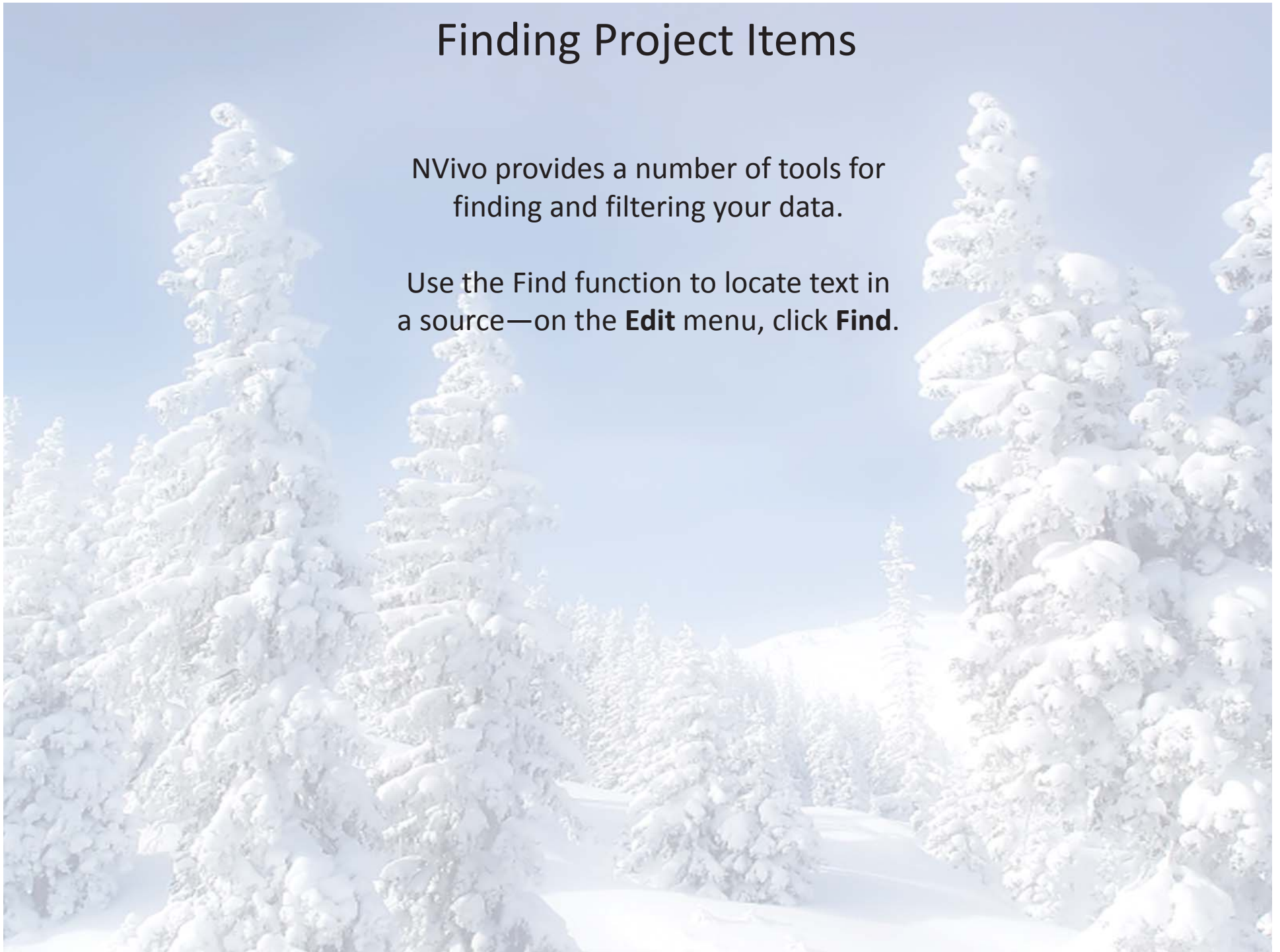
When you are familiar with sources, nodes and coding you can begin to explore other features:

1. Finding project items
2. Querying your data
3. Creating models
4. Creating charts
5. Running reports
6. Exporting data

# Finding Project Items

NVivo provides a number of tools for finding and filtering your data.

Use the Find function to locate text in a source—on the **Edit** menu, click **Find**.





# Finding Project Items

## Advanced Find

Used to filter project items based on selected criteria—for example, find all the cases who are *women* or find all the cases who are *women, over 50, and retired*.

Advanced Find

Look for: Documents

Intermediate | **Advanced**

Created: Anytime Modified: Anytime

In: Any Set Select...

With See Also Link: From Any Item Select...

Coded by: Any Item Select...

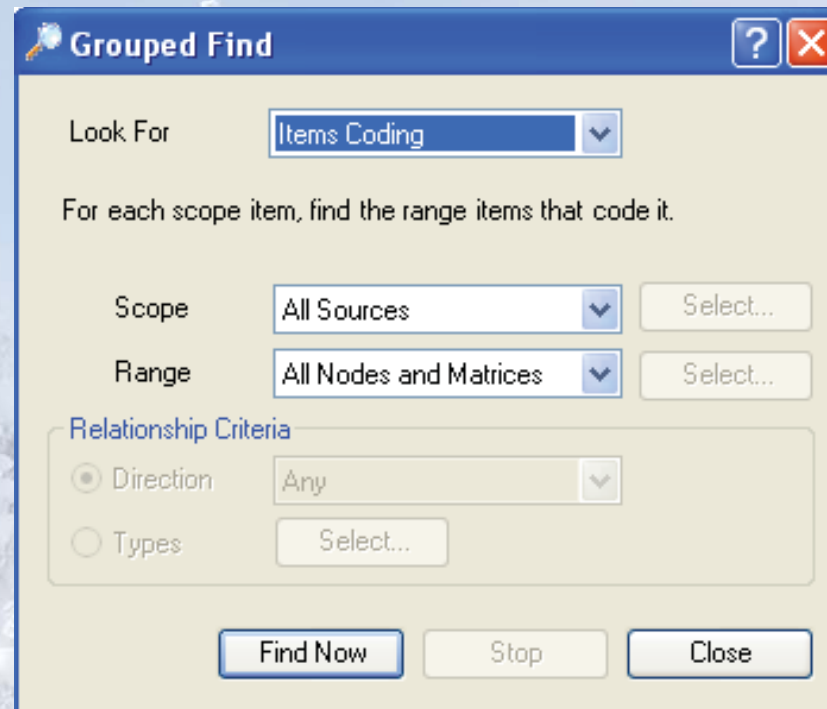
With a: Relationship with Any Item Select...

Find Now Stop Close

# Finding Project Items

## Grouped Find

Used to find items related to other items. For example, you can view a selected source and the nodes that code it.



**Grouped Find** [?] [X]

Look For:

For each scope item, find the range items that code it.

Scope:

Range:

Relationship Criteria

Direction:

Types:

# Creating Tree Nodes

To add children under this node:

1. Click the parent node.
2. On the **Main** toolbar, click the **New** button.
3. Click the **Tree Node in this Folder** option.
4. The **New Tree Node** dialog box is displayed.
5. Enter the required name and description.
6. Click **OK**.

The node is added under the parent node. Add as many children as required.

# Querying Your Data

## Coding Query:

Gathers content based on how it was coded. For example, show me all the content where *women* talked about *personal goals*.

**Coding Query** [?] [X]

Add To Project

**Coding Criteria** | Query Options

Simple | Advanced

Search for content coded by

Node

Any case where

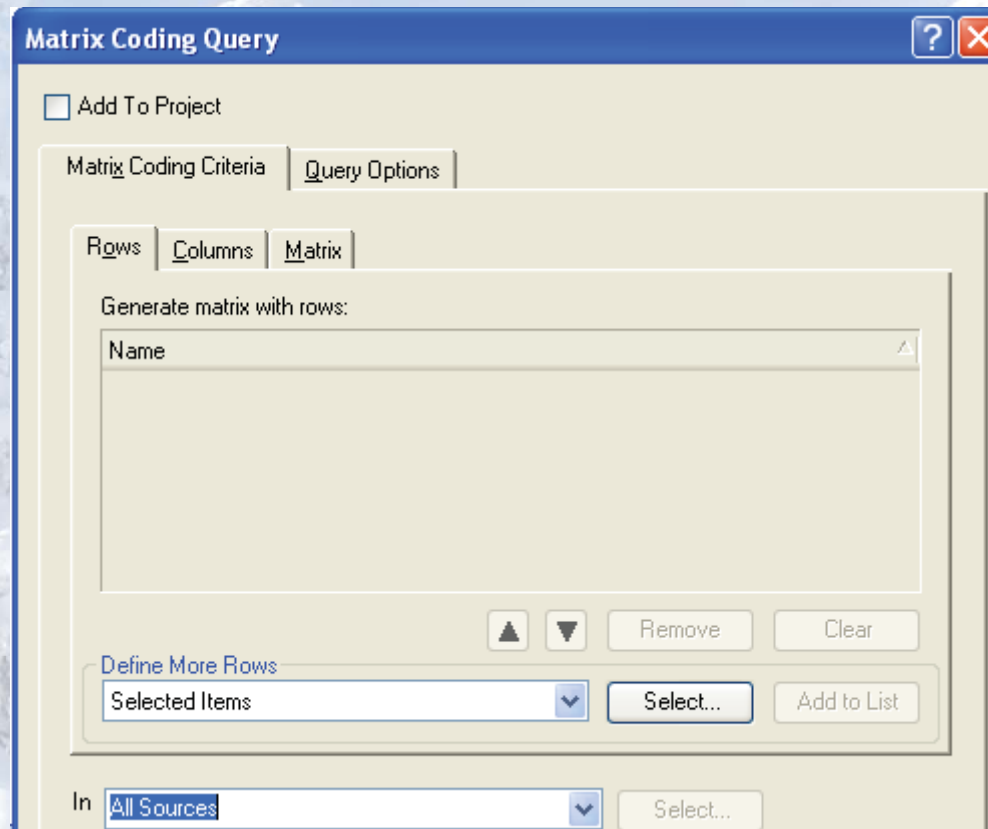
Attribute

In

# Querying Your Data

## Matrix Coding Query:

Creates a matrix of nodes based on search criteria. For example, show me *attitudes about volunteering by age group*.

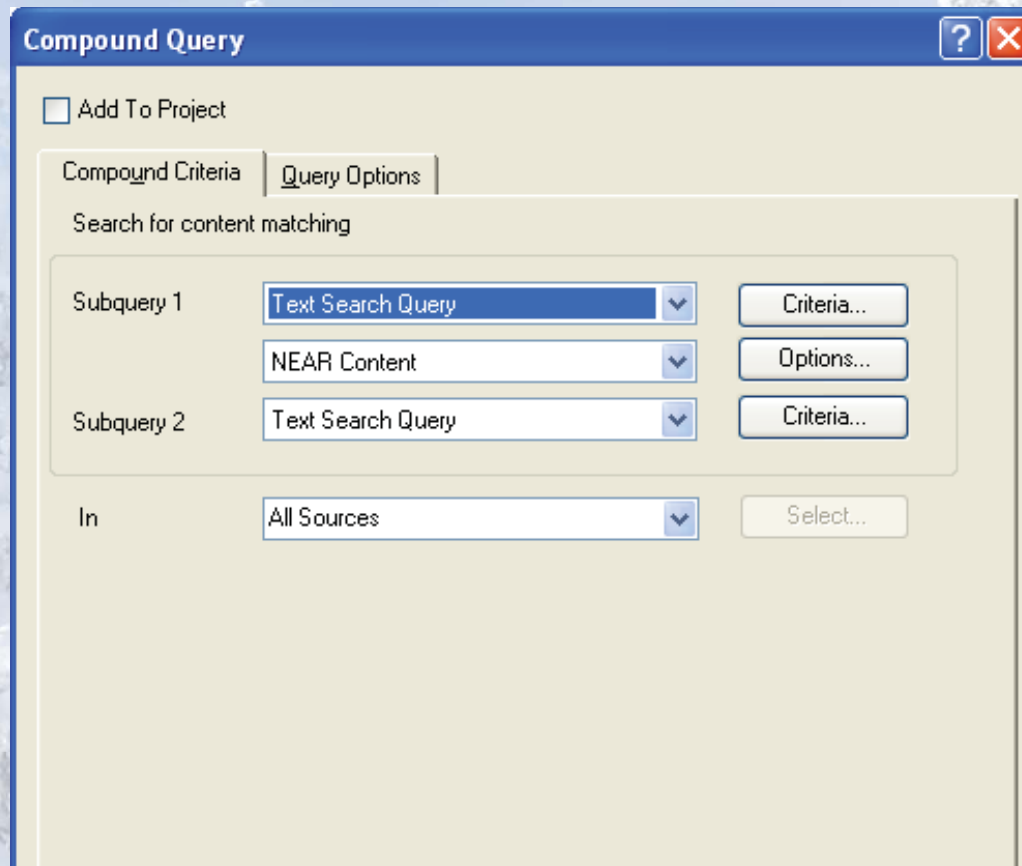


The screenshot shows a software dialog box titled "Matrix Coding Query". It features a blue title bar with a help icon and a close button. Below the title bar, there is a checkbox labeled "Add To Project". The main area contains two tabs: "Matrix Coding Criteria" and "Query Options", with "Query Options" currently selected. Under the "Query Options" tab, there are three sub-tabs: "Rows", "Columns", and "Matrix", with "Rows" selected. A section labeled "Generate matrix with rows:" contains a large empty text area with a "Name" label and a small upward-pointing triangle icon on the right. Below this text area are four buttons: an upward-pointing triangle, a downward-pointing triangle, "Remove", and "Clear". A section labeled "Define More Rows" contains a dropdown menu with "Selected Items" selected, a "Select..." button, and an "Add to List" button. At the bottom of the dialog, there is a label "In" followed by a dropdown menu with "All Sources" selected and a "Select..." button.

# Querying Your Data

## Compound Query:

Combines text and coding queries—search for specified text in or near coded content.



The image shows a screenshot of a software dialog box titled "Compound Query". The dialog has a blue title bar with a question mark icon and a close button. Below the title bar, there is a checkbox labeled "Add To Project" which is currently unchecked. The dialog is divided into two tabs: "Compound Criteria" and "Query Options", with "Query Options" being the active tab. Under the "Query Options" tab, the text "Search for content matching" is displayed. The main area of the dialog contains two subquery configurations. "Subquery 1" has a dropdown menu set to "Text Search Query" and a "Criteria..." button. Below it is another dropdown menu set to "NEAR Content" with an "Options..." button. "Subquery 2" has a dropdown menu set to "Text Search Query" and a "Criteria..." button. At the bottom of the dialog, there is an "In" label followed by a dropdown menu set to "All Sources" and a "Select..." button.

**Compound Query** [?] [X]

Add To Project

Compound Criteria | Query Options

Search for content matching

Subquery 1: Text Search Query [v] Criteria...

NEAR Content [v] Options...

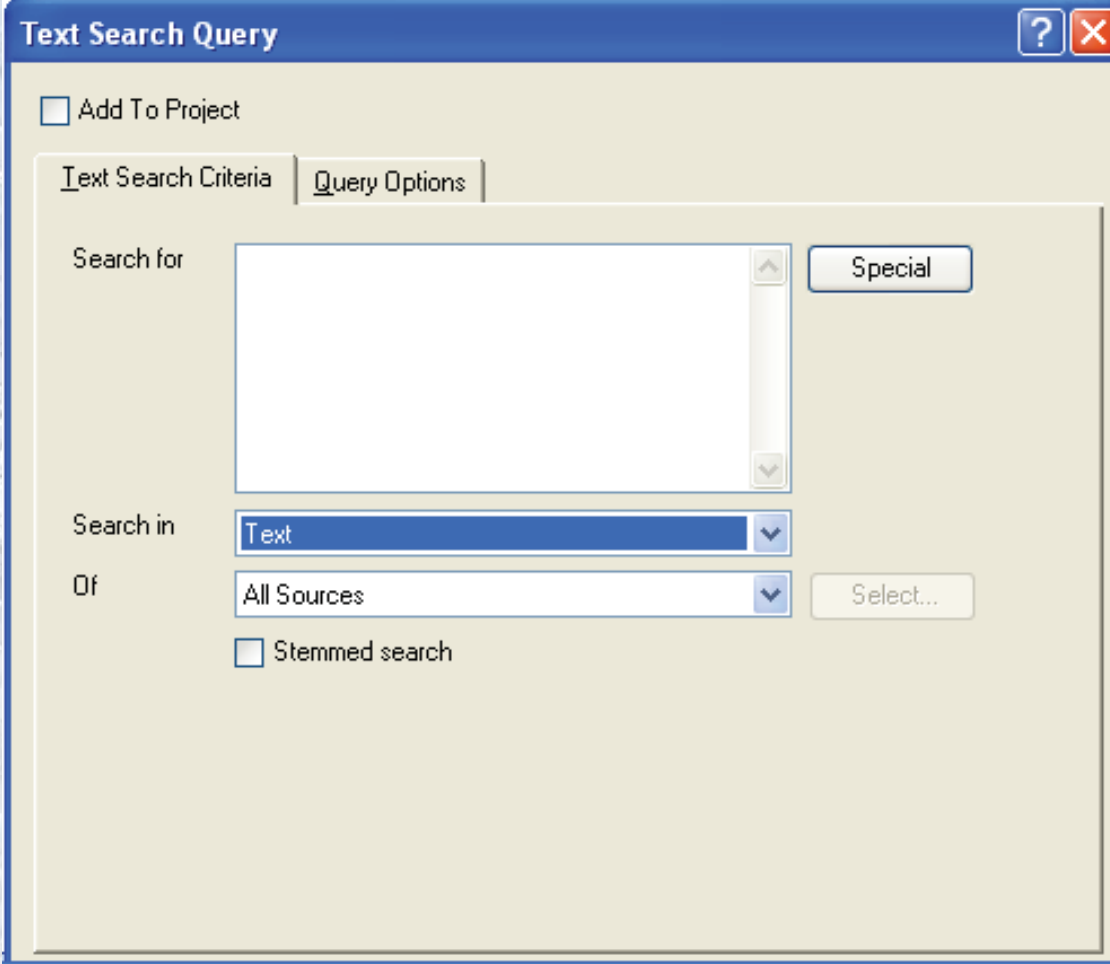
Subquery 2: Text Search Query [v] Criteria...

In: All Sources [v] Select...

# Querying Your Data

## Text Search Query

Used when you are searching



The image shows a screenshot of a software dialog box titled "Text Search Query". The dialog has a blue title bar with a question mark icon and a close button. Below the title bar, there is a checkbox labeled "Add To Project" which is currently unchecked. The main area of the dialog is divided into two tabs: "Text Search Criteria" (selected) and "Query Options". Under the "Text Search Criteria" tab, there are three main sections: "Search for" with a large empty text input field and a "Special" button to its right; "Search in" with a dropdown menu currently showing "Text"; and "Of" with a dropdown menu currently showing "All Sources" and a "Select..." button to its right. At the bottom of the dialog, there is another checkbox labeled "Stemmed search" which is also unchecked.

**Text Search Query** [?] [X]

Add To Project

Text Search Criteria | Query Options

Search for

Search in

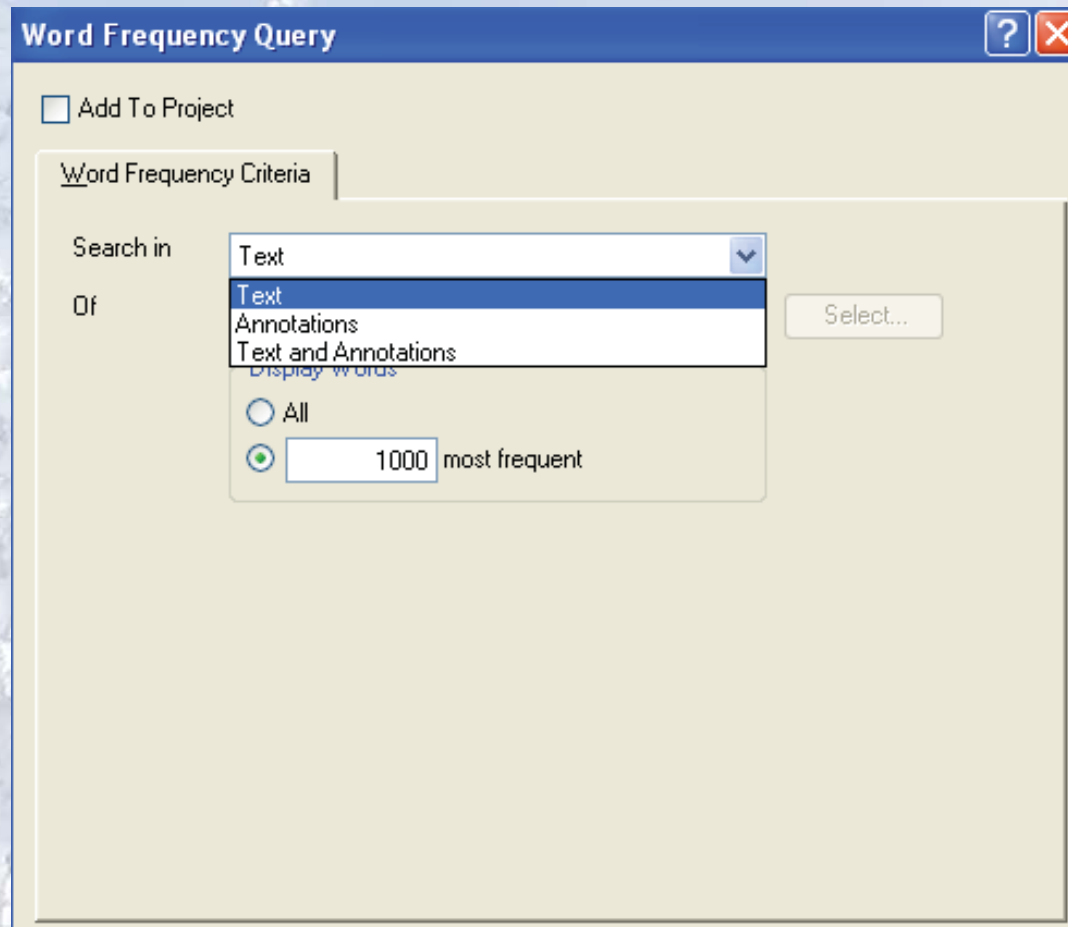
Of

Stemmed search

# Querying Your Data

## Word Frequency Query:

Lists words and the number of times they occur in selected items. Seeing which words appear most frequently can help you to identify themes and concepts.



The image shows a software dialog box titled "Word Frequency Query". At the top left, there is a checkbox labeled "Add To Project" which is currently unchecked. Below this is a tabbed interface with a single tab labeled "Word Frequency Criteria". The main area of the dialog contains the following elements:

- A "Search in" label followed by a dropdown menu currently showing "Text".
- An "Of" label followed by a list box containing three options: "Text", "Annotations", and "Text and Annotations". The "Text" option is selected and highlighted in blue.
- A "Select..." button to the right of the list box.
- Below the list box, there are two radio button options: "All" (which is unselected) and "1000 most frequent" (which is selected).
- A small blue link labeled "Display words" is positioned below the "Text and Annotations" option in the list box.

The dialog box has a standard Windows-style title bar with a question mark icon and a close button (X) on the right side.



# Querying Your Data

## Coding Query:

Gathers content based on how it was coded. For example, show me all the content where *women* talked about *personal goals*.

**Coding Query** [?] [X]

Add To Project

Coding Criteria | Query Options

Simple | Advanced

Search for content coded by

Node

Any case where

Attribute

In

# Creating Charts

1. On the **Tools** menu, click **Charts**. The **Chart Wizard** dialog box is displayed.

2. Select the chart you want to create and click **Next**.

3. Select the data you want to chart in the options provided. These options will change depending on the chart you want to generate.

4. Click **Finish** to generate the chart. The chart will be displayed in **Detail View**.

# Running Reports

## To run a report:

1. On the **Tools** menu, click **Reports**.
2. Select the required report.
3. Select options for the report layout.
4. Click **OK**.

The report is displayed in the **Report Viewer**.

# Running Reports

## **Project Summary:**

A list of the project status in terms of the items it contains. This can be useful for communicating or recording the overall progress of your project.

## **Source Summary:**

A list of the sources in the project including the number of nodes that code them. It also contains information about paragraph and word length.

## **Node Summary:**

A list of the nodes in the project including the number of sources coded at each node. This can help you to see which themes or ideas are occurring more than others.

## **Relationship Summary:**

A list of relationships organized by relationship type. This gives you an indication of how much coding has been done for each relationship type.

# Running Reports

## **Attribute Summary:**

A list of attributes and the number of cases assigned to each attribute value. This is a useful way of checking for consistency and balance in the project sample.

## **Coding Summary:**

A list of sources and the nodes that code them—a useful way to check the progress of your coding. You can report on sources coded by all or selected users.