

Analysing Qualitative Data Using NVivo 9.0

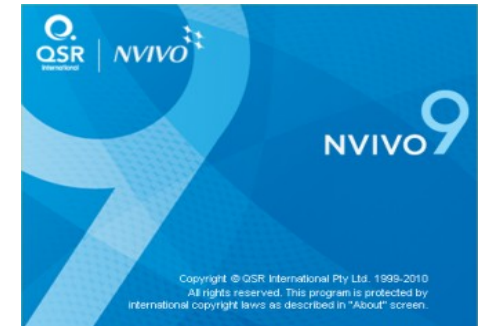
Rev. N9-002

by Nigel Petts, Newcastle Business School

Acknowledgements

The contribution of Tracey Panther's (Oxford Brookes University Business School) earlier NVivo 2 guide in the making of this NVivo 9 guide is acknowledged fully. (Please refer to Tracey's work if you are using the earlier version of NVivo).

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Introduction

Aims of this Guide

- To illustrate Computer-Assisted Qualitative Data Analysis (CAQDAS).
- To provide a basic introduction to qualitative data management and analysis.
- To familiarise the user with NVivo 9 so that he/she can consider its suitability for his/her own needs.

The software

NVivo 9 is licensed in two versions; one is for individual computers and the other is server-based. Please ensure that you have the latest service pack installed (for example, SP1 was launched in February 2011). This guide assumes that you are using the **individual licence version**. We are also presuming that the user is familiar with Microsoft Office 2003 (or a later edition). It is essential that the user has a sound understanding of **Qualitative Research** generally and, more specifically, the principles of **Qualitative Data Analysis**.

About this guide

In this guide, Exercises 1 to 9 are designed to take the user through a series of fundamental steps relating to the use of NVivo 9. These exercises refer to the data set introduced in section 2.3 below. Exercise 10 is designed to give you a starting point for analysis your own data sets using NVivo 9. Within these exercises, the symbol ☐ means that you are required to take action, either by issuing a command(s) or entering text. The specific commands and actions are shown magnified on the left hand side of the page. The ☐ symbol also means that you are required to do something (but it is also a note to experienced users of previous versions of NVivo indicating a new feature in NVivo 9).

Please note: This guide will introduce you to some elementary features of NVivo 9. This is a broad ranging and powerful software, with a great many further features that you may like to explore independently. The publisher, QSR International provides excellent on-line assistance in the form of help guides and animated tutorials please refer there for more in-depth support when you have completed this course. Clicking the help button ? in NVivo 9 (in right-hand top corner) will take you to this link ...

http://help-nv9-en.qsrinternational.com/nv9_help.htm (note the underscore)

Analysing Qualitative Data Using NVivo 9.0

History of NVivo

NVivo is just one of a number of Computer Assisted Qualitative Data Analysis Software (CAQDAS) packages available today. NVivo 9 has had a long heritage in CAQDAS which dates back to its predecessor NUD*IST. It is published by QSR International in Victoria, Australia. This latest version (in 2011) incorporates more connectivity with other packages such as Microsoft Office and Endnote.

Before you use NVivo 9

Before data are analysed in NVivo it is important that you develop an understanding of **Qualitative Research** generally, and the principles of **Qualitative Data Analysis**. Prior to analysis (whether manual or computer assisted), you should always have specific research questions/objectives, and have determined an approach to analysis. Once the approach has been chosen, NVivo 9 can facilitate the process of analysis.

Such software should be thought of as a tool to assist in the process of qualitative data analysis. ***It is not a magic wand!*** Its use doesn't eliminate the need for you to make important decisions regarding the form of the analysis along the way, and of course, you will still be required to interpret the data. No software can replace these tasks. Please do not be mistaken, although NVivo 9 can automate some tasks, ***it does not perform the analysis on your behalf!***

NVivo 9 can be regarded as a valuable project management tool that facilitates the storage, coding and retrieval of data; as we hope this guide will demonstrate.

You have been supplied with two folders (Project1 and Project2) containing the data files that you will be using. Please save these to a location on your computer that you can navigate to easily.

Exercise 1: Starting NVivo 9 and opening a previously saved project

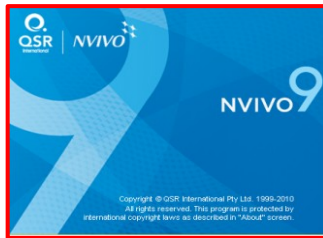
We will start with the opening procedure for NVivo 9. This will take you through the licensing splash screen and into the NVivo 9 **Welcome Screen and Project List**.

- ☑ Store the provided files in an easy to find location on your computer.

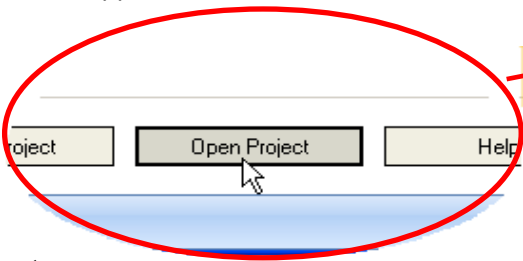


Shortcut Icon

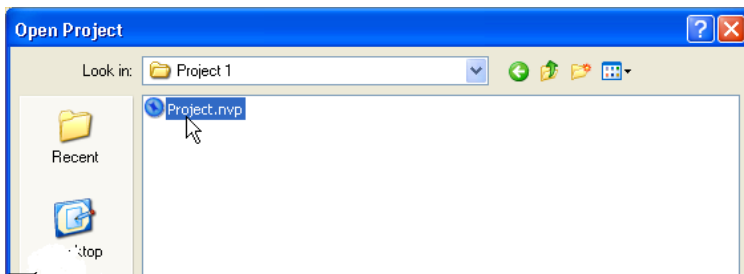
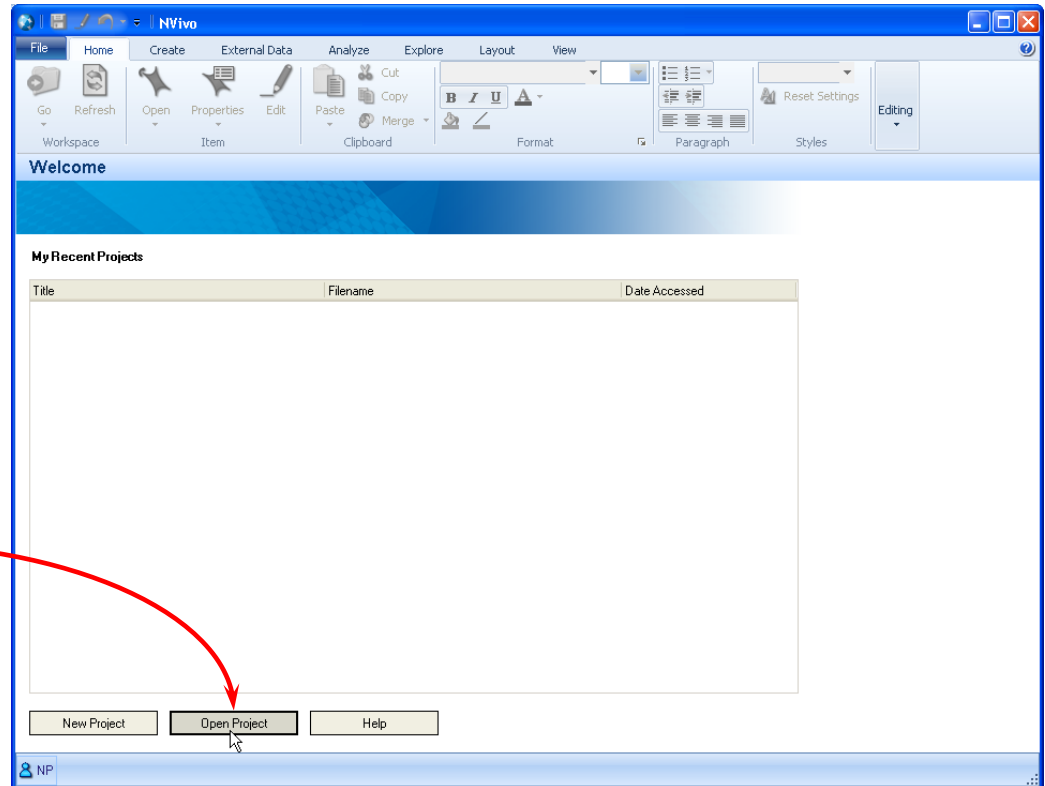
Splash Screen



- ☑ Start NVivo 9 by clicking the Shortcut Icon or using the Windows Start Menu. On start up the blue Splash Screen will appear, giving details of your QSR licence, and then disappear after a few seconds.



- ☑ Click **Open Project** in the **Welcome Screen** and navigate to where you have stored the project files for this exercise.

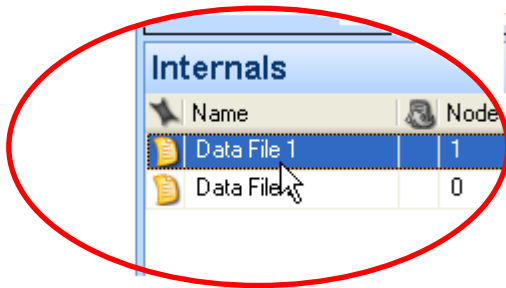


- ☑ Select project.nvp in the Project 1 folder.

This screen will list your recently used projects (none shown here). You can click on any project to resume where you last left off. When opening a project you can either open a NVivo 9 project (*.nvp), or open a project created in a previous version of NVivo (*.nvp or *.qda). However, if the project was created by an earlier version, it will be detected and you will be asked to allow NVivo 9 to create a new copy of the project (*.nvp).

Please note: NVivo 9 projects are not backwardly compatible with older versions of NVivo (even NVivo 8). Please make absolutely sure that you do not need to do some of your work in the earlier version before committing to NVivo 9.

Exercise 2: Opening a previously created NVivo 9 project



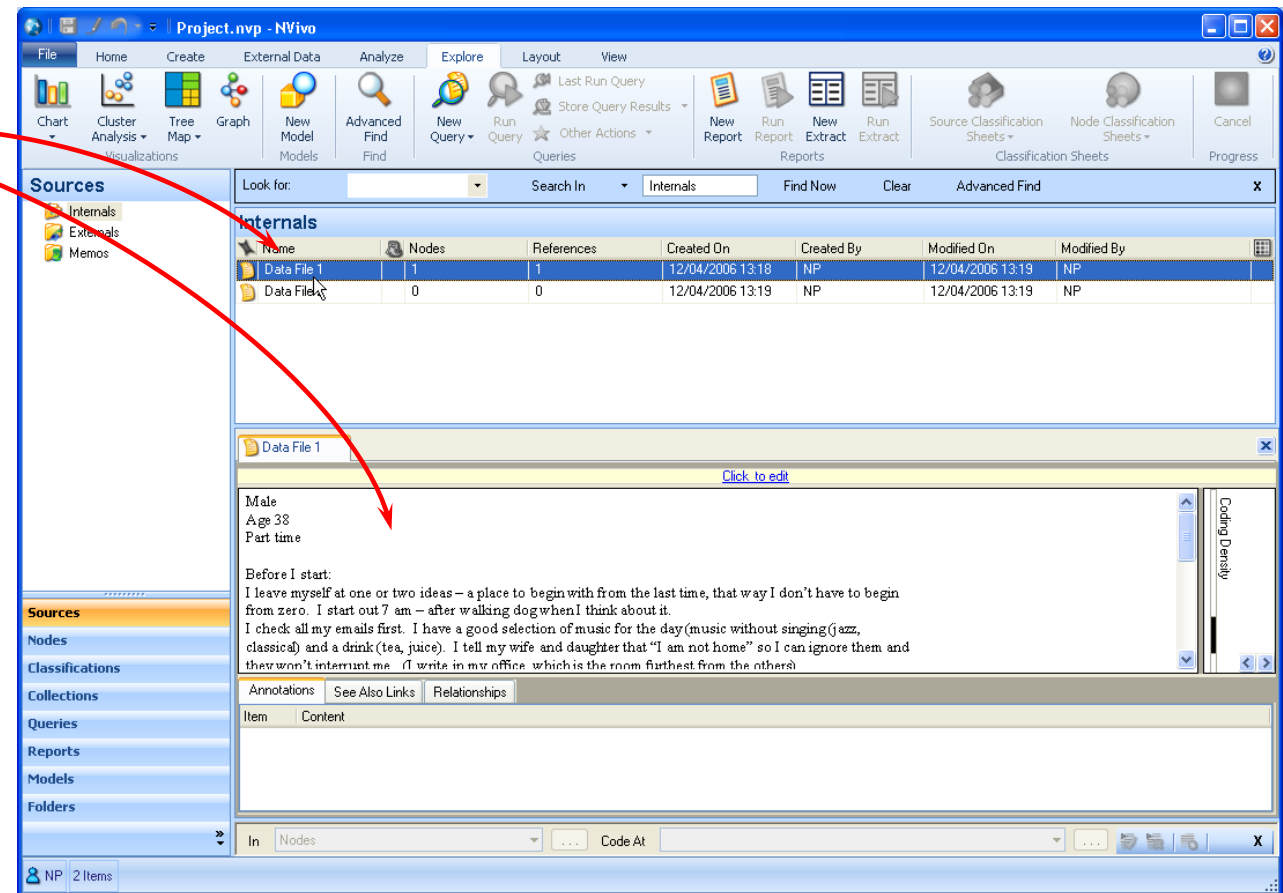
- ☒ Double-click Data File 1 to reveal the Detail View below

About this data set

These data were collected from students who, as part of a class on *Writing and Writer's Block*, were set the following preparatory work: "Describe in detail how you write. Pay particular attention to the details. There must be no conferring with other people. Bring your written piece to the next class."

The data were obtained from a convenience sample of ten students. Permission to use these data in a suitably anonymised form for teaching purposes was obtained. Thus, the total data set available for this guide to using NVivo for the analysis of qualitative data comprises ten individual data files, each containing a short narrative.

In Exercises 1 to 4, you will notice that just two of these ten data files are referred to, whilst the entire data set forms the basis of Exercises 6 to 9. The last part of exercise 10, will show you how to import your own data into NVivo 9.



Exercise 3: Exploring and Browsing Documents

Before we start browsing we will adjust the workspace for this demonstration. As you will see the NVivo workspace is highly configurable. This arrangement is just one of many that might suit different projects.

☒ Click on View

☒ Select Detail View on ribbon, and click 'Right'

☒ Now Click and Drag Borders to positions as shown in the main view (approximately).

The main image shows the NVivo interface with the following configuration:

- The 'View' tab is selected in the ribbon.
- The 'Detail View' is selected in the 'View' dropdown.
- The 'Right' button is clicked in the workspace.
- The 'Relationships' tab is selected in the bottom pane.

The main view displays the 'Internals' section with a list of 'Data File 1' and 'Data File 2'. The 'Data File 1' is selected, showing a text document with the following content:

Male
Age 38
Part time

Before I start:
I leave myself at one or two ideas – a place to begin with from the last time, that way I don't have to begin from zero. I start out 7 am – after walking dog when I think about it.
I check all my emails first. I have a good selection of music for the day (music without singing (jazz, classical) and a drink (tea, juice). I tell my wife and daughter that "I am not home" so I can ignore them and they won't interrupt me. (I write in my office, which is the room furthest from the others).
I have all articles I might reference in piles, a notebook to set down ideas to remember to include in my article later, and some empty space by the desk. My notebook is next to me. (I turn on the computer before going to sit down so it is ready – I make my tea during that time period).
I decide what section I will write in/about and transcribe notes/paraphrase from articles into it for all the different articles I have (always referencing) and then work on converting them into the key points I want to make.
I edit a lot. Re-reading and re-writing.
I print and edit by pen/paper.
I keep a notebook with me at all times in case ideas come – and I put these into Desk workbook or computer every day.
PhD – File 1 2004

The bottom pane shows the 'Relationships' tab with a table of 'Item' and 'Content'.

Discovering the NVivo 9 Workspace

Now you have configured the workspace for this particular demonstration; let's spend a moment identifying the various areas of the workspace. Even if you are familiar with older versions of NVivo it is worth studying the new layout. The layout is somewhat similar to that found in Microsoft Office 2003 and 2007. MS Office 2010 is also similar (but NVivo 9 does not have a user configurable ribbon).

Quick Tools
Undo, etc

Command Menu

Ribbon

A different ribbon menu appears depending upon the choice made on the command menu.

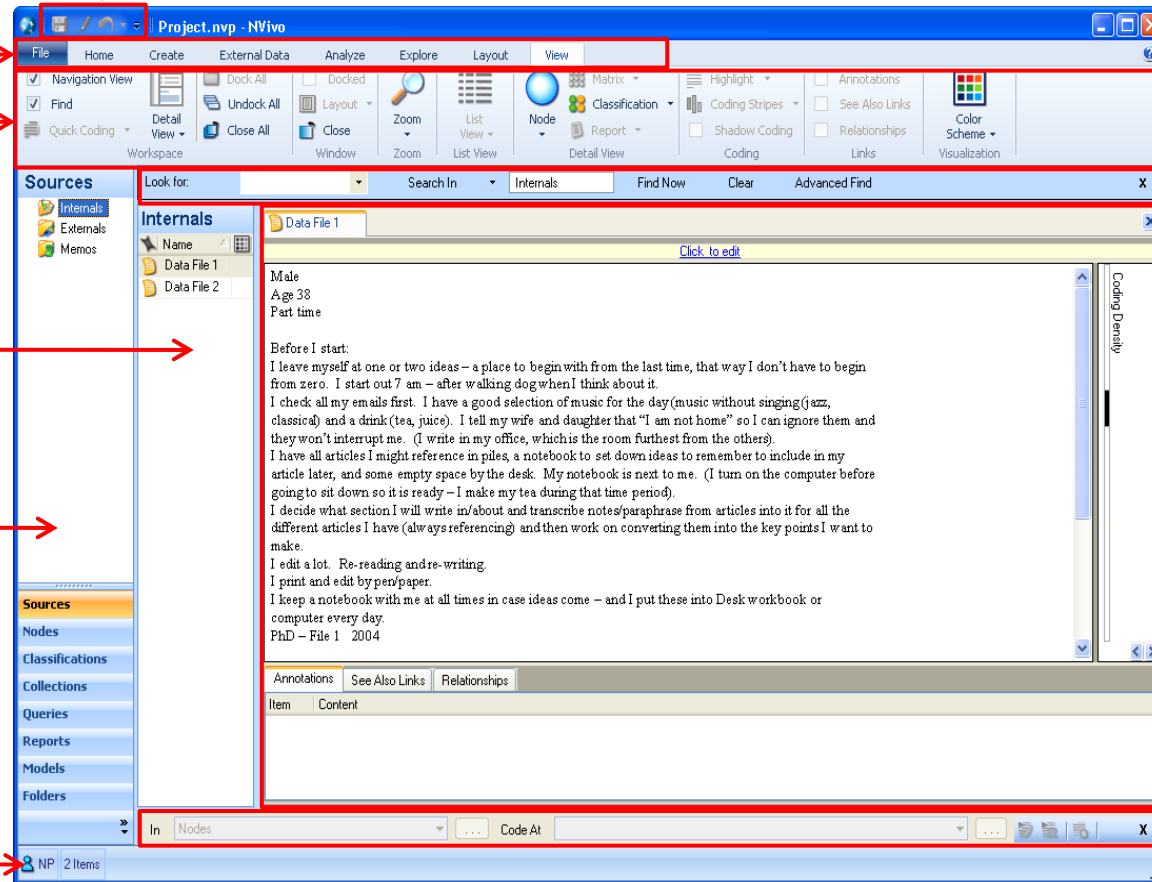
List View

Shows the contents of an item selected in Navigation View

Navigation View

Used to select your project items

Status Line



Search Bar

Various types of search can be conducted on your data from here.

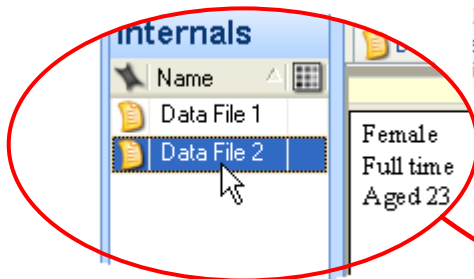
Detail View

This is where you can view your sources and code the material in your project. Detail View can show Text, Transcripts, Images and Video.

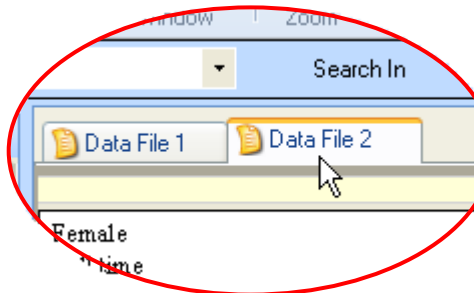
Quick Coding Toolbar

This is particularly useful when coding a large volume of material

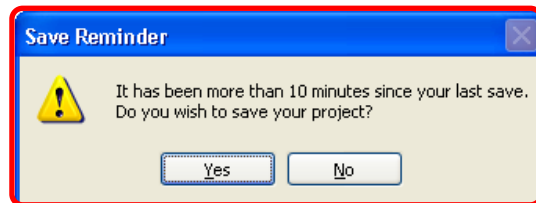
Discovering the NVivo 9 Workspace



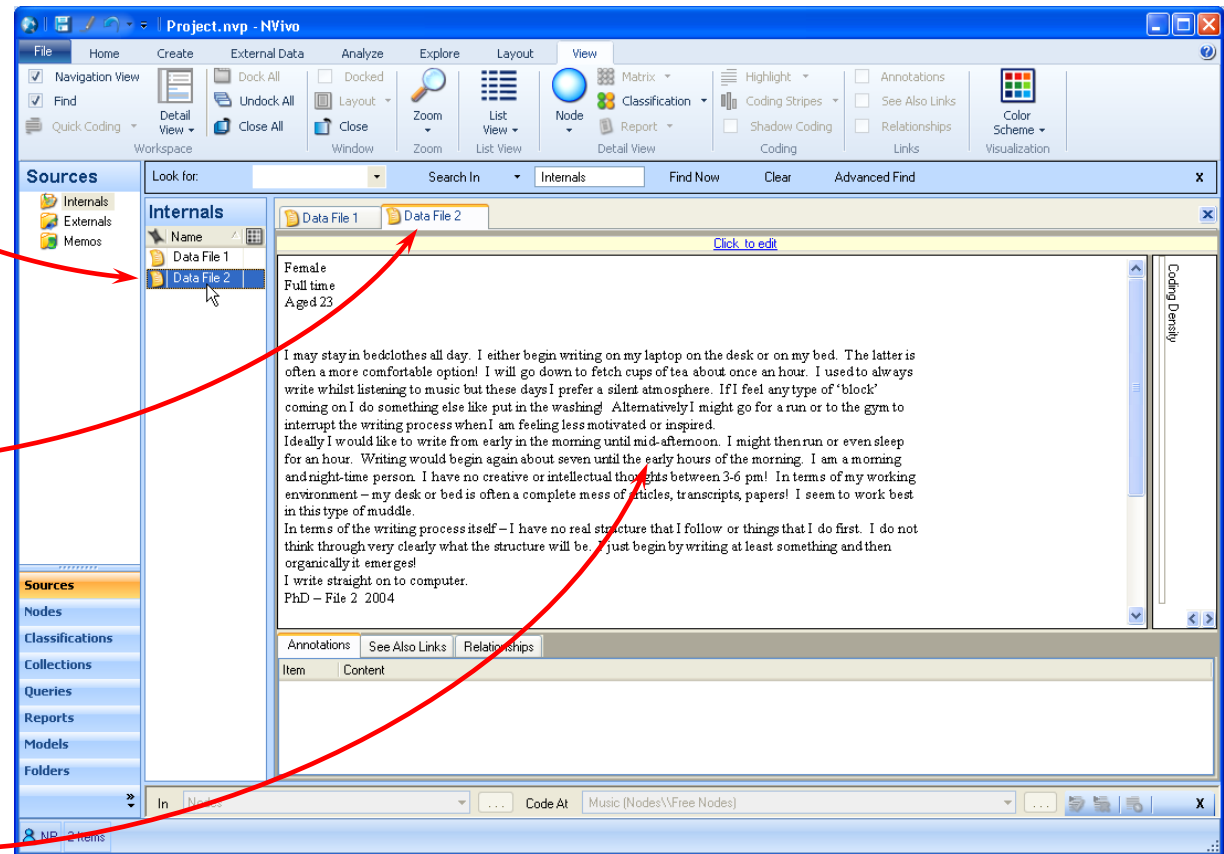
- ✓ Double-click Data File 2 to open the document in Detail View



- ✓ Once opened you can switch between documents by clicking on the Detail View Tabs.



- ✓ When this dialog appears make sure that you click **Yes!** (It appears in the middle of the screen).



- ✓ Before moving on, please read both narratives contained in Data File 1 and Data File 2.

Exercise 4: Coding Documents

Your approach to coding (or categorising) data within NVivo 9 will be determined by your overall research approach. If you are working inductively, then it is likely that you will begin by examining the data for reoccurring themes that emerge from the data. If, however, you are adopting a deductive research approach then you may begin the analysis process with a pre-determined list of themes to be explored.

For the purpose of this user guide, we will be adopting an **inductive approach**, which will begin with a visual inspection of the data. Having read Data Files 1 and 2, you should be aware of some themes emerging from these data. For example, both narratives include references to refreshments (cups of tea), the use of music, times of the day, the venue for writing activity – make a note of these before continuing with the exercise. In this exercise, we will begin the process of coding text within NVivo 9.

Before we can begin this process, it is important to understand the term Node. A Node is a collection of references about a specific theme, place, person or other area of interest. Once sections or passages of data have been coded, NVivo ‘stores’ snapshots of these data within a Node. This facilitates the process of retrieving data, which will be explored in Exercise 7.

(Please note: Within NVivo 9, there are alternative methods of creating nodes and coding data. We will only explore a couple of these).

Types of Node available in NVivo 9 and previous versions

In previous versions of NVivo you usually decided which type of **node** was required before it was created. This was not mandatory, but the software led you towards that decision by default. For your information, the following is a brief description of the main types (and how NVivo differs from previous versions).

Free Nodes are essentially a ‘*stand alone*’ element for coding – they have no association with any other nodes. Free Nodes are the default in NVivo 9.

Tree Nodes obey a hierarchical relationship to other tree nodes (which is defined by NVivo). The arrangement is effectively the same as the familiar tree structure of folders in Windows. The relative position of Tree Nodes can be altered after creation (just as you would manipulate folders in Windows). You use tree nodes if you want to logically group nodes for easy access during coding (rather than alphabetical Free Nodes). *We will not be creating Tree Nodes in this demonstration.*

Case Nodes are nodes with user defined **attributes** such as ‘Gender’, ‘Country’, ‘Age’, etc. In previous versions you had to create and prepare a list of attributes to be used by the Case Nodes. The problem was that every Case Node had to carry all of the attributes in the project even if they were not required (so many had to be designated as ‘unassigned’). This inelegant situation is fixed in NVivo 9 which allows each Case Node to only carry the required attributes. Case nodes are particularly useful if you need to categorise your coding and ask questions later (e.g. comparing coding applied to women and men). *We will not be creating Case Nodes in this demonstration.*

This is only a cursory overview of types of node that are available, please consult http://help-nv9-en.qsrinternational.com/nv9_help.htm for more detailed information. The coding tutorial provided by QSR is particularly useful.

Exercise 4a: Creating a Node to use in the coding process

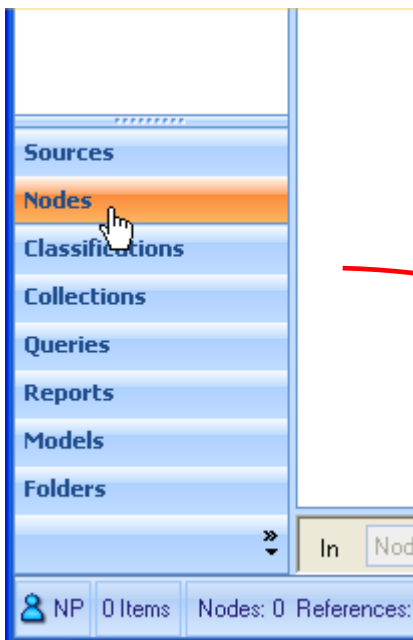
Your approach to coding (or categorising) data within NVivo 9 will be determined by your overall research approach. If you are working inductively, then it is likely that you will begin by examining the data for reoccurring themes that emerge from the data. If, however, you are adopting a deductive research approach then you may begin the analysis process with a pre-determined list of themes to be explored.

For the purpose of this user guide, we will be adopting an **inductive approach**, which will begin with a visual inspection of the data. Having read Data Files 1 and 2, you should be aware of some themes emerging from these data. For example, both narratives include references to refreshments (cups of tea), the use of music, times of the day, the venue for writing activity – make a notice of these before continuing with the exercise. In this exercise, we will begin the process of coding text within NVivo 9.

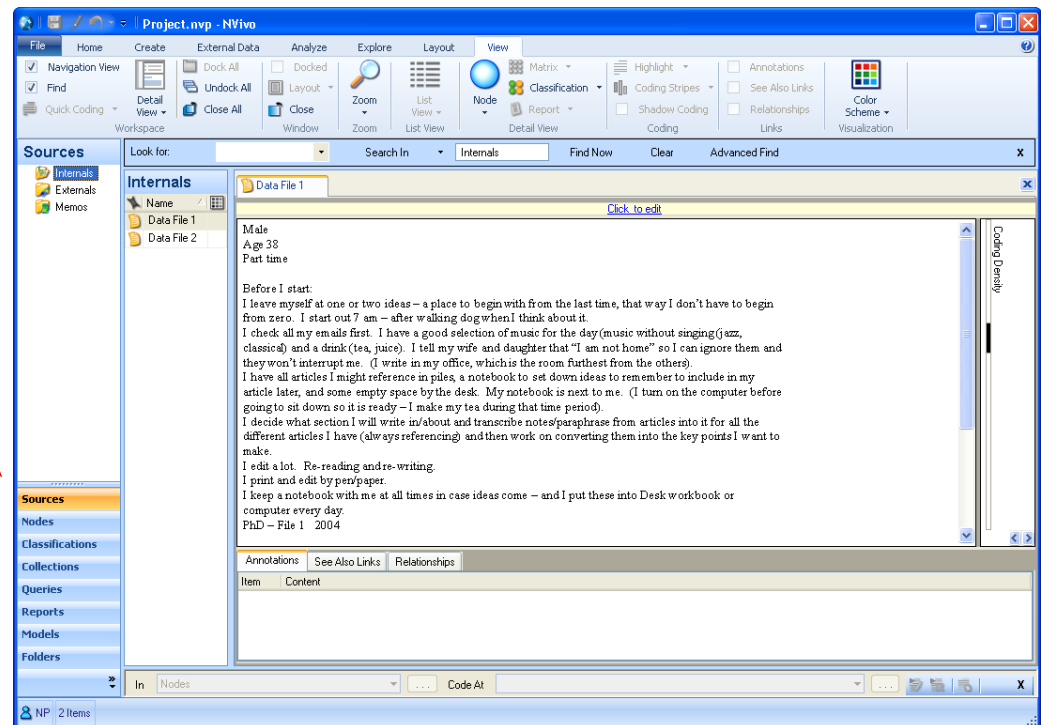
Before we can begin this process, it is important to understand the term Node. A Node is a collection of references about a specific theme, place, person or other area of interest. Once sections or passages of data have been coded, NVivo 'stores' snapshots of these data within a Node. This facilitates the process of retrieving data, which will be explored in Exercise 7.

(Please note: Within NVivo 9, there are alternative methods of creating nodes and coding data. We will only explore a couple of these).

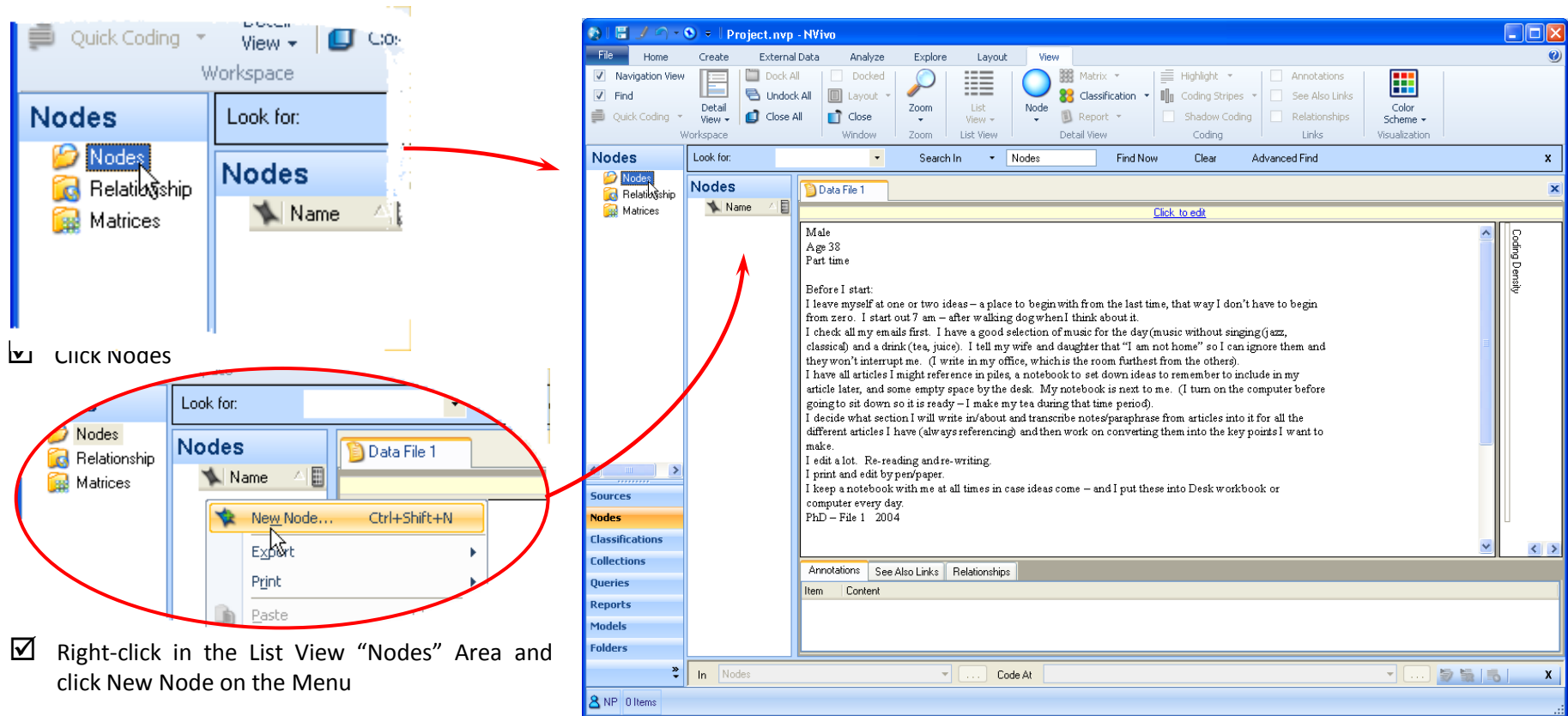
- ☒ Make sure that Data File 1 is open



- ☒ Click Nodes in the Selection Menu



Exercise 4a: Creating a Free Node to use in the coding process



Quick Coding View Workspace

Nodes

Look for:

Nodes

Name

CLICK NODES

Look for:

Nodes

Name

Data File 1

New Node... Ctrl+Shift+N

Export

Print

Paste

Right-click in the List View "Nodes" Area and click New Node on the Menu

Project.nvp - NVivo

File Home Create External Data Analyze Explore Layout View

Navigation View Find Quick Coding Detail View Workspace Dock All Undock All Close All Close Zoom Window Zoom List View List View Node Matrix Classification Highlight Coding Stripes Shadow Coding Annotations See Also Links Relationships Links Color Scheme Visualization

Nodes

Look for:

Search In Nodes Find Now Clear Advanced Find

Data File 1

Click to edit

Male
Age 38
Part time

Before I start:
I leave myself at one or two ideas – a place to begin with from the last time, that way I don't have to begin from zero. I start out 7 am – after walking dog when I think about it.
I check all my emails first. I have a good selection of music for the day (music without singing (jazz, classical) and a drink (tea, juice). I tell my wife and daughter that "I am not home" so I can ignore them and they won't interrupt me. (I write in my office, which is the room furthest from the others).
I have all articles I might reference in piles, a notebook to set down ideas to remember to include in my article later, and some empty space by the desk. My notebook is next to me. (I turn on the computer before going to sit down so it is ready – I make my tea during that time period).
I decide what section I will write in/about and transcribe notes/paraphrase from articles into it for all the different articles I have (always referencing) and then work on converting them into the key points I want to make.
I edit a lot. Re-reading and re-writing.
I print and edit by pen/paper.
I keep a notebook with me at all times in case ideas come – and I put these into Desk workbook or computer every day.
PhD – File 1 2004

Annotations See Also Links Relationships

Item Content

In Nodes Code At

NP 0 Items

New Node

General Attribute Values

Name Music

Description

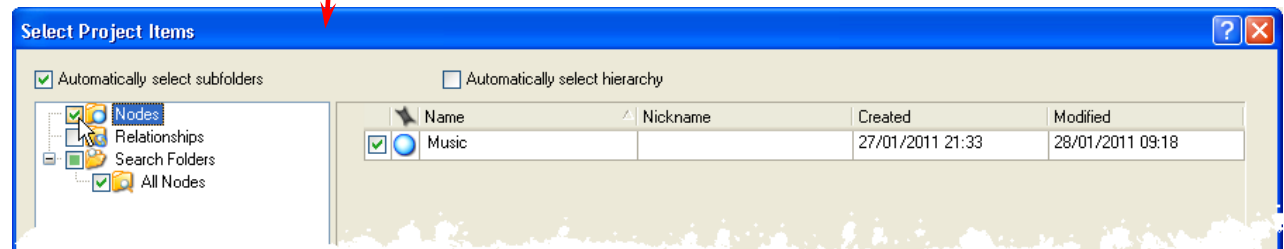
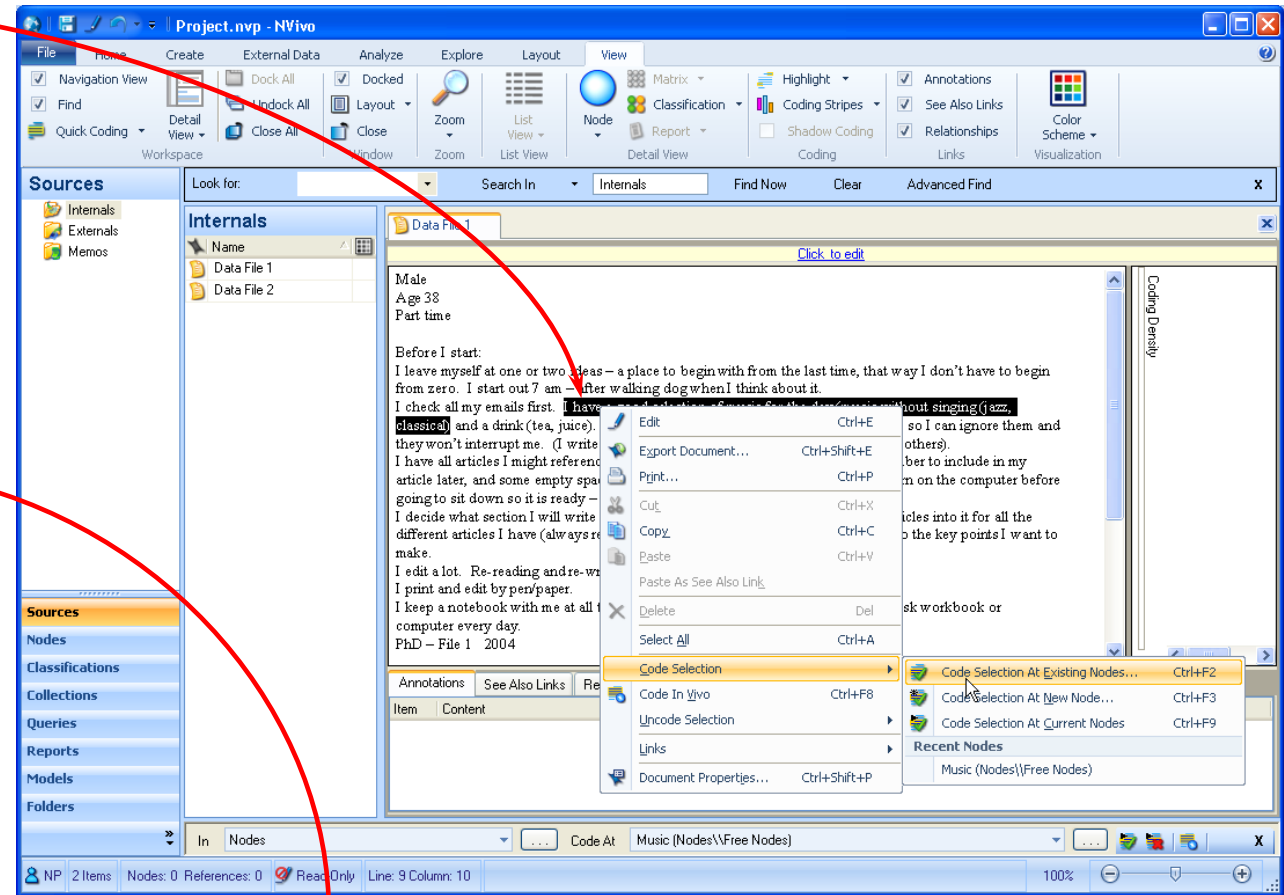
- ☒ The New Node dialog will appear. Enter "Music" in the Name Field. Further information about the meaning of the node can be added in the Description Field if desired. Click OK when finished

end of Exercise 4a

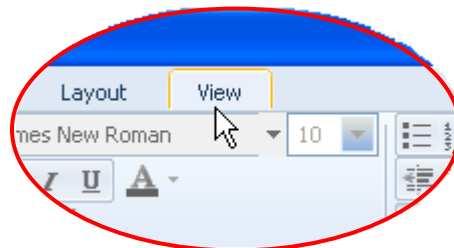
Exercise 4b: Coding using a previously created Node

Now that you have created a node, the process of coding data to this node may begin.

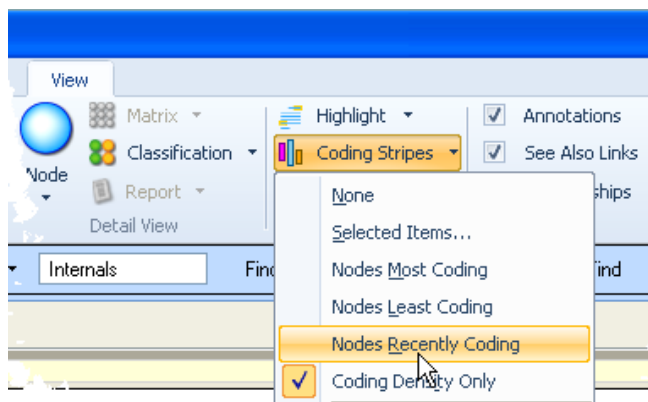
- ☑ Start by highlighting the passage *"I have a good selection of music for the day (music without singing (jazz, classical))"*.
- ☑ Right-click the highlighted text and select **Code Selection** from the drop-down menu, and then click on **Code Selection at Existing Nodes**.
- ☑ **Select Project Items** appears as a pop-up dialog for choosing the required Node (the view only shows one node to select here, but normally there would be a list of all the nodes you have created or imported from another project). Tick '**Music**' and then click **OK**.
- ☑ NVivo 9 handles **Nodes** slightly differently to previous versions of the software. All Nodes are effectively **Free Nodes** by default (when you create them) and they can be configured later into **Tree Nodes** or have attributes added to make them **Case Nodes**. You do not have to decide on their 'type' before they are created. They are located in the general **Nodes Folder** until you decide to move them.



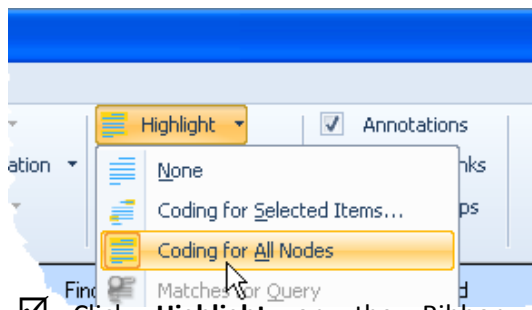
Exercise 4b: Coding using a previously created Node



- ✓ Click View in the Command Menu

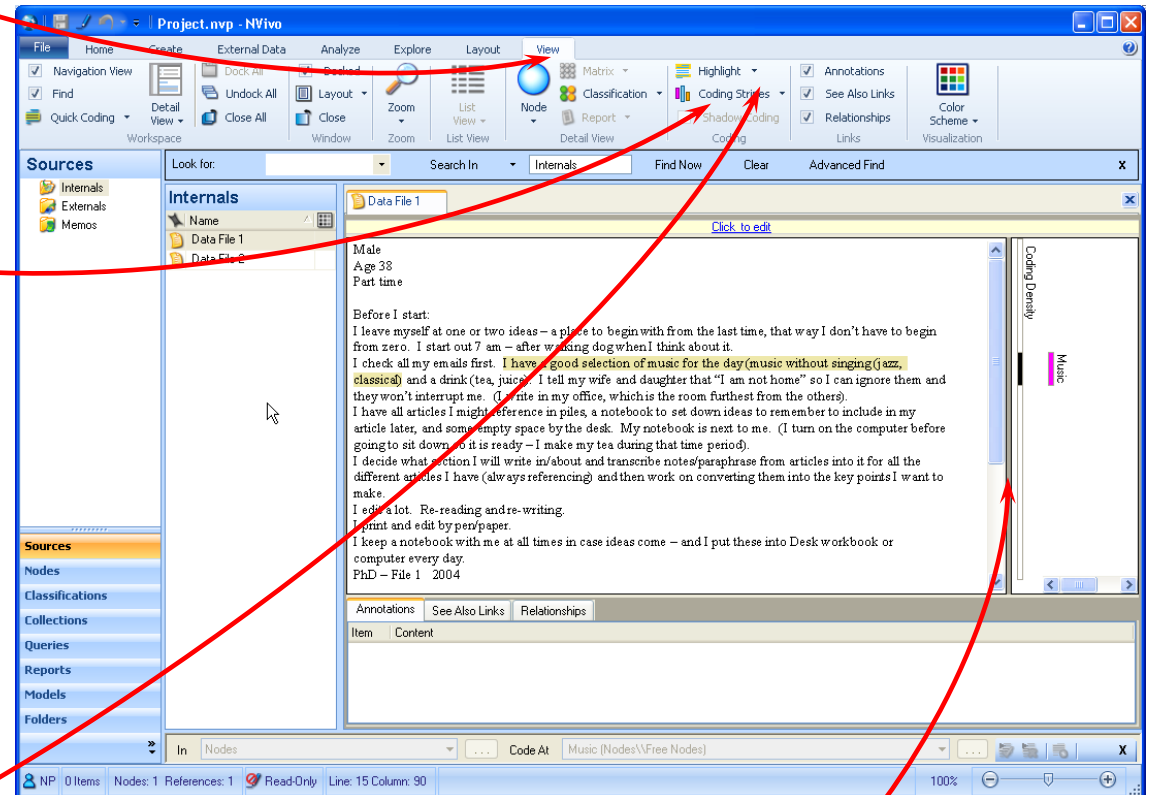


- ✓ Click **Coding Stripes** on the Ribbon, and select **Nodes Recently Coding** on the menu.



- ✓ Click **Highlight** on the Ribbon, and select **Coding for All Nodes** on the drop-down menu.

The highlighted text is now coded against the Free Node “Music”. To be able to see the code we need to adjust the workspace. Note that a coding is indicated by a vertical black marker in the **Coding Density** line to the right of the narrative. To see a specific marker for the Free Node “Music” we can make an adjustment to coding stripes. **Coding Stripes** provide a useful visual indication of the codes that have been applied to a document.



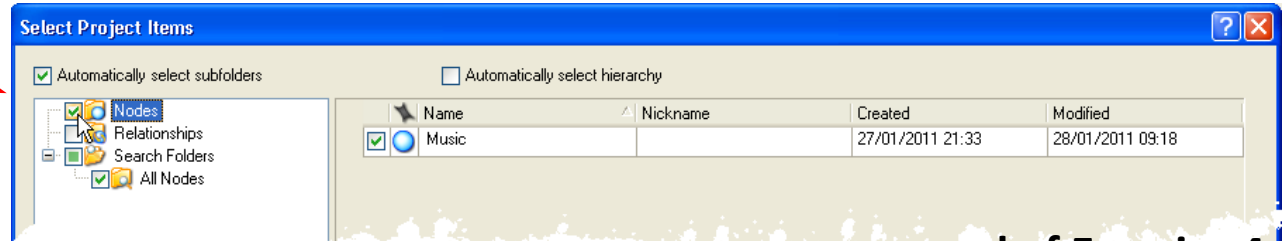
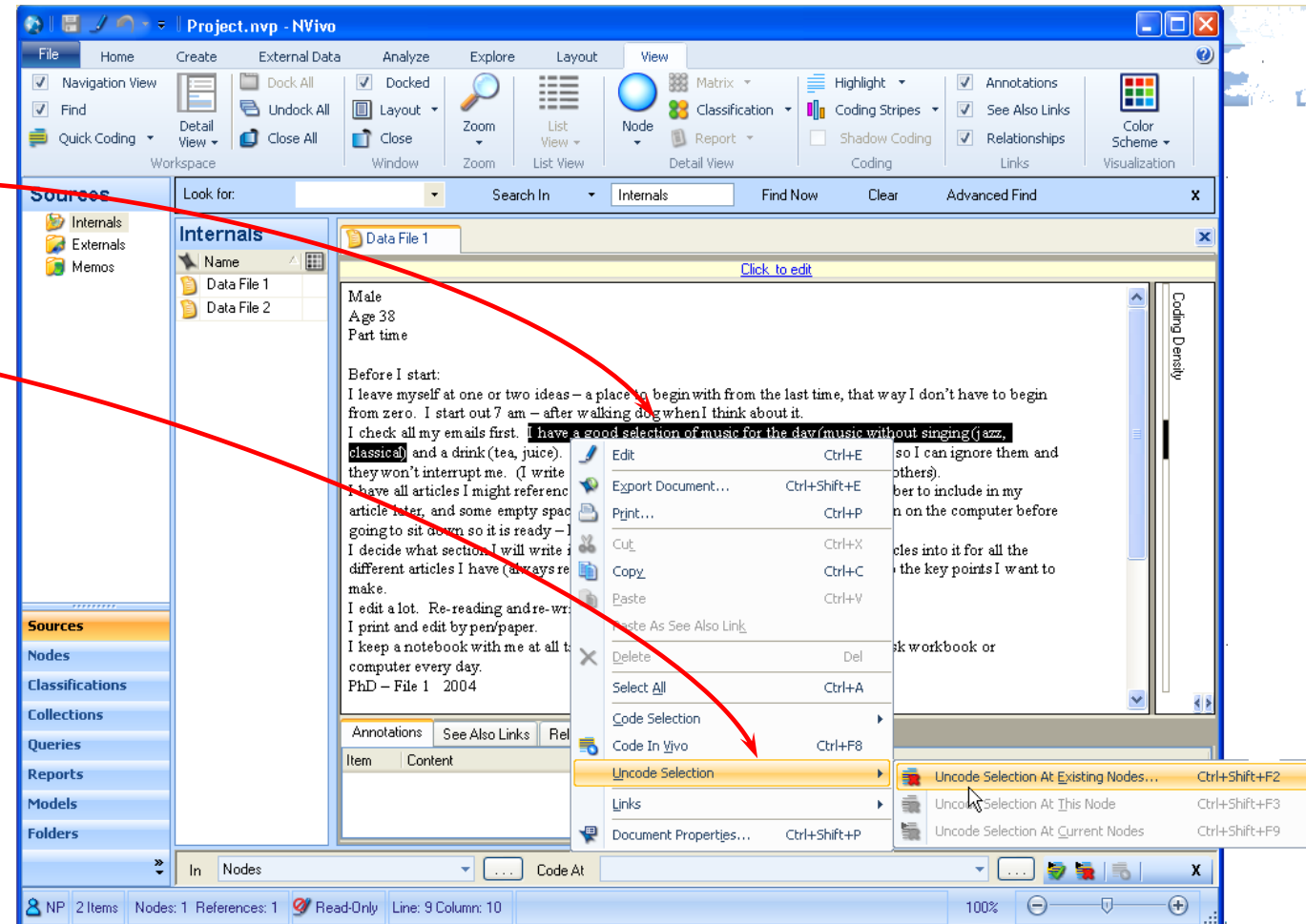
- ✓ If necessary, increase the width of the **Coding Stripes** pane, by clicking on its left hand boundary and dragging it to the left.

end of Exercise 4b

Exercise 4c: Un-coding some (or all) of your work

If at any time you change your mind about the application of a code, or make a mistake in applying a code, text can be 'uncoded' very simply.

- ✓ Highlight the section of text that you wish to remove the coding from (for example, the text currently coded at the **Music** Node).
- ✓ Right-click the highlighted text and select **Uncode Selection** from the Drop-down Menu, and then click on **Uncode Selection at Existing Nodes**.
- ✓ **Select Project Items** appears as a pop-up dialog for choosing the required Node (the view only shows one node to select here, but normally there would be a list of all the nodes you have created or imported from another project). Tick Music and then click OK.



end of Exercise 4c

Exercise 4d: Viewing coding activity using coding stripes

As you have already seen, **Coding Stripes** provide a useful visual indication of the codes that have been applied to a document. The coloured **Coding Stripes** provide an indication of which sections of text have been coded, and the nodes used. We will now use the **Ribbon Shortcut Method** to reconfigure the workspace. Pressing and holding the Alt key makes a set of letters appear on the ribbon. Pressing subsequent key letters is the same as clicking the menu with the mouse. This method is much faster than moving the cursor around the screen.

- ✓ Use the *Ribbon Shortcut Method*, and hold the **Alt** Key for two seconds and then type **W, E, R**. (This ensures that the detail view is set at the right of the list view).

W view

E detail View

R Right

- ✓ Use the *Ribbon Shortcut Method* again, and hold the **Alt** Key for two seconds and then type **W, S, R**. (This displays the most recent coding as stripes).

W view

S coding Stripes

R nodes Recently coded

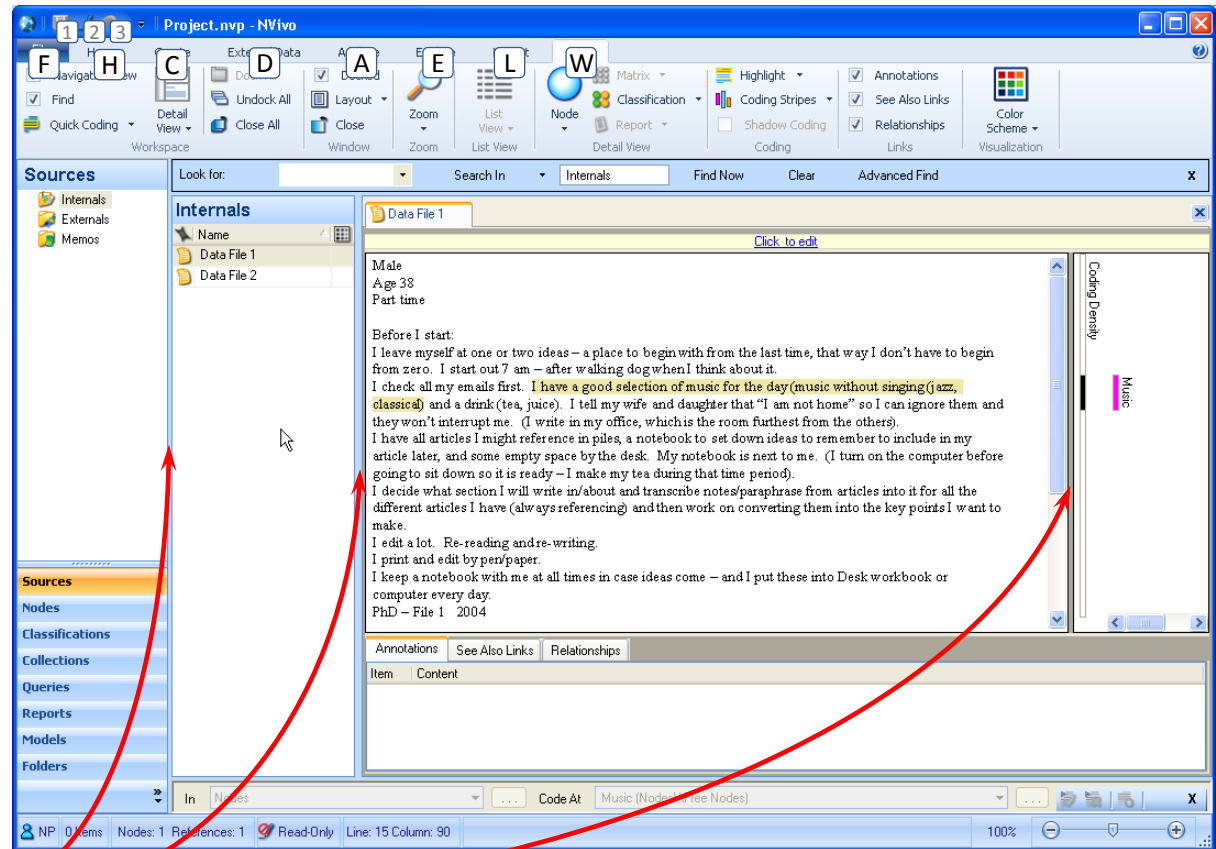
- ✓ Use the *Ribbon Shortcut Method* one more time, and hold the **Alt** Key for two seconds and then type **W, H, A**. (This displays the coded text as a yellow highlight).

W view

H Highlight

A coding for **All** nodes

- ✓ Increase the width of the entire **Coding Stripes Window** pane, by clicking on the left hand edge and dragging it to the left. Move the other section boundaries by 'click and drag' so that you can see the screen as shown here.



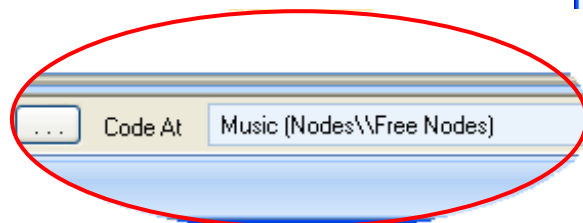
Leave your screen in this format, with the **Coding Stripes** displayed, as you undertake the next exercise.

end of Exercise 4d

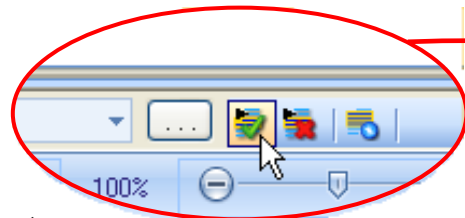
Exercise 4e: Using the Speed Coding Bar to Code /Un-code data

The **Speed Coding Bar** (shown below), accessed from within the **View** menu, is a particularly efficient tool for undertaking coding because it reduces the number of mouse clicks needed to code. You will have noticed that the menu at the bottom of the screen now contains the nodes created earlier.

- ✓ Highlight the relevant passage of text within the document (as you did in Exercise 4b above).



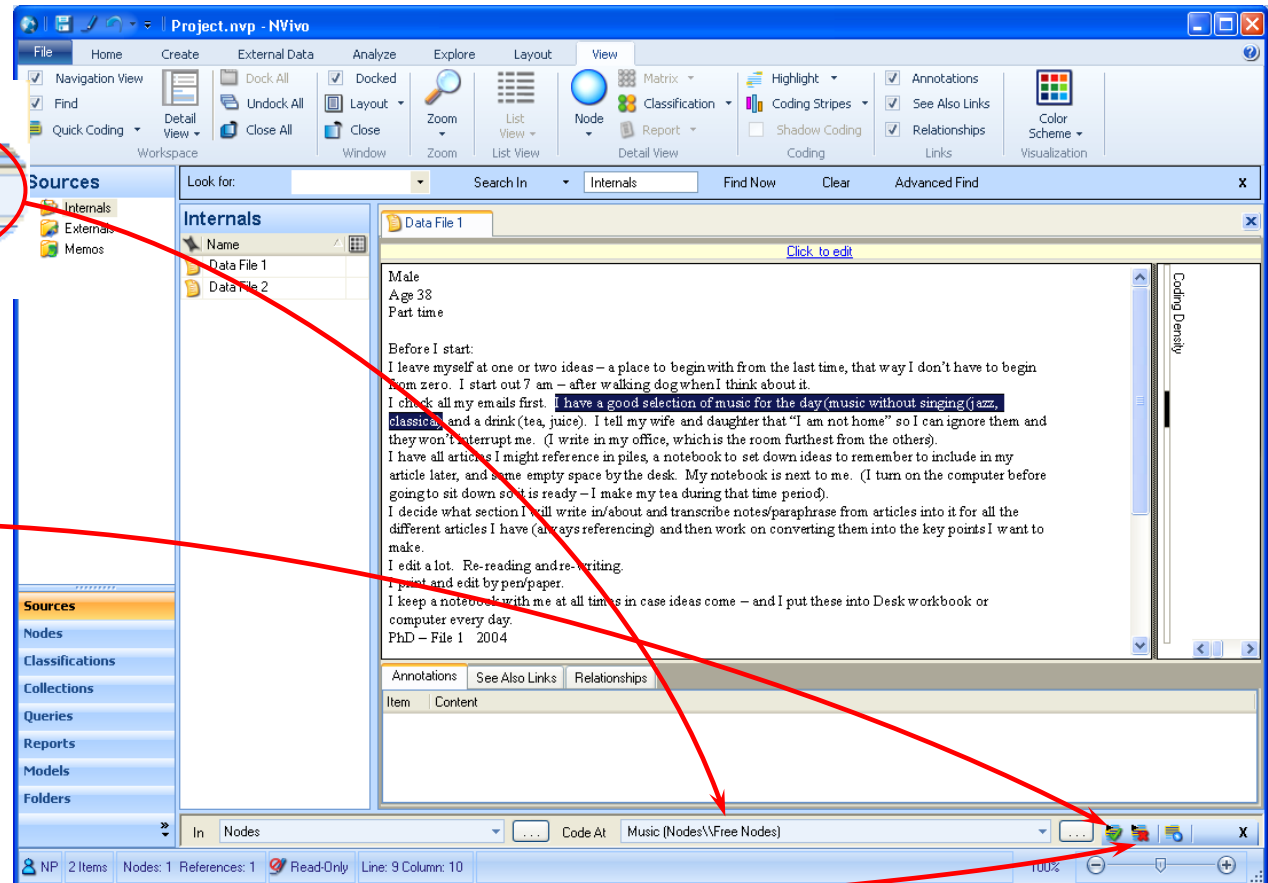
- ✓ Drop the menu within the **Speed Coding Bar** to display the list of nodes (make your selection by clicking on the appropriate node ... in this case 'Music').



- ✓ To code click on the green **Code** button in the **Speed Coding Bar**. (Note: A new Coding Stripe will have been created in the right hand Stripes View.)



- ✓ To remove a code, do as above, but click on the red **UnCode** button (Note: The Coding Stripe will no longer be visible for this section of text). Try un-coding 'Music' and then recode it before proceeding.



end of Exercise 4e

Exercise 4f: Creating a Free Node using the Quick Coding Bar

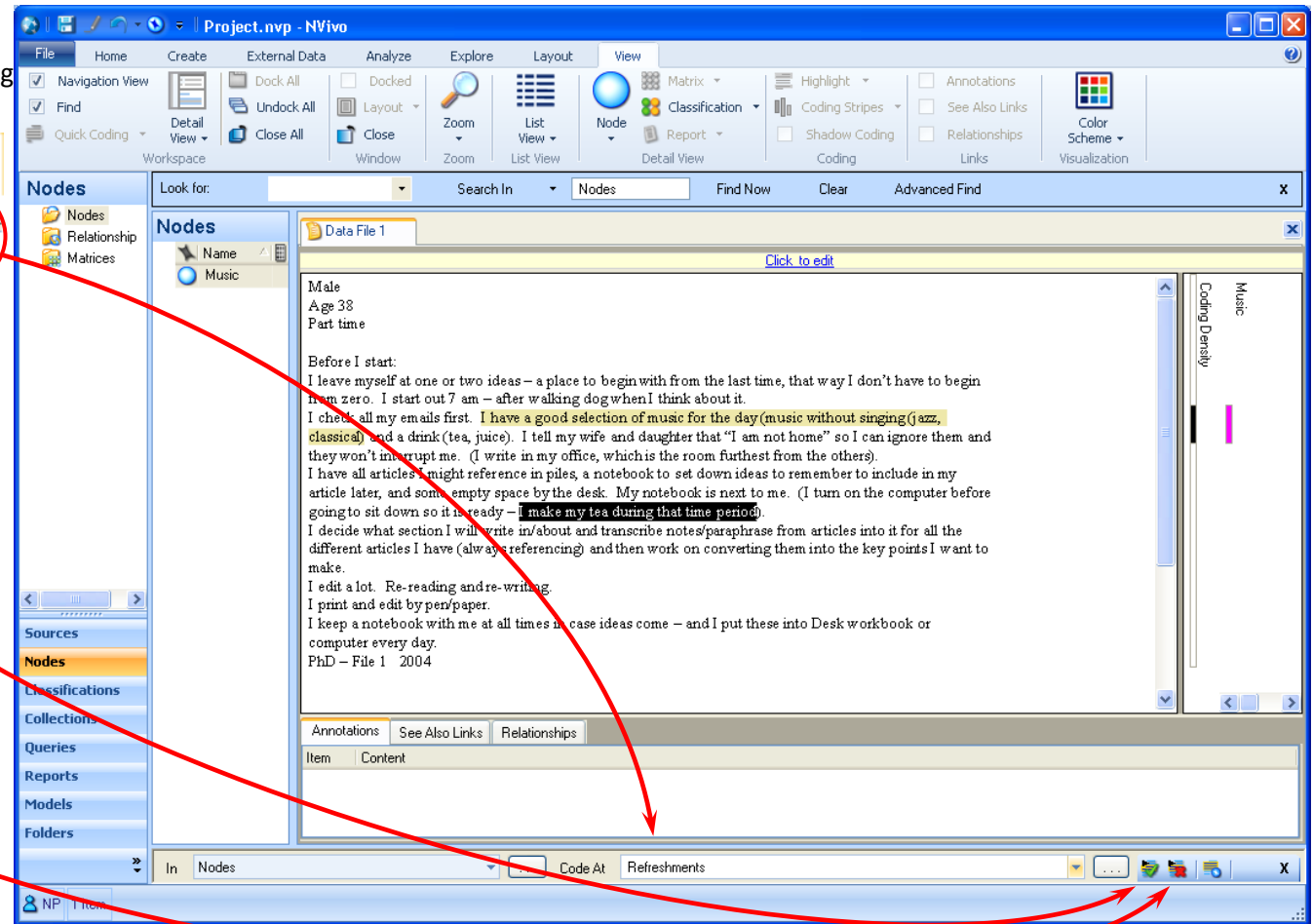
The **Quick Coding Bar** can also be used for the creation of nodes. This is the quickest and simplest way to create new nodes (using the least number of clicks) during the coding process. We will now create a node which will be used to code comments relating to refreshments.

- ✓ Highlight the text “(I turn on the computer before going to sit down so it is ready – I make my tea during that time period)”

- ✓ Highlight any text in the ‘Code At’ Box and overwrite with the word ‘Refreshments’.

- ✓ Click the green **Code** Button.

- ✓ As before, un-coding can be accomplished by clicking the red **Uncode** Button.



end of Exercise 4f

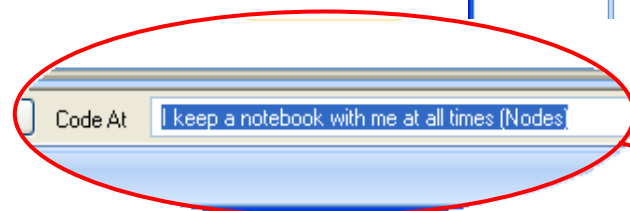
Exercise 4g: Using the *In-Vivo* function on the Quick Coding Bar

Alternatively, the **In-Vivo** function can be used to create a node and apply coding, if you wish to use an informant's own words as the title for the Node.

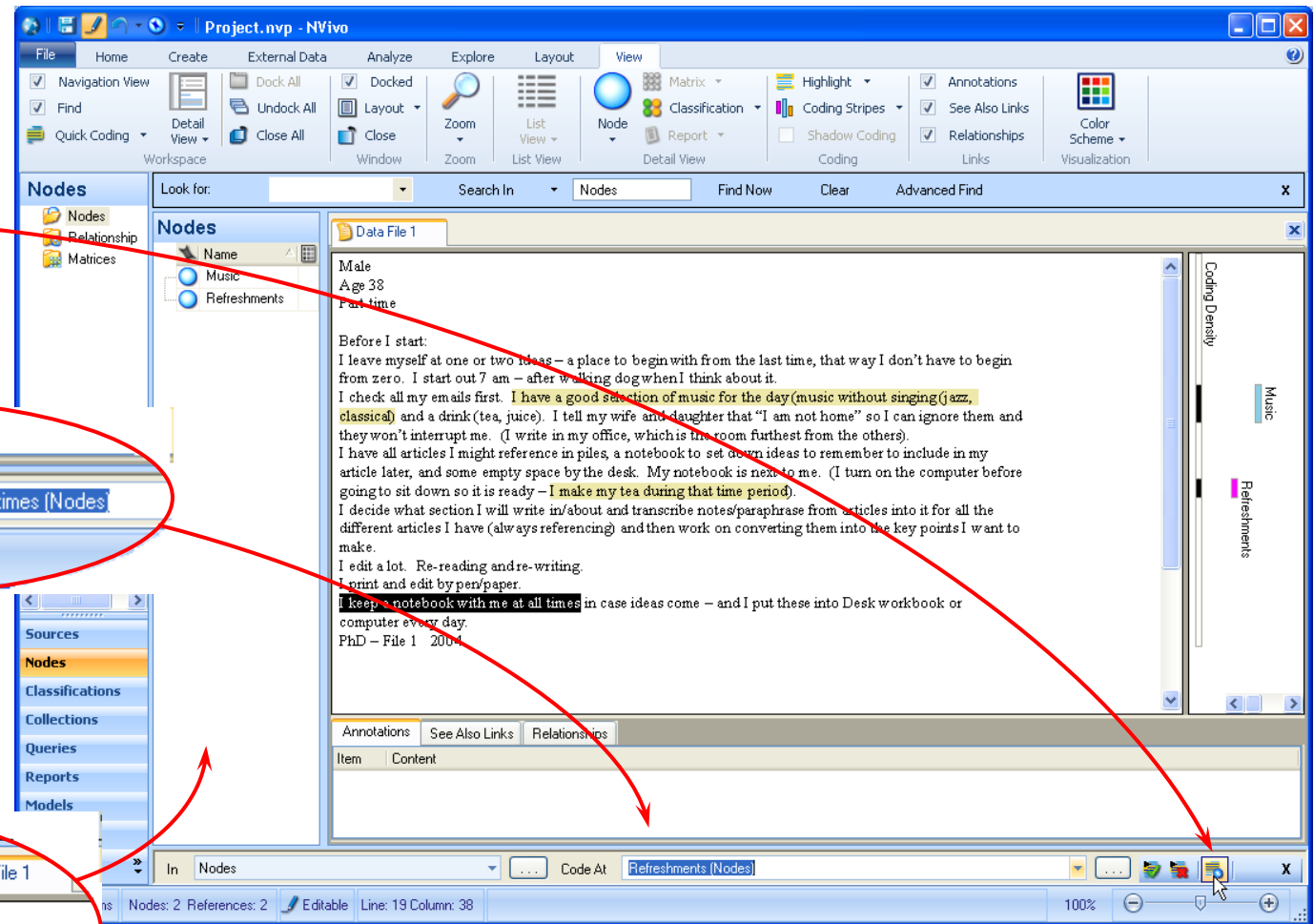
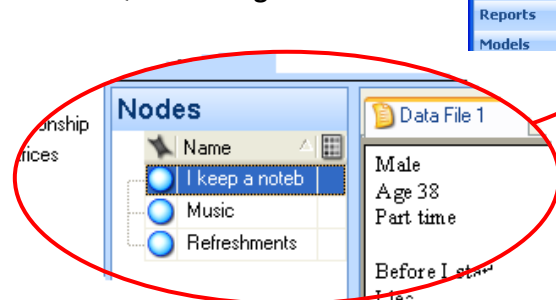
- ✓ Highlight the relevant passage of text within the document (shown black).



- ✓ Click on the **In-Vivo** button in the right of the **Quick Coding Bar**.



- ✓ You will see that the node is created automatically, with the selected text as the title appearing in the text box on the **Quick Coding Bar**.

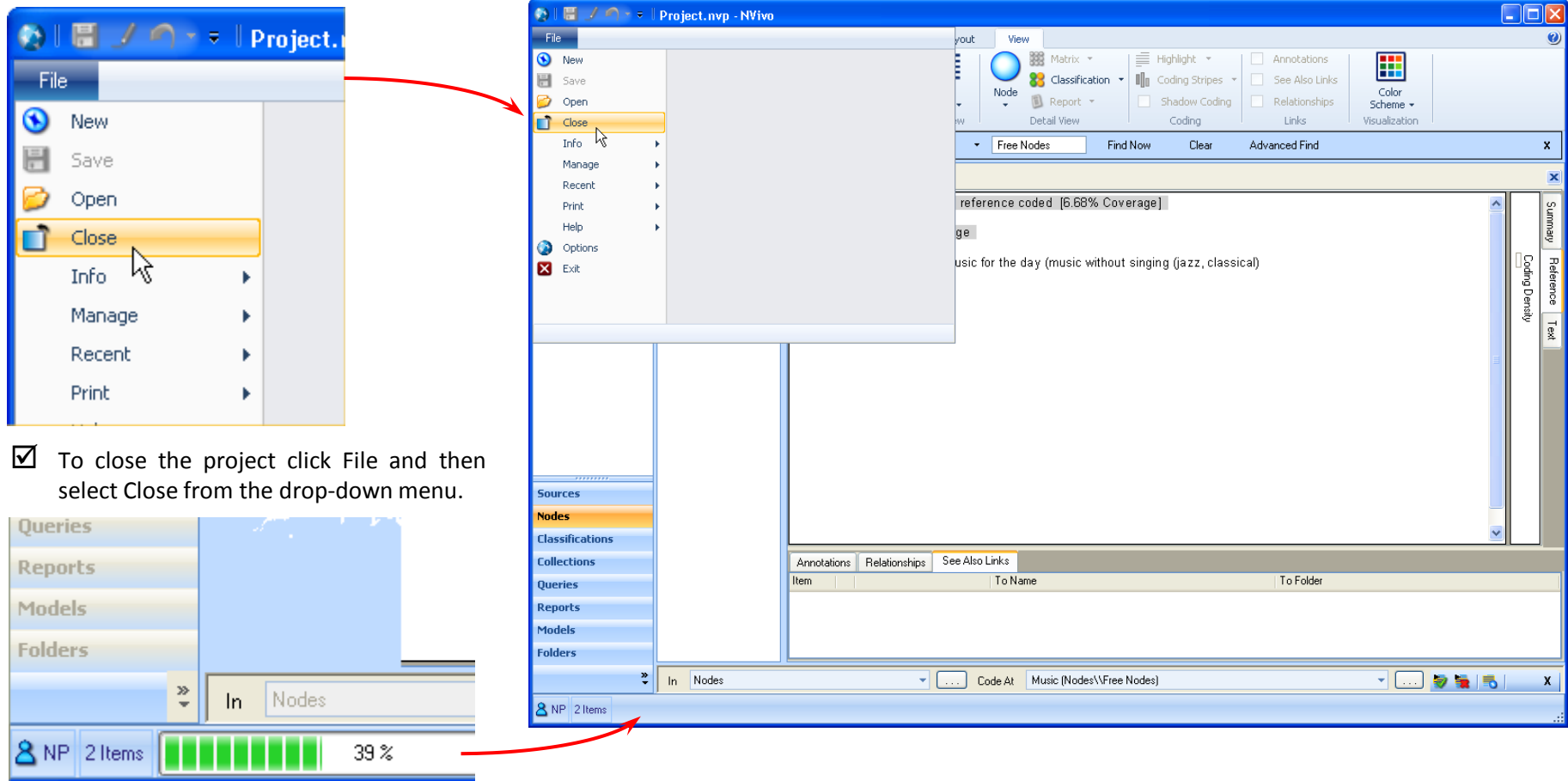


The new node will now appear in the **Nodes List View**.

end of Exercise 4g

Exercise 5: Closing a Project in NVivo 9

Before you commence Exercise 6, you will need to close Project 1 and open Project 2.



- ☒ To close the project click File and then select Close from the drop-down menu.

- ☒ Make sure that you allow the Shut Down Progress Meter to complete before doing anything else.
- ☒ Now open Project 2 from the Project / Welcome Screen.

Exercise 6: Revision Exercise – Browsing Nodes

You should now have Project 2 open in NVivo. Project 2 contains 10 data files in total, including the 2 data files that you have been using in earlier exercises. These 10 data files have already been coded as Nodes.

- ☑ Reconfigure the workspace again using the Ribbon Shortcut Method (shown in Section 4). Hold the **Alt** key for two seconds and then press **W**, **E**, and **R**.

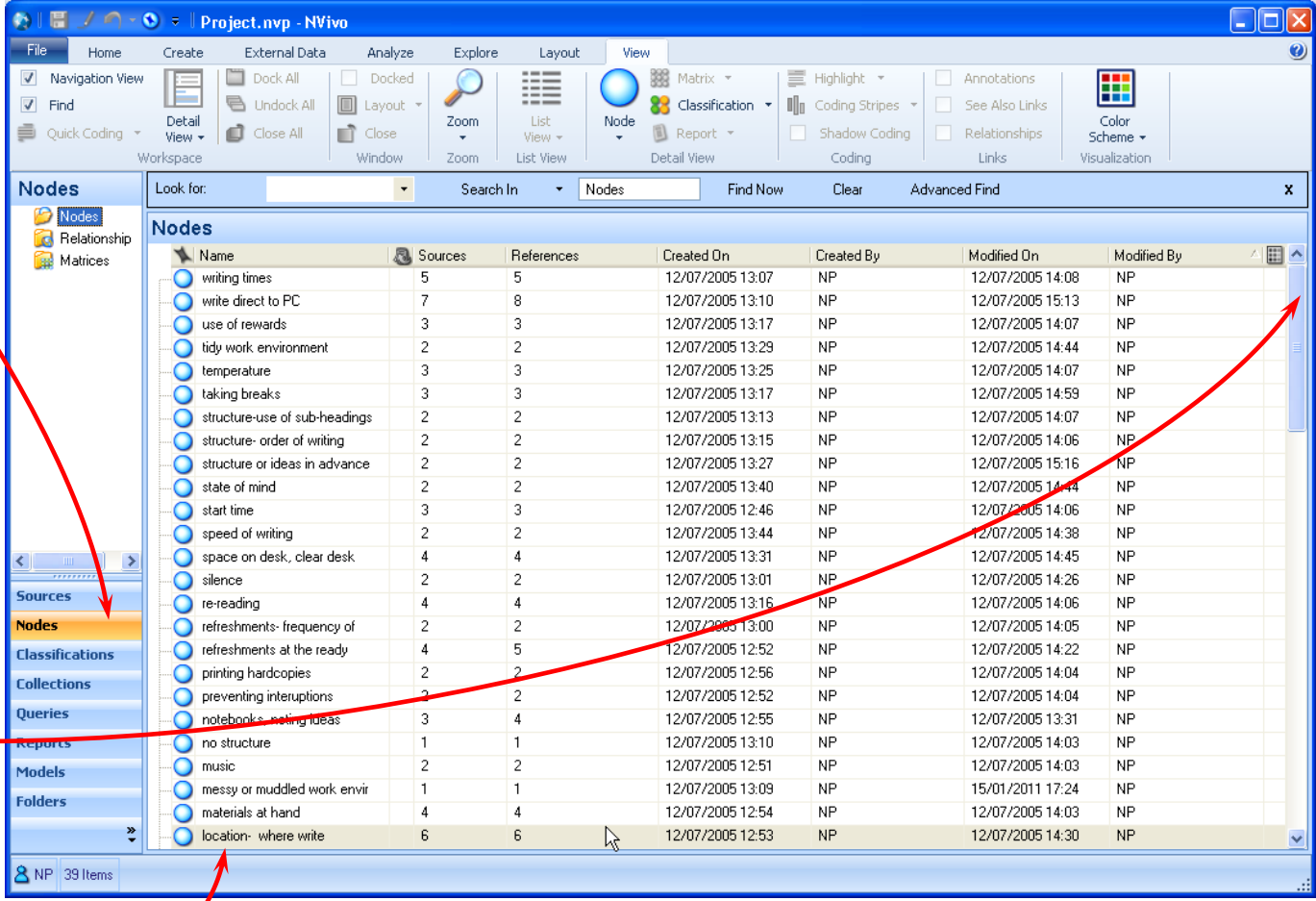
W view
E dEtail View
R Right

The **List View** of **Internals** shows the ten files. The **Nodes** column indicates how many different nodes have been used in coding each file. The **References** column shows how many separate portions of text have been coded. So Data File Ten has nine references using nine different nodes (i.e. one coded reference per node); whereas Data File 1 has 17 coding references using 15 different nodes (so at least one node has been used more than once in Data File 1).

Name	Nodes	References	Created On	Created By	Modified On	Modified By
Data File 1	15	17	12/07/2005 12	NP	12/07/2005 1	NP
Data File 10	9	9	12/07/2005 12	NP	12/07/2005 1	NP
Data File 2	12	13	12/07/2005 12	NP	12/07/2005 1	NP
Data File 3	14	14	12/07/2005 12	NP	12/07/2005 1	NP
Data File 4	7	8	12/07/2005 12	NP	12/07/2005 1	NP
Data File 5	9	9	12/07/2005 12	NP	12/07/2005 1	NP
Data File 6	12	12	12/07/2005 12	NP	12/07/2005 1	NP
Data File 7	4	4	12/07/2005 12	NP	12/07/2005 1	NP
Data File 8	11	12	12/07/2005 12	NP	12/07/2005 1	NP
Data File 9	9	9	12/07/2005 12	NP	12/07/2005 1	NP

Exercise 6: Revision Exercise

Now open the **Nodes Detail View**, to view the list of nodes created, as illustrated below. Scroll down vertically to see the full list. A total of 39 Nodes have been created within this project as a whole.



☒ Select **Nodes** in the Selection Menu.

☒ Use the vertical scroll bar to move down the list of nodes that have been coded.

☒ Find and highlight the entry in the list "**location – where write**"

Name	Sources	References	Created On	Created By	Modified On	Modified By
writing times	5	5	12/07/2005 13:07	NP	12/07/2005 14:08	NP
write direct to PC	7	8	12/07/2005 13:10	NP	12/07/2005 15:13	NP
use of rewards	3	3	12/07/2005 13:17	NP	12/07/2005 14:07	NP
tidy work environment	2	2	12/07/2005 13:29	NP	12/07/2005 14:44	NP
temperature	3	3	12/07/2005 13:25	NP	12/07/2005 14:07	NP
taking breaks	3	3	12/07/2005 13:17	NP	12/07/2005 14:59	NP
structure-use of sub-headings	2	2	12/07/2005 13:13	NP	12/07/2005 14:07	NP
structure- order of writing	2	2	12/07/2005 13:15	NP	12/07/2005 14:06	NP
structure or ideas in advance	2	2	12/07/2005 13:27	NP	12/07/2005 15:16	NP
state of mind	2	2	12/07/2005 13:40	NP	12/07/2005 14:44	NP
start time	3	3	12/07/2005 12:46	NP	12/07/2005 14:06	NP
speed of writing	2	2	12/07/2005 13:44	NP	12/07/2005 14:38	NP
space on desk, clear desk	4	4	12/07/2005 13:31	NP	12/07/2005 14:45	NP
silence	2	2	12/07/2005 13:01	NP	12/07/2005 14:26	NP
re-reading	4	4	12/07/2005 13:16	NP	12/07/2005 14:06	NP
refreshments- frequency of	2	2	12/07/2005 13:00	NP	12/07/2005 14:05	NP
refreshments at the ready	4	5	12/07/2005 12:52	NP	12/07/2005 14:22	NP
printing hardcopies	2	2	12/07/2005 12:56	NP	12/07/2005 14:04	NP
preventing interruptions	2	2	12/07/2005 12:52	NP	12/07/2005 14:04	NP
notebooks- noting ideas	3	4	12/07/2005 12:55	NP	12/07/2005 13:31	NP
no structure	1	1	12/07/2005 13:10	NP	12/07/2005 14:03	NP
music	2	2	12/07/2005 12:51	NP	12/07/2005 14:03	NP
messy or muddled work enviro	1	1	12/07/2005 13:09	NP	15/01/2011 17:24	NP
materials at hand	4	4	12/07/2005 12:54	NP	12/07/2005 14:03	NP
location- where write	6	6	12/07/2005 12:53	NP	12/07/2005 14:30	NP

end of Exercise 6

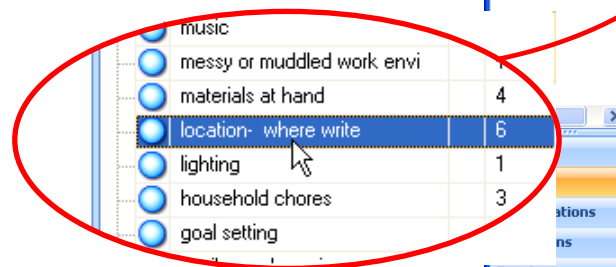
Exercise 7: Exploring and Browsing Nodes

- ☑ Reconfigure the workspace as before, using the keyboard shortcut, but this time **Alt** (2 secs) followed by the **W**, **E**, and **B** key sequence. This will place the Detail View (when it opens) beneath the Nodes List, instead of to the right.

W= view

E= dEtail view

B= Bottom



- ☑ Use the Detail View Scroll Bar (at right) to scroll through the list of Nodes, until you can see the node '**Location – where write**' and then double click on the selection.

The screenshot shows the NVivo workspace with the 'Nodes' list on the left and the 'Detail View' for the 'location- where write' node on the right. The 'Detail View' displays a table of coded references for this node.

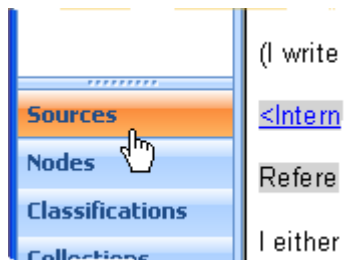
Name	Sources	References	Created On	Created By	Modified On	Modified By
messy or muddled work env	1	1	12/07/2005 13:09	NP	15/01/2011 17:24	NP
materials at hand	4	4	12/07/2005 12:54	NP	12/07/2005 14:03	NP
location- where write	6	6	12/07/2005 12:53	NP	12/07/2005 14:30	NP
lighting	1	1	12/07/2005 13:25	NP	15/01/2011 17:24	NP
household chores	3	4	12/07/2005 13:05	NP	12/07/2005 14:02	NP
goal setting	1	1	12/07/2005 13:22	NP	12/07/2005 14:02	NP
familiar work environment	1	1	12/07/2005 13:34	NP	12/07/2005 14:02	NP
ending a session	2	2	12/07/2005 13:19	NP	12/07/2005 14:02	NP
editing	3	3	12/07/2005 12:55	NP	12/07/2005 14:01	NP
duration of writing session	2	2	12/07/2005 13:43	NP	12/07/2005 14:42	NP
dress	1	1	12/07/2005 12:58	NP	12/07/2005 14:01	NP
dog walking prior to start	2	2	12/07/2005 12:49	NP	12/07/2005 15:01	NP
distractions	3	3	12/07/2005 13:20	NP	12/07/2005 14:40	NP
comfort	2	2	12/07/2005 12:59	NP	12/07/2005 14:00	NP
checking emails, voice mail et	4	4	12/07/2005 12:49	NP	12/07/2005 15:00	NP
calm but not noiseless	1	1	12/07/2005 13:01	NP	12/07/2005 14:37	NP
blank screens- preventing, ha	3	4	12/07/2005 13:38	NP	12/07/2005 14:43	NP

The NVivo workspace will now change to show you all the coded references that have used the '**Location – where write**' node (see next page).

Exercise 7: Exploring and Browsing Nodes

- ☒ You can use the **Detail View Vertical Scroll Bar** to examine the coded references that have already been applied using this node.

In the Detail View, the Sources that have had this particular **Node** applied are listed alphabetically (in blue **Source Headings**). If the node has been used more than once, each instance will be listed under the Source Heading as Reference 1, Reference 2, etc. (Please ignore the % coverage shown in brackets – this is not normally used by researchers, but has been retained for NVivo project management reasons).



- ☒ When you have finished examining the node, click **Sources** in the Selection Menu.

Name	Sources	Referen	Created	Created By	Modified On	Modified By
messy	1	1	12/07/2	NP	15/01/2011 17:24	NP
material	4	4	12/07/2	NP	12/07/2005 14:08	NP
location	6	6	12/07/2	NP	12/07/2005 14:30	NP
lighting	1	1	12/07/2	NP	15/01/2011 17:24	NP
househ	3	4	12/07/2	NP	12/07/2005 14:02	NP
goal set	1	1	12/07/2	NP	12/07/2005 14:02	NP
familiar	1	1	12/07/2	NP	12/07/2005 14:02	NP

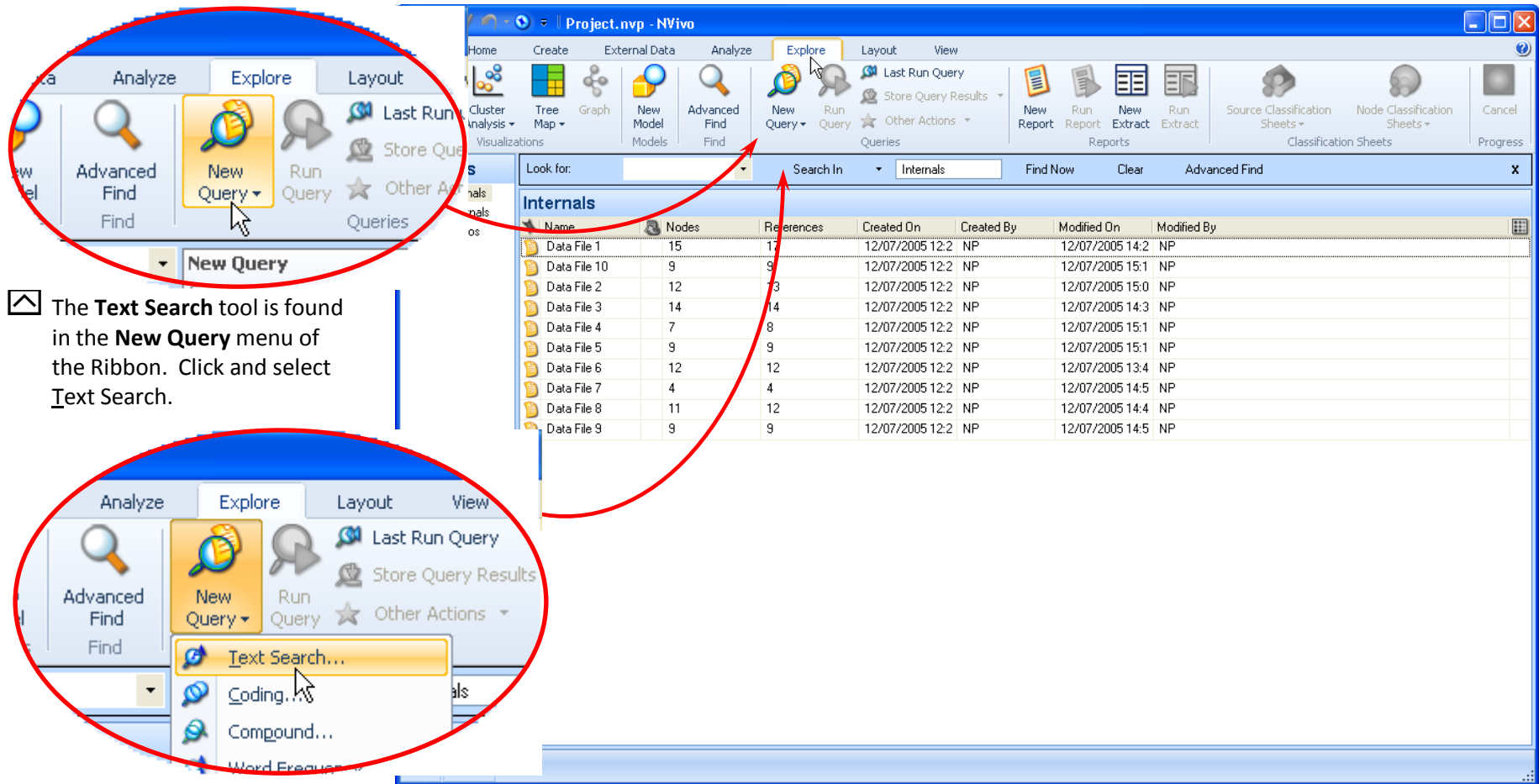
- ☒ Close the Detail View by right clicking the **Tab** and selecting **Close**.

Note: It is important to realise that the coded fragments listed in the Detail View are not separate sources in their own right, but rather '*a filtered view of the underlying source document*'.

end of Exercise 7

Exercise 8: Using the Search Function

The **Text Search** tool in NVivo provides an easy way of finding a particular section of text in your documents. If, for example, you recall that an informant used a particular phrase, but cannot remember which informant or where, this is the quickest way to locate the words. Or, if you wish to discover which/how many informants have used a particular term, the Search tool is perhaps the simplest method.



☑ The **Text Search** tool is found in the **New Query** menu of the Ribbon. Click and select **Text Search**.

☑ Click and select **Text Search**.

Exercise 8: Using the Search Function

The left screenshot shows the 'Text Search Query' dialog box. The 'Search for' field contains the text 'I am not home'. The 'Finding matches' section is set to 'Exact'. The 'Search in' field is set to 'Text'. The 'Of' field is set to 'All Sources'. The 'Where' field is set to 'Created or Modified by'. The 'Run' button is highlighted with a red box.

The right screenshot shows the NVivo 9 interface. The 'Sources' list on the left shows 'Data File 1' selected. The main window displays the search results for 'I am not home' in a text document. The search results are highlighted in yellow. The search results show the following text:

Male
Age 38
Part time

Before I start:
I leave myself at one or two ideas – a place to begin with from the last time, that way I don't have to begin from zero. I start out 7 am – after walking dog when I think about it. I check all my emails first. I have a good selection of music for the day (music without singing (jazz, classical) and a drink (tea, juice). I tell my wife and daughter that "I am not home" so I can ignore them and they won't interrupt me. (I write in my office, which is the room furthest from the others).

I have all articles I might reference in piles, a notebook to set down ideas to remember to include in my article later, and some empty space by the desk. My notebook is next to me. (I turn on the computer before going to sit down so it is ready – I make my tea during that time period).

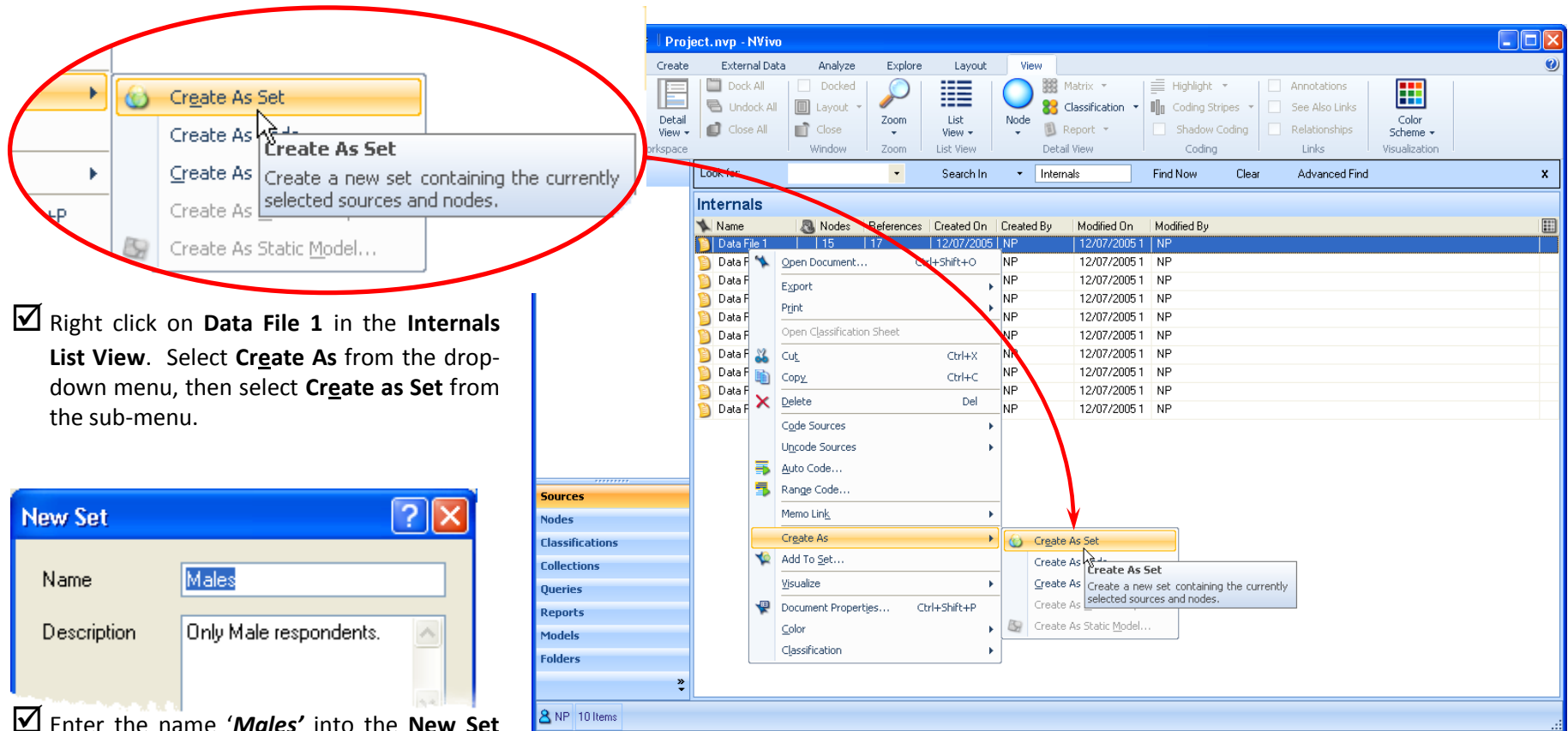
I decide what section I will write in/about and transcribe notes/paraphrase from articles into it for all the different articles I have (always referencing) and then work on

- ☑ Type the phrase that you wish to search for in the **Search for this text** box. Enter "I am not home" in the text box as shown.
- ☑ Now click on **Run** in the at the bottom of the dialog. Once the search is completed you will see the screen above. The search result shows that 1 passage has been found in 1 document. This document has been opened by NVivo 9 in the Detail View with the search phrase highlighted in yellow. You will remember that the comment "I am not home" was made by the informant in **Data File 1**. (We used this phrase to demonstrate **In-Vivo** coding in **Exercise 4**). If this phrase had been used by multiple informants, or on multiple occasions by a single informant, the search results would locate *all* instances of its use. If more documents were found they would be available as **Tabs** at the top of the Detail View (only one is shown in this example).
Please Note: As you will have noticed, there are a numerous search options available, including a range of advanced search functions. You may like to explore some of these other possibilities before moving on to the next exercise).

end of Exercise 8

Exercise 9: Creating and Using Sets

Sets of documents (or nodes) can be created in NVivo, and, depending on your research objectives and the scale of the project, this can be an extremely useful feature. A **Set** is created to identify a group of documents (or nodes), and can be explored or manipulated in the same way as any individual document/node or all documents/nodes within the project. Therefore, rather than working with the entirety of your data, a **Set** of documents (or nodes) of interest can become the focus of your analysis.



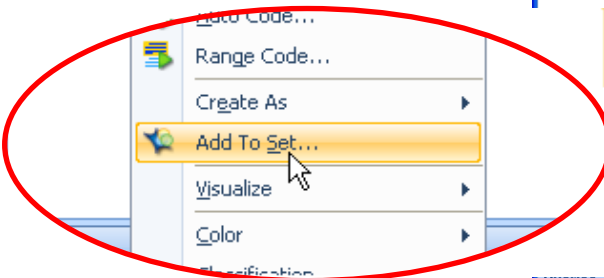
The screenshot shows the NVivo interface with the 'Internals' list view. A red circle highlights the 'Create As Set' option in the context menu for 'Data File 1'. A red arrow points from this menu to the 'New Set' dialog box, which is open. The dialog box has a 'Name' field with 'Males' entered and a 'Description' field with 'Only Male respondents.' entered. The 'New Set' dialog box also has a 'Description' field with the text 'Only Male respondents.'

Step 1: Right click on **Data File 1** in the **Internals List View**. Select **Create As** from the drop-down menu, then select **Create as Set** from the sub-menu.

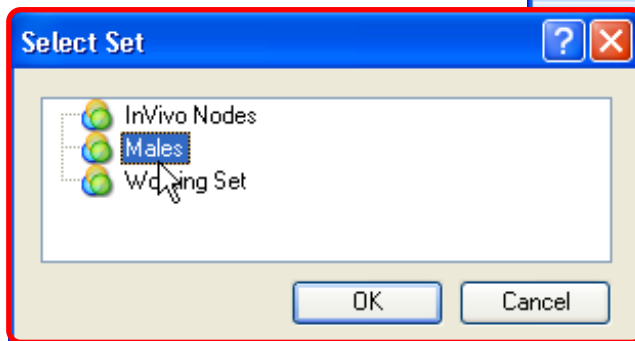
Step 2: Enter the name '**Males**' into the **New Set** pop-up dialog. You can also enter a description of the set if you wish. Click **OK** to finish.

Exercise 9: Adding to an existing Set

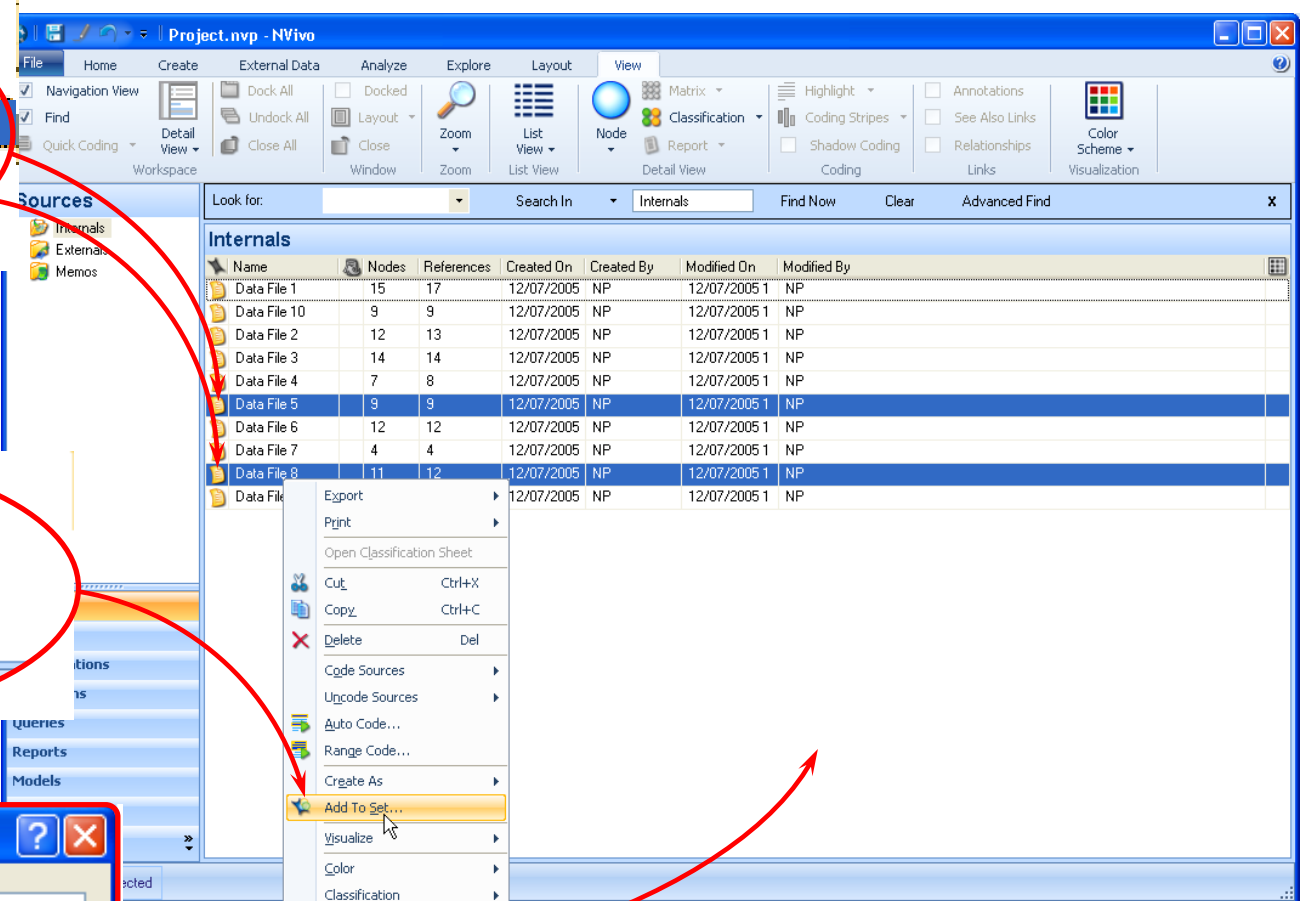
- ✓ Now we can add some more sources to the **Males** set. Hold down the **Ctrl Key** and click the document logo next to **Data File 5** and **Data File 8**.



- ✓ Click **Add To Set** on the menu.



- ✓ Select **Males** in the popup **Select Set Dialog**, and then click **OK**.

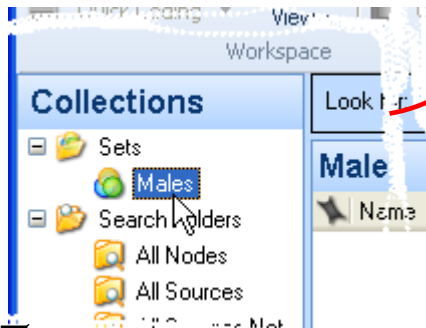


Exercise 9: Viewing Sets

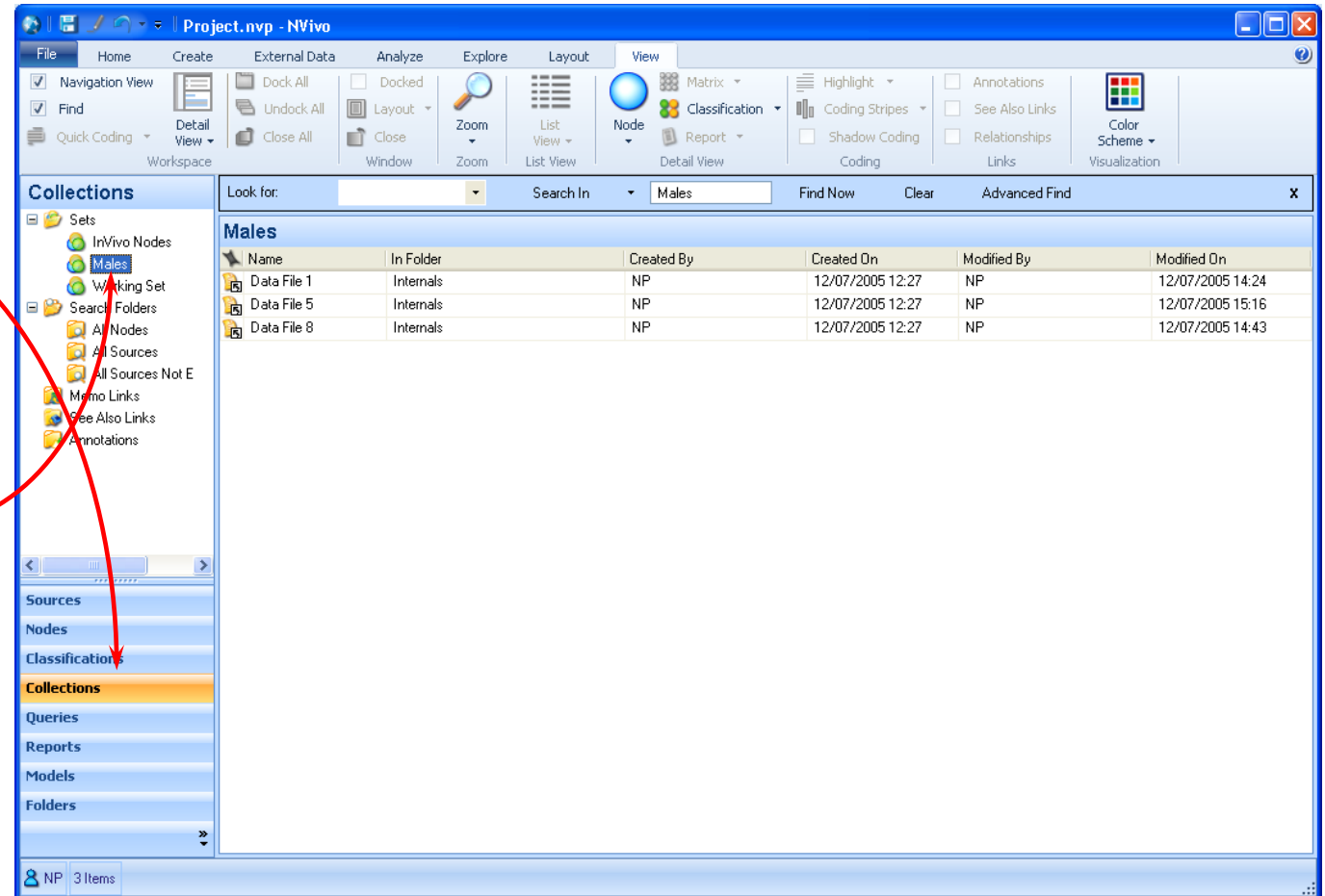
The Data Files contained within this Set of documents can now be explored. For example, this Set of male informants may provide the focus of a search. Using the **Search Tool** (introduced in Exercise 8), the scope of your search can be restricted to male informants by selecting **Males** from the **Document Set** menu, as shown below.



☒ To view your sets select **Collections** from the **Selection Menu**.

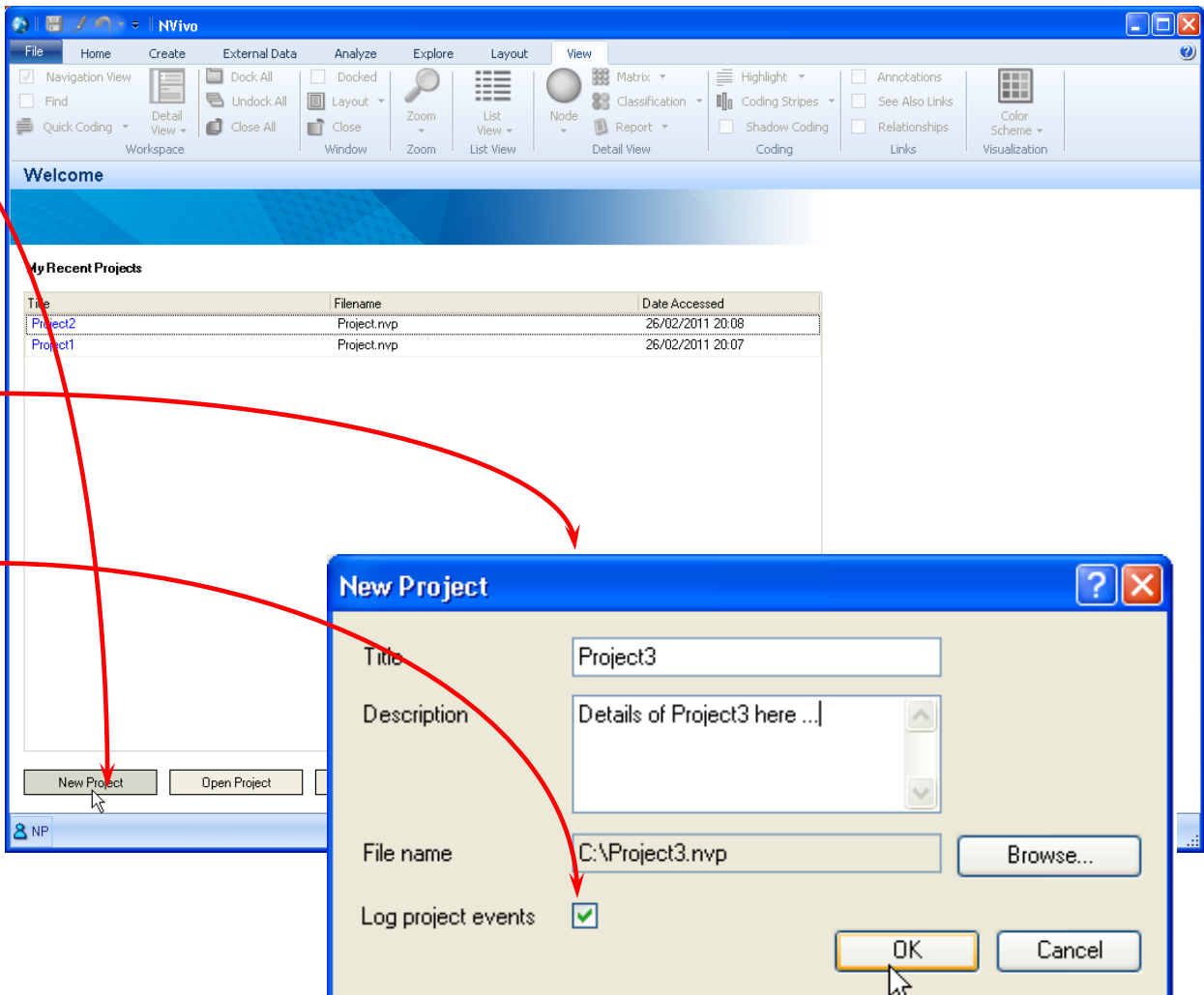


☒ Click on **Males** to see a listing of all of the source documents that are included in the set 'Males'.



Exercise 10: Analysing your own data: Create a New Project

So far, in this user guide, you have worked with previously created Projects. In order for you to be able to analyse your own data in NVivo, you will need to create a new project and import (or create) data files.



The screenshot shows the NVivo 9 'Welcome' screen. The 'New Project' dialog box is open, with the following fields and values:

- Title:** Project3
- Description:** Details of Project3 here ...
- File name:** C:\Project3.nvp
- Log project events:** ☒

Red arrows indicate the sequence of steps: from the 'New Project' button on the Welcome screen to the dialog box, and from the 'Log project events' checkbox to the 'Log project events' field.

My Recent Projects

Title	Filename	Date Accessed
Project2	Project.nvp	26/02/2011 20:08
Project1	Project.nvp	26/02/2011 20:07

New Project

Title: Project3

Description: Details of Project3 here ...

File name: C:\Project3.nvp

Log project events: ☒

OK Cancel

- ✓ Click on **Create a Project** in the **Welcome Screen**. You will see the **New Project** dialog as shown right.
- ✓ The **New Project** pop-up dialog opens as shown right. Enter the name, and a description of your project (if required), in the text boxes.
- ✓ It is useful to maintain a log of your project changes, so check the box “**Log project events**” if you want NVivo9 to maintain a log file.
- ✓ Click on **OK** to finish. NVivo 9 will open as a new project with the Internals List View.

Exercise 10: Analysing your own data: Import a Word Document

Having created your new project, now try to import one of your Word documents.

☒ Click on Sources in the **Selection Menu**.

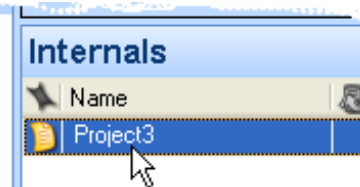
☒ Click on Internals in the **Navigation Pane**.

☒ Right click inside the **Internals List View**, and select **Import Internals** from the menu, and **Import Documents** from the sub-menu.

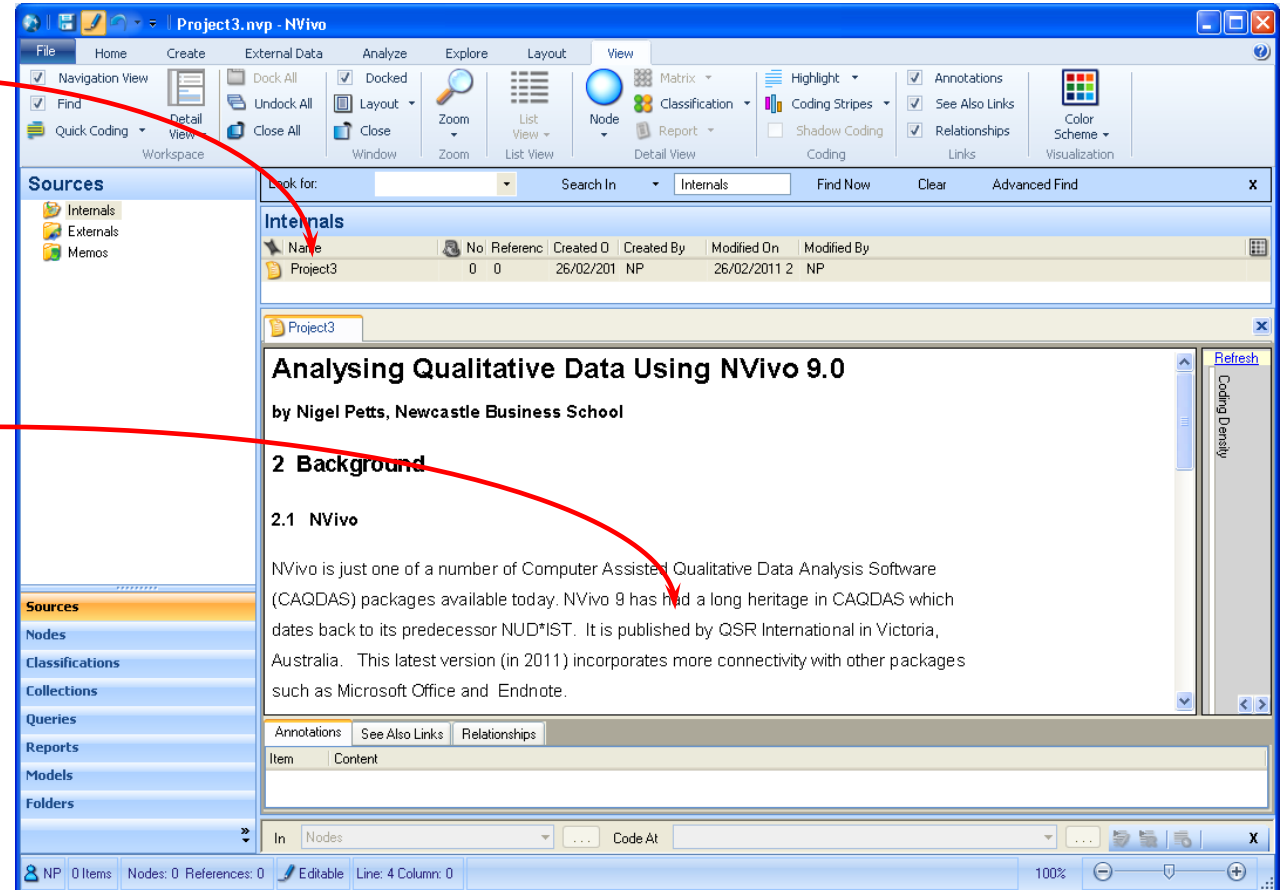
☒ Click Browse and locate your Word Document on your computer. Click **OK** for NVivo9 to load it as an **Internal Source**.

Exercise 10: Analysing your own data: Import a Word Document

The document that you have loaded can now be coded as shown previously in this guide.



- ✓ Double click on **Project3** (or your own document name) in the **Internals List View**. You will now see the Word document opened in the **Detail View**.
- ✓ Try coding a portion of the text (as described before in Exercise 4).



Further Reading and FAQs

NVivo 9 is packaged with a demonstration full project 'Sample Project.nvp'. This is normally stored at this location in a default installation of NVivo 9: <C:\Documents and Settings\All Users\Documents\NVivo 9 Samples>. Browse through this work to see how various types of files are handled by NVivo9. We have only 'scratched the surface' of NVivo 9 with this guide. As you become more familiar with it you will realise that is more than just CAQDAS software. The following points are made to highlight specific features that you may want to use from the outset.

Importing MS Word files into NVivo 9

As seen, this is a straightforward exercise. MS Word files are relatively small so they can normally be imported as Internal Sources. NVivo9 will usually preserve the formatting of MS Word. It should be noted that if your document contains third party embedded code (e.g. Endnote Cite While You Write) these may not be recognised within NVivo 9.

Importing PDF files into NVivo 9

NVivo 9 (SP1) will import PDF files, the results obtained depend upon the quality and sub-type of the .PDF file. NVivo 9 displays the underlying text file rather than the graphic part of the file (that is seen in Adobe PDF Reader). The display within NVivo 9 can be unpredictable when you import some of the poorer quality full-text .PDF files that can be found on the internet. The use of other third party software to clean up low quality PDFs is recommended before importing (e.g. ABBYY PDF Transformer 3.0).

To import other files and media types into NVivo 9

NVivo 9 can import a very wide range of file types that include video, audio, images, and documents. Consult the QSR website for help concerning the compatibility of any particular media type. If you are intending to import video, your computer must have Apple Quicktime installed (this is included in the NVivo 9 installation package). The best video format (in the author's experience) for NVivo 9 is MP4. **Please note:** video files are large and therefore are stored outside of the NVivo 9 software package as External Sources. To see more, load the sample project and go to these locations ...

Images in NVivo9: [Sources > Internals > Area and Township > Competing water uses](#)

Video in NVivo9: [Sources > Internals > Interviews > Betty & Paul](#)

Audio in NVivo9: [Sources > Internals > Interviews > Helen](#)

Transcribing in NVivo 9

NVivo 9 can be used to create transcriptions from video or audio files. The big advantage of doing it within NVivo 9, is that the software can automatically create a transcript table with timestamps for each section of the recording (see the NVivo website for more detailed help). If you use the services of professional transcribers, they may not have NVivo9. In this case, you can either cut & paste into NVivo9, or create an MS Word file in a particular format that will import directly (see QSR support page for information concerning the required format).

Memos, Annotations and Links

NVivo9 comes with a complete set of tools to record your interpretation of the data sets. Memos are the way that you collect the analysis and interpretations in a form that can be exported for publication to MS Word (or similar packages). See the memos in the sample project and consult the QSR literature.

Finally, a cautionary note

If you are going to commit your valuable research to any form of CAQDAS software (such as NVivo 9); you must assume the responsibility for maintaining the data security backups of your files. We recommend that you back up on an hourly basis all the files that are used by NVivo 9 (and the external sources files that are linked to it). You will probably need to use a portable external hard drive (preferably ruggedised), and suitable software (e.g. NTI Shadow) that mirrors any changes in your NVivo files in historic revision archive files (so that you can go back in time in necessary). Your institution may also provide automated backup of files on the server, please make sure that the NVivo 9 files fall within the area of the server that is protected. In particular, make sure that the .nvp files are always safeguarded.



Your data may be covered by an institutional Research Ethics and Confidentiality (RE & C) agreement. NVivo 9 provides a password protection system for the projects within it. Please take the usual precautions of using a sufficiently strong password (characters and numbers) and ***make absolutely sure that it cannot be forgotten!***

If your RE & C agreement requires encryption you must consult an experienced user of NVivo 9. There are important issues regarding the encryption of external source files, and the danger of deleting primary source material by accident.

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