NOVEMBER 2024

GUIDELINES FOR UTILIZING NVIVO: A COMPREHENSIVE RESOURCE

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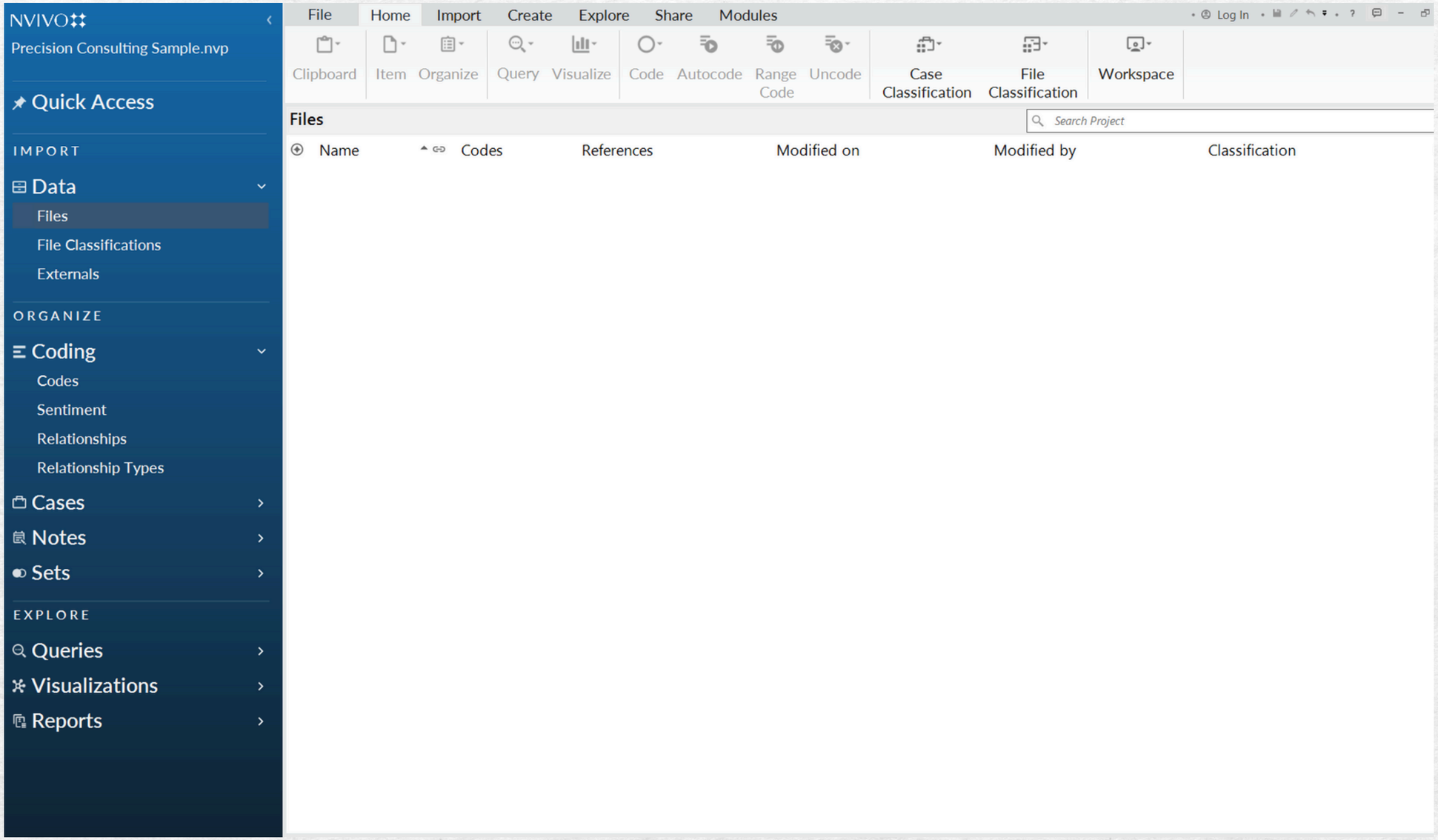
Overview of User Interface



Step-by-Step Guide to Starting a New Project in NVivo

To start a new project:

1. Open the NVivo Application

Launch the NVivo application by clicking the QSR NVivo icon on your desktop. When the application opens for the first time, the NVivo User dialog box will appear.

2. Update User Information

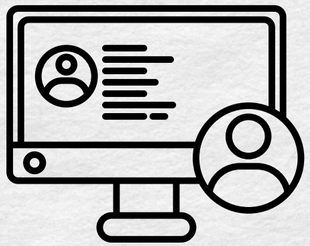
In the dialog box, the Name field will display your Windows username by default. Update this if necessary, especially if the Windows login is shared with others, by entering your own name.

3. Enter Your Initials

Fill in the Initials field with your initials and click OK to proceed.

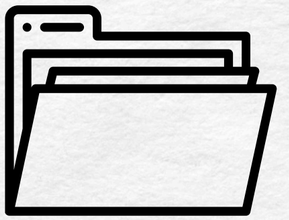
4. Create a New Project

On the Welcome screen, click the New Project button to begin creating your project.



Step-by-Step Guide to Starting a New Project in NVivo

Completing the New Project Setup in NVivo:



5. Name Your Project

In the New Project dialog box, enter a name for your project in the Title field.

6. Add a Project Description (Optional)

If needed, provide a description of your project in the Description field. This could include details such as the objectives of your research project.

7. Choose a Project Location

To change the default location for saving your project, click the Browse button and select your preferred location.

8. Finalize and Open the Project

Click OK to proceed. The NVivo window will open, displaying your project name in the Title bar and your initials in the Status bar.

Types of Nodes in NVivo

Key Types of Nodes in NVivo Explained:

1. Free Nodes

Independent nodes that are not organized in a hierarchy.

2. Tree Nodes

- **Parent Nodes:** Represent general categories.
- **Child Nodes:** Represent specific sub-categories under parent nodes.

3. Cases

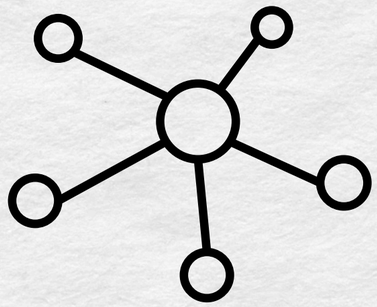
Nodes used to store demographic or attribute-related information about participants or entities.

4. Relationships

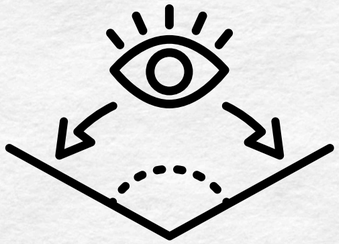
Nodes that define and describe the connections between two project items.

5. Matrices

A set of nodes generated from a matrix coding query, often used for comparisons or data summarization.



Three Types of Views



Overview of NVivo Interface Components:

1. Navigation View

Located on the left side of the screen, this panel allows you to browse and access your sources and project items.

2. List View

Positioned at the top portion of the workspace, this section displays a list of items contained within the sources or nodes selected in the Navigation View.

3. Detail View

Occupying the central and lower-right portion of the screen, this area displays the content of the selected sources. It is also where coding occurs. The Detail View supports multiple tabs, enabling you to work with different sources simultaneously. Tabs are located in the top-left corner of the Detail View area.

Key Terms in NVivo

Essential Concepts and Tools in NVivo

1. Queries

Queries allow you to explore your data, uncover patterns, and refine ideas. They can be saved, re-run with new data, and used to track changes in results over time.

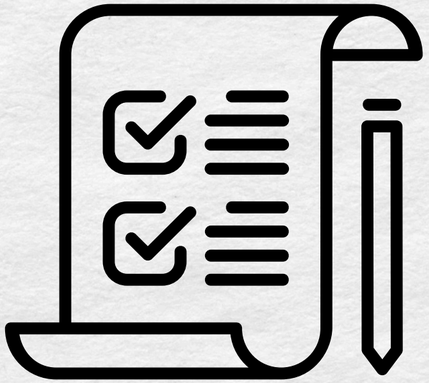
2. Models

Models help visualize your project's structure or findings.

- **Static Models:** Represent your project at a specific moment in time.
- **Dynamic Models:** Reflect your project in real-time, capturing ongoing developments.

3. Links

NVivo offers several methods for linking data elements within your project to enhance organization and analysis.



Key Terms in NVivo

Linking and Organizing Tools in NVivo

1. Memo Links

Attach memos to sources or nodes to document related insights or contextual information.

2. “See Also” Links

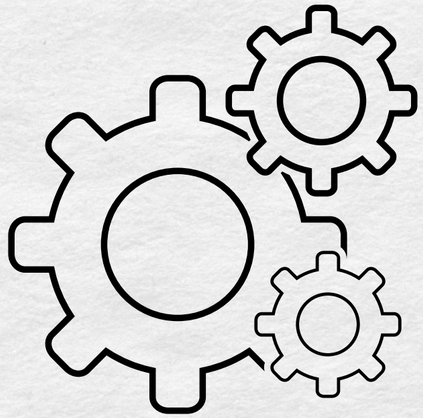
Create pointers between content in sources, nodes, models, or sets to establish connections.

3. Annotations

Add notes directly to selected content, similar to writing in the margins of a document, to capture comments or observations.

4. Classifications

- **Cases:** Organize cases by defining attributes like gender, age, or location.
- **Relationships:** Define types of relationships, such as "loves," "impacts," "employs," or "is married to."



Understanding Sources in NVivo

Managing Research Materials in NVivo

In NVivo, "sources" refers to the research materials you use for analysis. These materials can include a wide variety of formats, from handwritten notes to video recordings. After setting up your project, you can organize and import your data as follows:

1. Import Internals

Primary sources you can directly import into NVivo, such as:

- **Documents:** Including text files (.txt), rich text (.rtf), PDFs (.pdf), and Word documents (.doc). Examples include interview transcripts, emails, or literature reviews.
- **Create Documents in NVivo:** NVivo allows you to create and edit documents within the software. Refer to the help documentation for further instructions.

2. Create Externals

Use externals to represent files you cannot directly import, such as:

- Handwritten diaries, physical books, or presentations (e.g., PowerPoint files).
- This feature allows you to reference and organize such sources alongside your digital materials.

Understanding Sources in NVivo

Supported Media Types in NVivo

1. Video Recordings

NVivo supports various video formats, including .mpg, .mpeg, .mpe, .wmv, .avi, .mov, .qt, and .mp4. Examples include:

- Interviews or observations captured on video.
- Media clips relevant to your research.

2. Audio Recordings

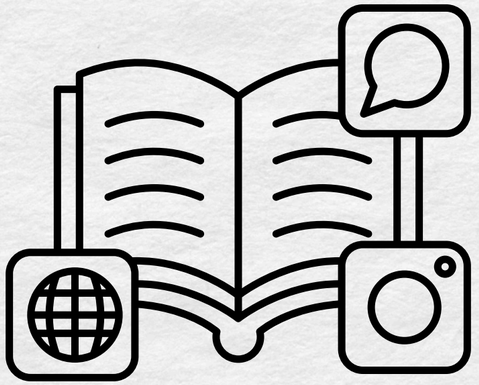
Audio files in formats like .mp3, .wma, and .wav can be imported. These might include:

- Audio interviews or focus group discussions.
- Podcasts, music, or other relevant sound recordings.

3. Pictures

Image files in formats such as .bmp, .gif, .jpg, .jpeg, .tif, and .tiff can be used. Examples include:

- Photographs to elicit participant responses.
- Images taken by research participants themselves.



Introduction to Coding in NVivo

Simplifying the Coding Process in NVivo

1. Basic Coding

Coding helps organize all content related to a specific topic into one place. By opening a node, you can view all the references associated with that topic.

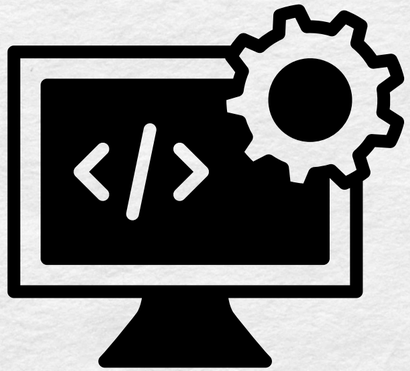
2. Advanced Coding

Use Text Search Queries to locate all instances of a particular word and code them automatically. For example, search for occurrences of the word "fun" and code them under the node Enjoyment.

3. Auto Coding

For structured data like survey responses, NVivo offers auto-coding features to:

- Code by paragraph.
- Use paragraph styles or transcript fields for efficient organization.



Introduction to Coding in NVivo

Steps for Coding Content in a Document

1. Open the Document

Open the document you wish to code; it will appear in the Detail View.

2. Access Nodes

Open the appropriate node folder to display nodes in the List View.

3. Adjust Views for Coding

If needed, re-arrange the views for convenience:

- Go to the View menu, select Detail View > Right.

4. Drag-and-Drop Coding

- Highlight the content you want to code.
- Drag the selected content to the desired node.

5. Create a New Node for Coding

a. On the Coding Toolbar, select Name from the Code At drop-down menu.
b. Enter a name for the new node in the following field.
c. Choose a location for the node from the In drop-down menu.
d. Click the Code button to complete the process.

*Viewing Coded Content

Double-click the node to open it and view the coded content associated with it.

Introduction to Coding in NVivo

Steps for Coding an Audio or Video Source

1. Open the Audio or Video Source

Open the desired audio or video file in NVivo. It will be displayed in the Detail View.

2. Access Nodes

Open the appropriate node folder to display nodes in the List View.

3. Code Directly on the Timeline

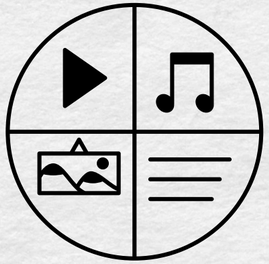
- Select a portion of the audio or video timeline.
- Drag and drop the selected segment onto the desired node.

4. Code Text in the Transcript

- Select a specific row in the transcript and drag it to the required node.
- Alternatively, highlight specific text in the Content column, right-click, and choose to code it at a node.

*Viewing Coded Content

Double-click on the node to see the segments or text you have coded.



Exploring Nodes and Advanced Features in NVivo

Opening a Node to View Coded References

1. In Navigation View, click on Nodes.

2. Select the required node type.

3. In List View, double-click the node you want to open.

4. The node will appear in Detail View with the Reference tab displayed, showing all the coded references.

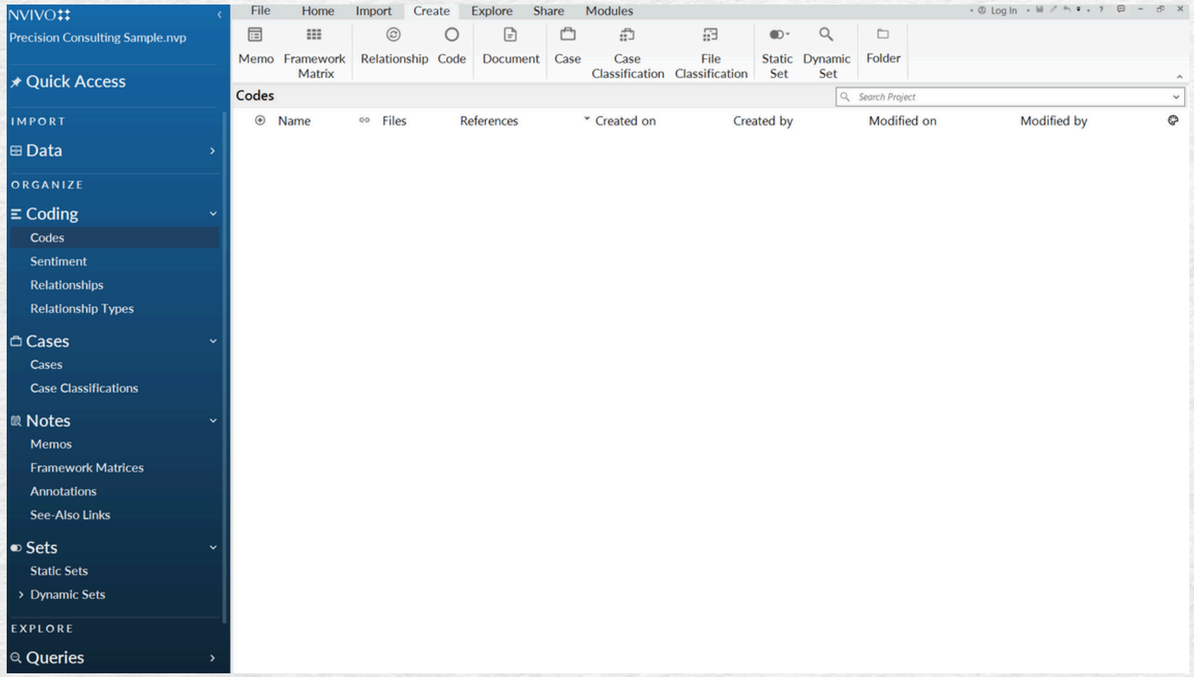
Once you are familiar with sources, nodes, and coding, you can explore more advanced functionalities, including:

1. **Finding Project Items:** Locate specific items within your project.
2. **Querying Your Data:** Use queries to analyze and search through your data.
3. **Creating Models:** Visualize patterns and relationships in your project.
4. **Creating Charts:** Generate charts to represent data visually.
5. **Running Reports:** Produce detailed reports based on your project data.
6. **Exporting Data:** Export your data for use outside NVivo.

Finding Project Items in NVivo

Tools for Finding and Filtering Data in NVivo

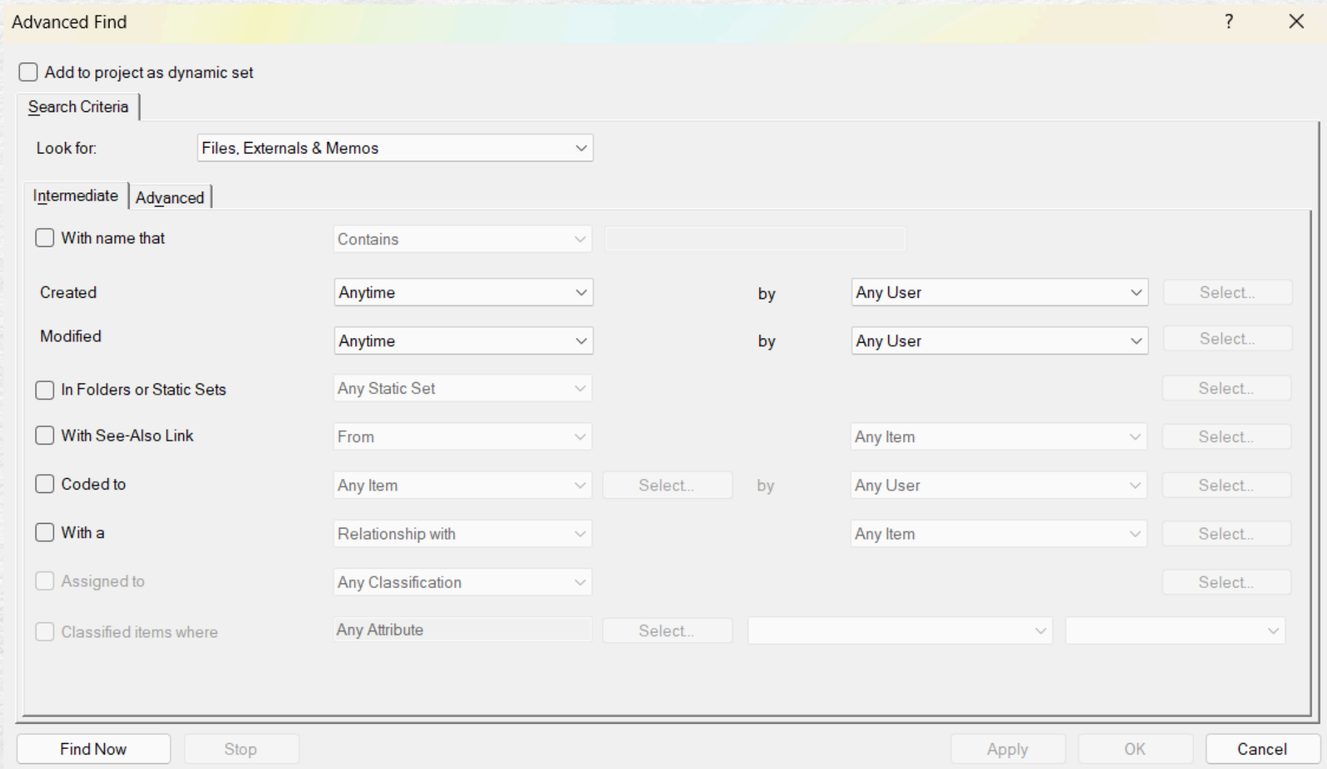
- NVivo offers various tools to help you search and filter your data efficiently.
- Utilize the Find feature to locate specific text within a source by selecting Find from the Edit menu.



Advanced Search in NVivo

Filtering Project Items with Advanced Criteria

Used to filter project items based on specific criteria, such as identifying all cases involving women or narrowing it down further to women who are over 50 and retired.

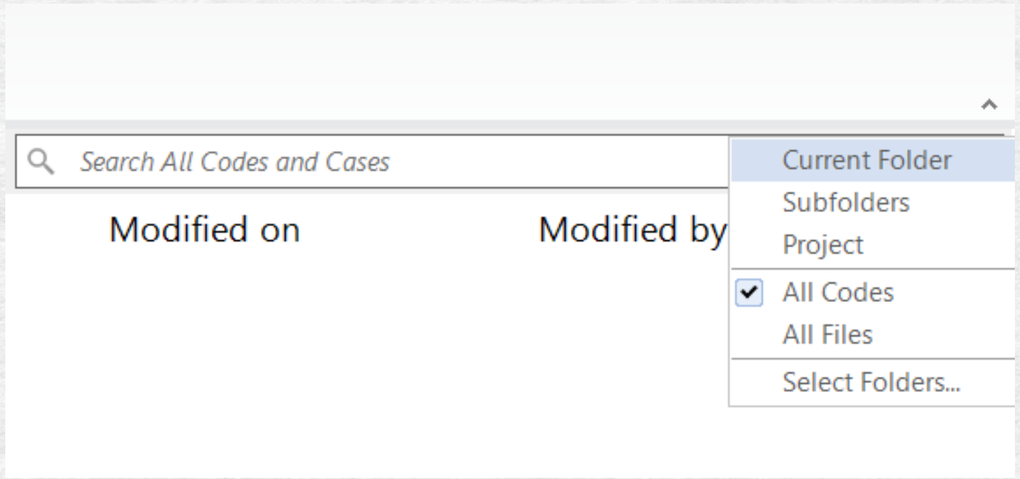


Searching All Codes and Cases

Customizing Searches for Codes and Cases

The "Search All Codes and Cases" feature in NVivo allows you to efficiently locate specific data across various parts of your project. Here's how you can refine your search:

1. **Current Folder:** Limits the search to the folder currently open in your project.
2. **Subfolders:** Expands the search to include all subfolders within the current folder.
3. Project: Searches the entire NVivo project, encompassing all folders, files, and nodes.
4. **All Codes:** Focuses the search on all the codes (nodes) within your project.
5. All Files: Searches across all files in the project, including documents, transcripts, and media files.
6. **Select Folder:** Allows you to choose a specific folder for targeted searching.

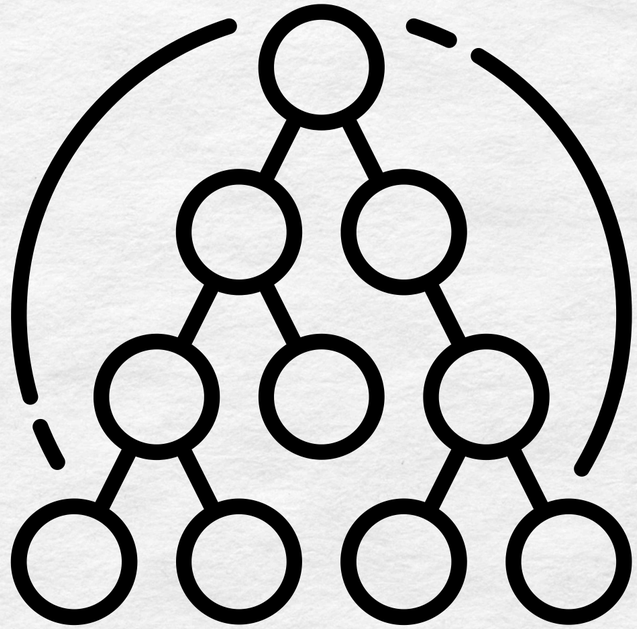


Organizing Data with Tree Nodes

Adding Child Nodes Under a Parent Node

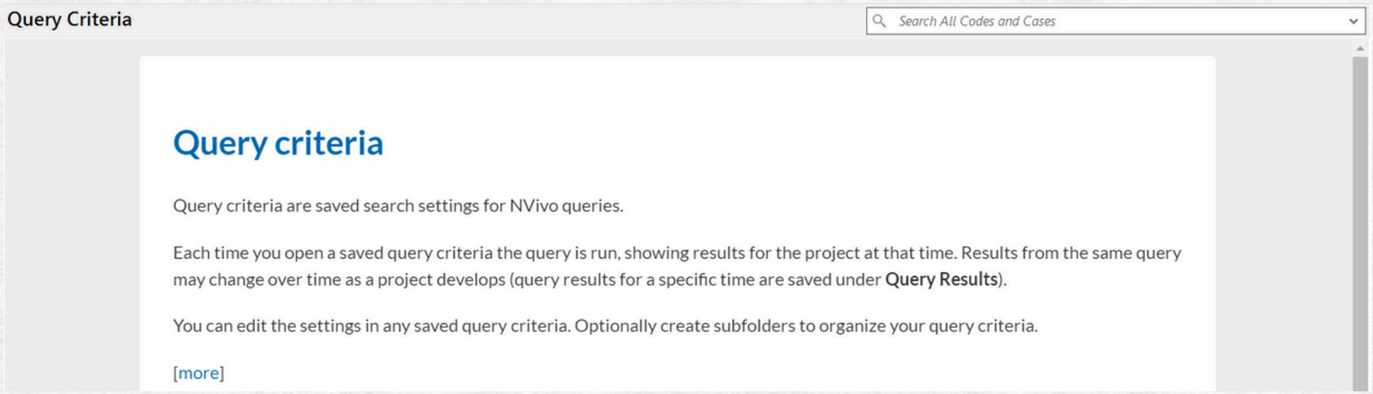
To create child nodes under a parent node:

1. **Select Parent Node:** Choose the parent node where the child node will be added.
2. **Access New Node Option:** On the Main Toolbar, click the New button.
3. **Choose Tree Node:** Select the Tree Node in this Folder option to begin creating the child node.
4. **Open New Node Dialog:** The New Tree Node dialog box will appear, prompting you to input details.
5. **Name and Describe Node:** Provide a name and description for the new child node.
6. **Save Node:** Click OK to add the node under the parent.



Querying Data in NVivo

Using Coding Queries for Targeted Analysis



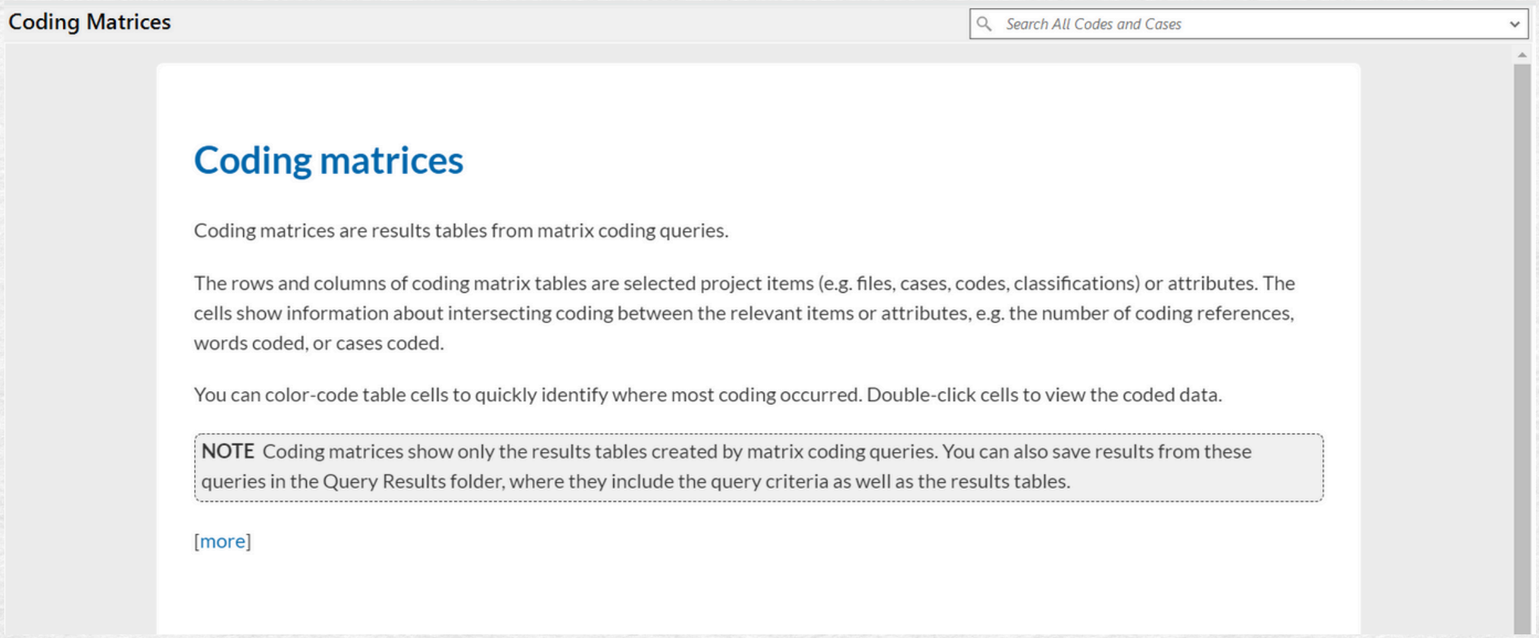
To create child nodes under a parent node:

1. **Select Parent Node:** Choose the parent node where the child node will be added.
2. **Access New Node Option:** On the Main Toolbar, click the New button.
3. **Choose Tree Node:** Select the Tree Node in this Folder option to begin creating the child node.
4. **Open New Node Dialog:** The New Tree Node dialog box will appear, prompting you to input details.
5. **Name and Describe Node:** Provide a name and description for the new child node.
6. **Save Node:** Click OK to add the node under the parent.

*Repeat these steps to add additional child nodes as needed.

Querying Data in NVivo

Creating a Matrix Coding Query for Comparative Analysis



Generates a matrix of nodes according to specified search criteria. For instance, it can display perspectives on volunteering categorized by different age groups.

Advanced Querying in NVivo

Combining Text and Coding with Compound Queries

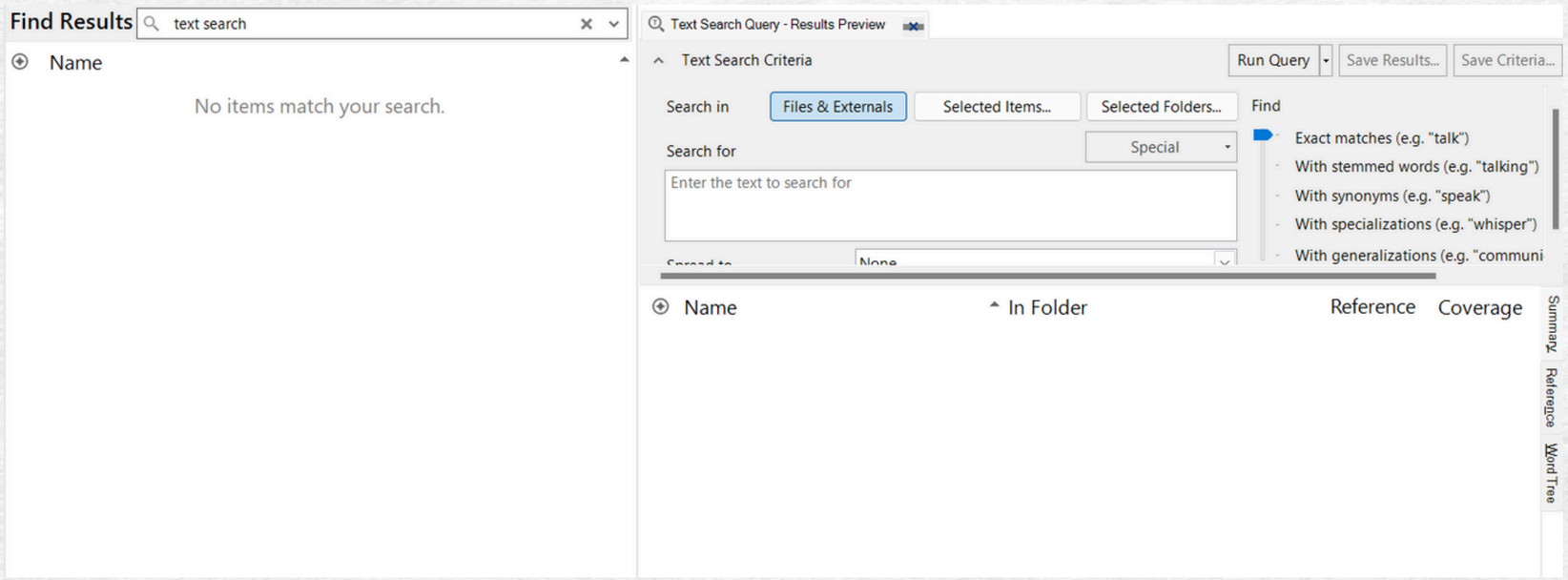
A Compound Query in NVivo is a powerful tool that allows you to combine text searches with coding queries. This means you can:

1. **Search for Specific Text:** Identify occurrences of a particular word or phrase within your data.
2. **Search Near Coded Content:** Narrow down the search to locate text that appears in or near content already coded at specific nodes.

For example, you can use a Compound Query to find instances where the word "challenge" is mentioned within a few lines of content coded under the node "Leadership Issues." This helps refine your analysis by linking textual data with thematic coding.

Exploring Data with Queries in NVivo

Leveraging Text Search Queries



A Text Search Query is a tool in NVivo designed to help you locate specific words or phrases across your project data. It is particularly useful when you need to:

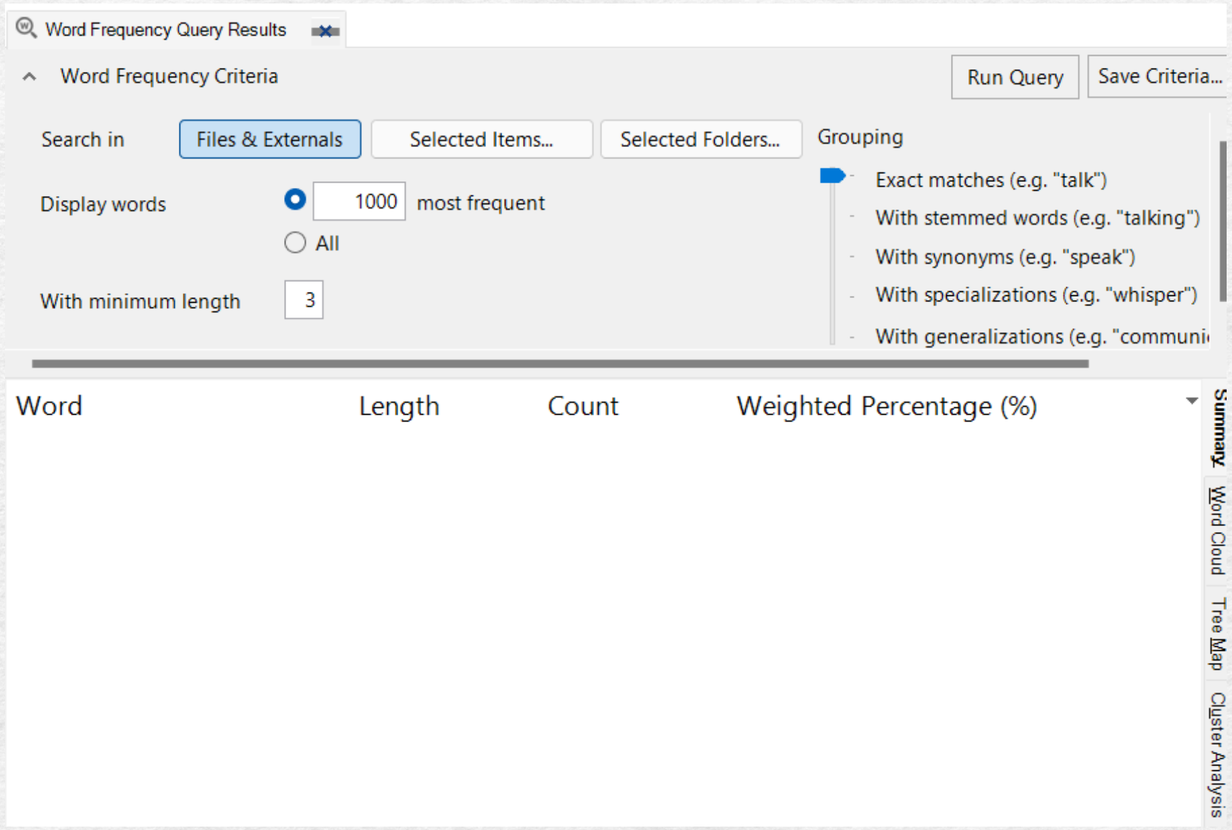
1. **Identify Key Terms:** Search for recurring words or concepts in your documents, transcripts, or other sources.
2. **Uncover Patterns:** Analyze how often and where particular terms are used to gain insights into trends or themes.

This query provides a straightforward way to explore your data and focus your analysis on specific topics of interest.

Analyzing Patterns in NVivo

Word Frequency Queries

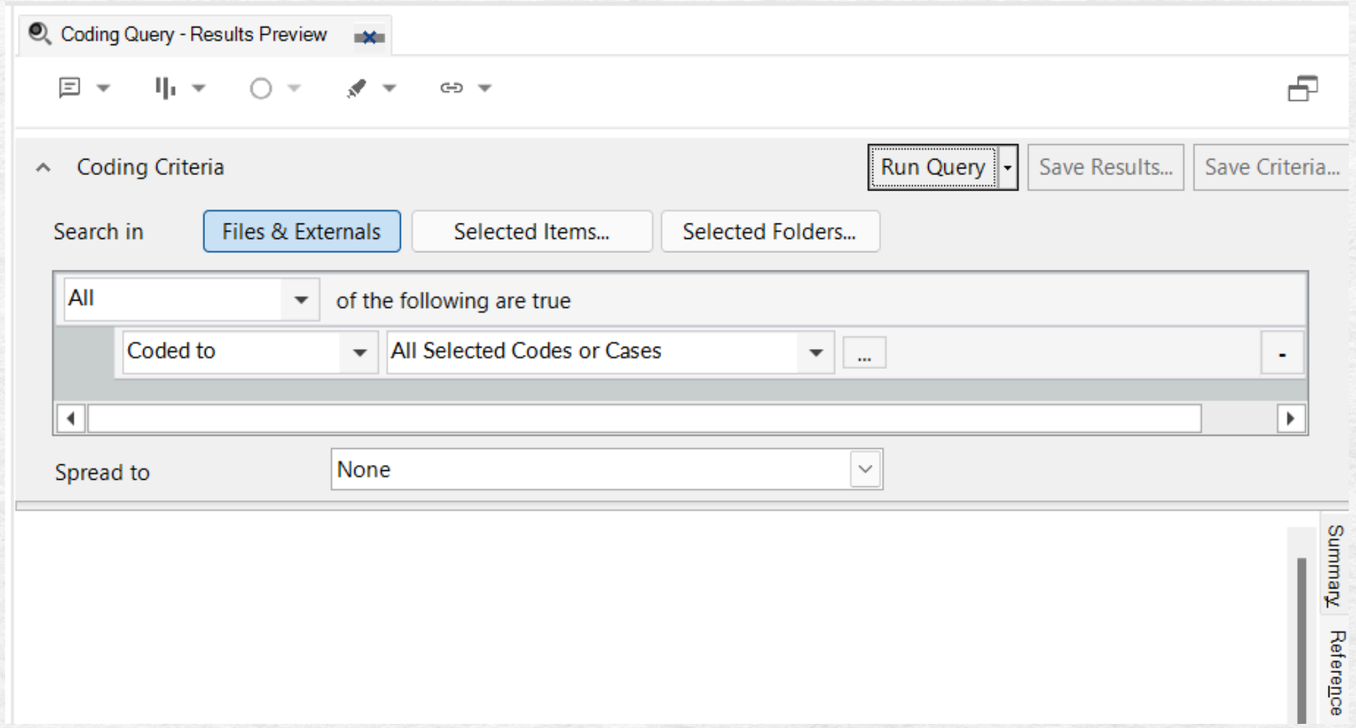
A **Word Frequency Query** generates a list of words along with the number of times they appear in selected data items. This tool helps identify recurring terms, providing insights into potential themes and key concepts within your project.



Analyzing Data in NVivo

Using Coding Queries

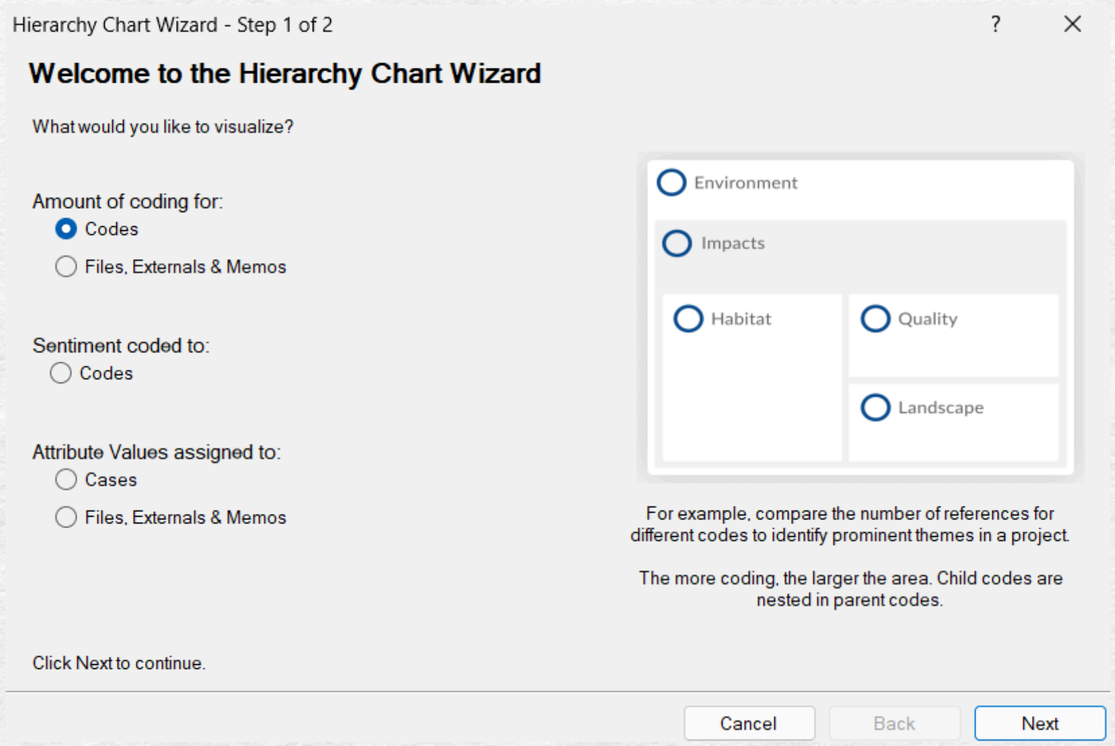
A **Coding Query** retrieves content based on how it has been coded in your project. For example, you can use this tool to gather all content where women discussed personal goals, helping to focus your analysis on specific themes.



Visualizing Data in NVivo

Creating Charts

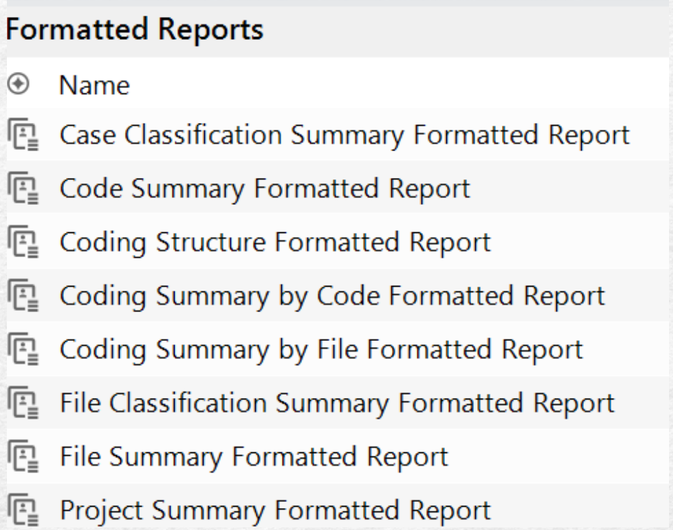
1. **Access Chart Wizard:** From the Tools menu, select Charts to open the Chart Wizard dialog box.
2. **Choose a Chart Type:** Select the type of chart you want to create and click Next.
3. **Select Data for the Chart:** Choose the data you wish to include. The available options will vary depending on the selected chart type.
4. **Generate the Chart:** Click Finish to create the chart, which will be displayed in the Detail View.

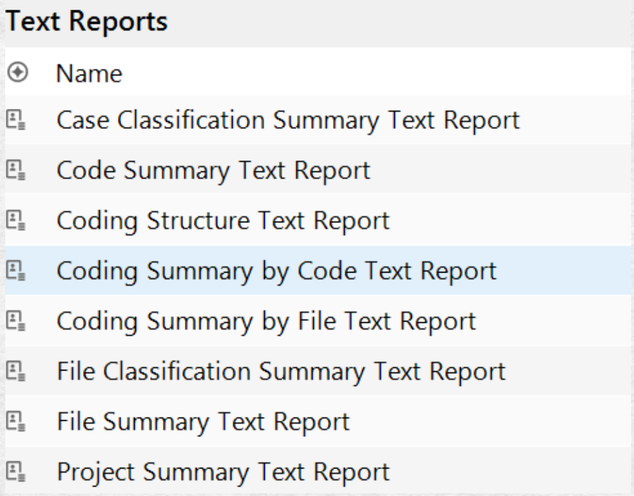


Generating Insights with Reports in NVivo

Running Reports Step-by-Step

1. **Access Reports:** From the Tools menu, select Reports.
2. **Choose a Report:** Pick the specific report you want to run.
3. **Configure Report Layout:** Adjust the layout options according to your preferences.
4. **Generate the Report:** Click OK to run the report, which will be displayed in the Report Viewer.

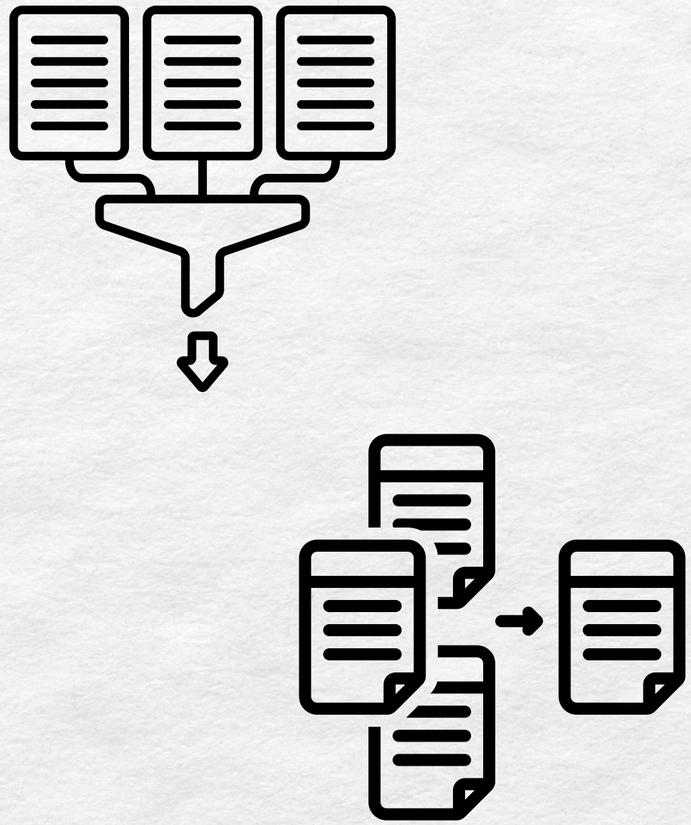




Summarizing Data in NVivo

Types of Project Summaries

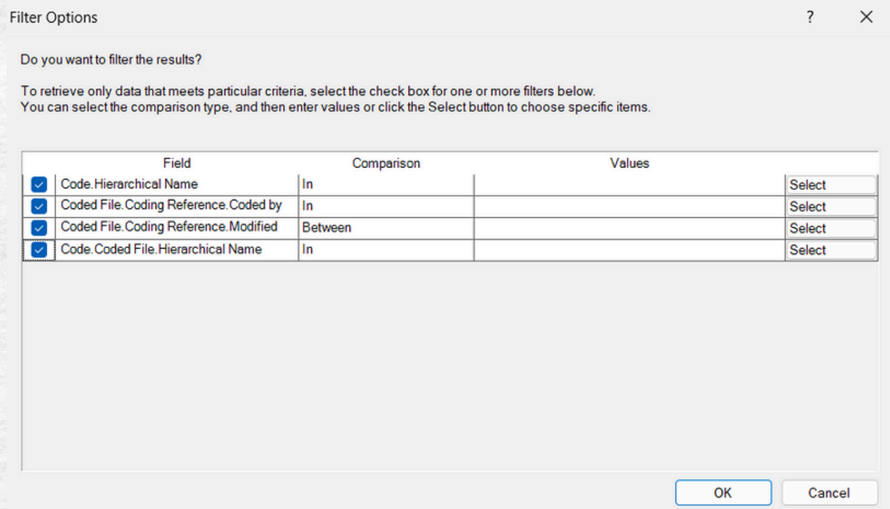
1. **Project Summary:** Provides an overview of the project's status, listing the items it contains. This summary is helpful for tracking and communicating your project's overall progress.
2. **Source Summary:** Details the sources in the project, including the number of nodes that code them. It also provides additional information such as paragraph and word counts.
3. **Node Summary:** Lists all nodes in the project and indicates the number of sources coded at each node. This helps identify themes or ideas that are more prominent within your data.
4. **Relationship Summary:** Organizes relationships by type and highlights the amount of coding done for each. This provides insights into the connections and their coding status in your project.



Running Reports in NVivo

Key Report Types

1. **Attribute Summary:** Displays a list of attributes and the number of cases assigned to each attribute value. This report is valuable for verifying consistency and ensuring a balanced project sample.
2. **Coding Summary:** Provides a detailed list of sources along with the nodes that code them. This is a practical way to monitor the progress of your coding and can include data coded by all or selected users.



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