



Making a start

In: The NVIVO Qualitative Project Book

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Making a start

The hardest part of a qualitative project can be to get started. This section and the software are designed to overcome that starting block.

The NVivo software is designed to make creating a project a minor task, and one that does not need to be delayed until you have some “real” data. Indeed, the easiest way to create data documents is to do it in the NVivo project. So we start there. A project in NVivo does not require any firm decisions or prior shaping. Make it, name it, and get on with the job.



Where to start?

Qualitative projects often start without a clear theory, a specific hypothesis or a firm research goal. If you *are* starting with those, you may already know what you are looking for, where to look and what you can expect to find. But whatever the qualitative method, projects more usually begin with a problem, a question or a puzzle and a sense that a lot more needs to be known before the researcher can start constructing theory, let alone make claims for it. By keeping questions open, we allow ourselves to be informed by the data, redirected, surprised. This requires holding on to rich data in context, with the option to return, revisit, rethink and reinterpret data as we get a firmer sense of what is going on.

This means the researcher approaching a project often has no clear starting line, no clearly marked track to follow and imperfect knowledge of the route or the endpoint. In such a situation it is hard to take the first step. And when it is taken, the early data can be daunting, since qualitative approaches create complex data that can't be tidied without risk of losing something you don't yet know is important.

There are many ways of putting off an "official" start. Rethink the topic, rewrite the proposal, redo the preliminary literature review. All of these are proper processes in qualitative research, but they are wasted if they are not treated as *part of the research*. Explorations of the topic, the proposal, the literature, are data. The project is underway once these are happening. From the beginning, then, we need ways of storing and exploring, reworking and revising those early thoughts and rethinks, tentative ideas, insights, despairing memos, or discoveries in unrelated literature. From this oddly assorted treasure trove of early materials, we build a project up, as a bower bird builds a nest.

Installing and calling NVivo

To use the software, you first have to install it on your computer and then "call" or "run" it. The installer built into the NVivo CD takes you through the few decisions necessary.

Whilst you are working in your project, you must have NVivo running. Other applications may be open on the computer at the same time (but check the computer has enough memory to run them adequately).

Installing NVivo



- If NVivo is not installed on your machine, insert in your CD drive the CD from the back of this book. An install wizard will take you through the few steps to install the software.
- If you have your own software but plan to use the Researchers project, you will then need to use the CD installer to install the relevant sample project files in your QSR Projects folder. After installation the CD can be removed.

- When it is installed, QSR NVivo will appear under Programs on the Start menu in Windows. To run it, as with any other application, simply select Programs, and then NVivo, from that menu.
-

Starting a project

This is possibly the simplest task in this book. When you call NVivo, a Launch Pad appears on the screen, offering options to create a new project, open a project or run a tutorial.

Projects can be created in typical or custom format. Custom format is for researchers who need to password protect their project, or to locate it somewhere other than the default QSR Projects folder.

Create a project



- From the Launch Pad, choose to Create a Project.
- The New Project Wizard offers a choice of a Typical or Custom project. Leave Typical selected (unless there are special circumstances which require a custom setup), and press Next.
- Give the project a Name and a Description. These can be changed later. (If you are using the data provided, call it Researchers and describe it as a project about becoming and being a researcher.) Click Next.
- Check the details about your project setup. Note that NVivo has placed your project in the QSR Projects folder, on your C drive. Click Finish.

You have a project!

First steps

Remember the feeling at school when you got a new exercise book, and tentatively made your first marks on it? You didn't want to spoil it, so you began with extra care and many promises to yourself about how well you were going to work in this new book.

A new project in NVivo requires less care. Any document can be edited, and any thinking about data can be revised or deleted. So the best advice is to start as soon as there is something to start with, and drop into the project anything that might be worth keeping. It can be discarded later if you decide it is not precious.

Recording your initial thoughts

Where to begin? You may have reviewed some literature, written a policy document, interviewed someone, or run a focus group. Later, these can be directly imported (see Part 3). But for now, for most projects, some thinking about what you're asking is the best place to begin. Start with a new blank document in NVivo where you can progressively record your thinking about this project.

Using the NVivo editor to create a new document



- From the Project Pad, choose to Make a Project Document. The New Document Wizard will open.
- Click the final option—to Make a new blank document, ready for use in the NVivo editor.
- Name the document, for example, “Project Journal.”
- In the description slot, type a description that is useful, for example, “Record of my developing ideas about [topic].”

A new document is created. NVivo opens the blank document on screen in a Document Browser. The Browser offers a wide range of tools for editing, changing and coding the document.

Editing in the Document Browser

Just start typing as though in a word processor, and a first document is happening. Your record of ideas about the project can grow as you wish, and will provide a valuable history of the project. You can close it at any stage, reopen it when some more ideas occur and keep typing.

The NVivo Document Browser contains a rich text editor with familiar Edit menu items (Cut, Copy, Paste, Find, Replace). Font, colour, styles, and other formatting icons on the toolbar can be used to direct attention or add emphasis.



- Start by writing about the project's goals, for example
 - why you are doing it
 - what you think it's about

what are the questions you're interested in, and where those came from

—

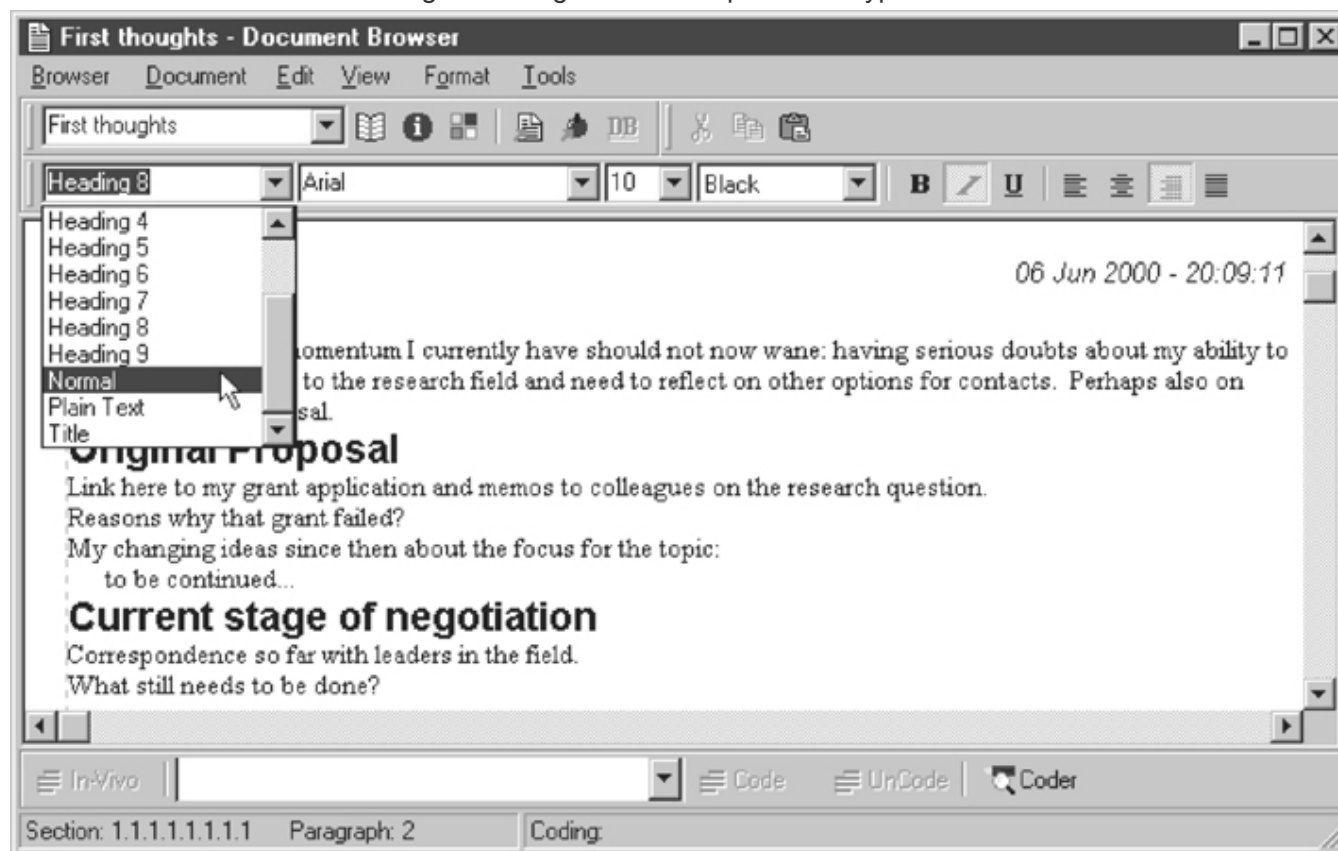
what you expect to find, and the basis for that.

Feel free to edit the text you have written.

- Now go back to the top and type in a heading for this entry. Add the date by selecting Insert Date & Time from the Edit menu.

You can now use all the features of rich text to clarify your document, and to make it more meaningful and useful.

- With your cursor in your heading, select Heading 1 from the Styles slot in the formatting toolbar. The text for the whole heading will change to Arial 14-point bold type.



- To make a subheading, place your cursor where you wish to write (or in the text, if it is already written) and select an appropriate style, such as Heading 2, or Heading 4.
- Add emphasis to your text with bold or italics—perhaps bold for keywords, or change the font size. Use a color to mark things you're still unsure of, with a different one for key concepts or for things you already know, or significant questions.

You will now be able to see a clearer path through your text, while aspects that are particularly important and

which will need to be reviewed will catch your attention on later perusal.



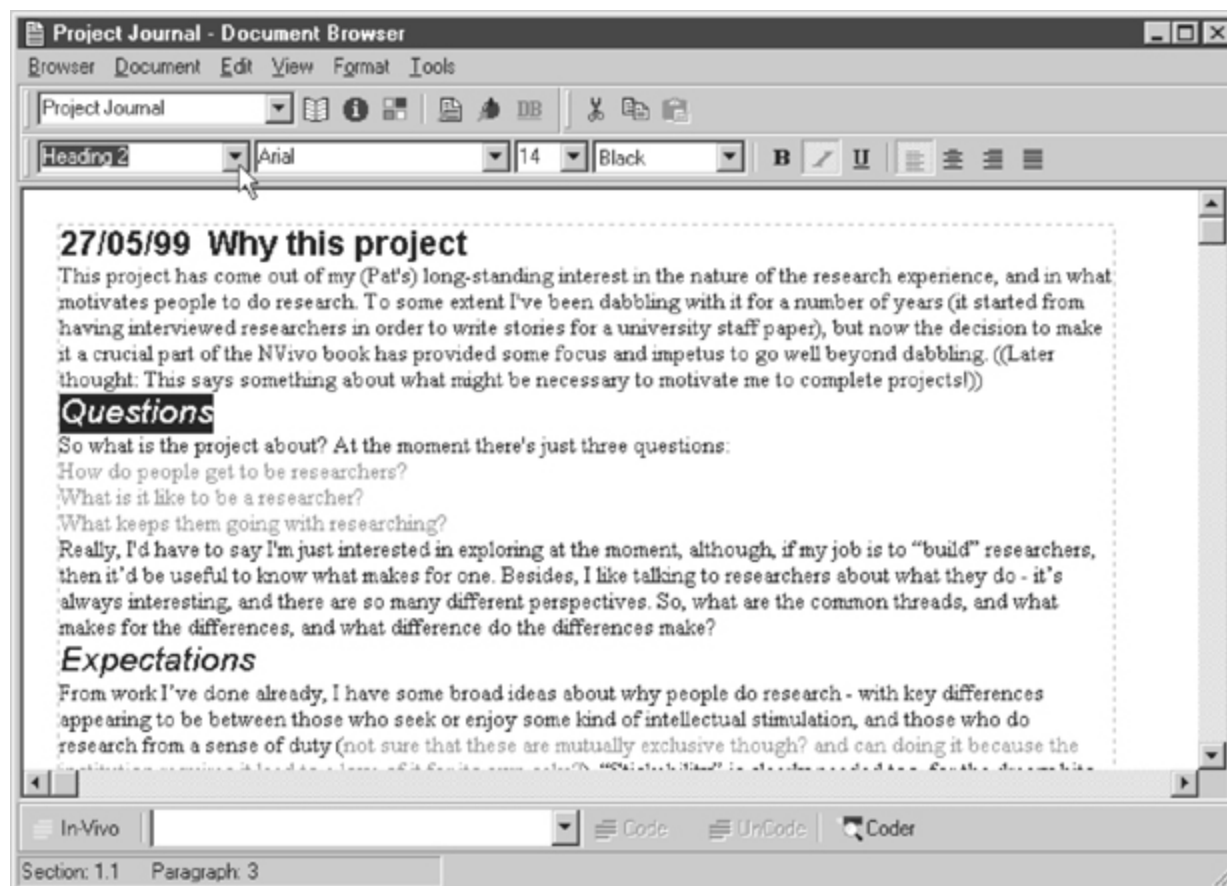
The Document Browser is a special tool for combining editing and coding. Although it is like a standard word processor, it will not allow overtyping of highlighted text. If you highlight a passage of text and start typing, NVivo will assume the highlighted text is to be coded with what is typed. To change the text, press Backspace or Delete to remove the highlighted passage, then retype.



If you have decided to use the Researchers project, use the instructions above to create a project and make a document in the NVivo editor.

Provide a heading, using Heading 1 style, for example, “Initial thoughts.” Insert the date under the heading. You might record ideas about what it means to be doing research, something of your own experience of doing research up until now, why you are researching now and what you want to be able to do with NVivo. Make subheadings for the different things you write about and use the Styles slot to set them at Heading 2.

The start of my project journal is shown in the box below. The first entry suggests the project had rather nebulous beginnings. Even in writing those first comments, I set down ideas, moved away, came back and fiddled, decided to add headings and color, and so was creating a “living” document that changed and was edited as my thoughts developed.



Managing your documents

The Document Explorer in NVivo shows a “bird's eye view” of all project documents and assists with managing documents. Like the Windows Explorer, it shows, in outline, what each document is about, as well as the properties of each document.

Explore a document



- On the Project Pad, click on Explore all Project Documents.
- The Document Explorer will open. In the left pane, the All Documents folder is highlighted. In the right pane of the Explorer your first document is listed, with its size, coding information, creation date and the date it was last modified.
- Double-click on All Documents and highlight the name of the first document.
- On the right pane of the Explorer, the outline of that document will be shown. If a heading has a + sign next to it, click on the + and the subheadings for that section will show. Additional information about the document shows at the base of the Explorer window.

View and change document Properties

The Properties dialogue will allow you to rename your document, to give it a description, or even to change the color of its icon! It also allows you to specify whether a document is a memo.

- Click on the Properties icon, *or*, select Properties from the context menu which is found by clicking your right mouse button.
- Check This document is a memo.

NVivo automatically distinguishes between memo and non-memo documents—something we will find useful at a later stage of the project.

Jump to the Document Browser

To return to the text of the document, or a particular place in the text, ask to Browse it. To browse a document:

- Highlight the document title (anywhere in the Explorer dialogue) and click on the Browse icon in the toolbar  *or*,
- Highlight the document title and select Browse/Edit/Code Document from the context (right mouse button) menu,

The Browser will open where you were last working.

To open your document at a specific section:

- Highlight your document title in the left pane of the Explorer, so that its contents are outlined in the right pane.
- Click in the section you want to view, and choose Browse/Edit/Code from the context menu.



A reminder: press F1 to read more about the dialog you are in, or go to the contents of Help to read about any aspect of the software.

Linking to other data

A Journal will often benefit from being linked to other material, to illustrate or develop the points made. NVivo allows hyperlinks from the text to other related files—files which you don't want to import aren't needed or can't be imported into the project. By making these links you create other “bites” of data within a document—so these are termed DataBites. When a DataBite is created, the text is marked as the “anchor” for the link. A click on the anchor will allow you to choose to jump directly to the linked file.

For example, if you are working on a funded or dissertation project you might link your Project Journal to the

formal project proposal. Whilst it is unnecessary to have the whole proposal in the project (and it may have formatting that will not be preserved in NVivo) a link to it will allow access at any stage. Or you might wish to link your Journal to a photo of the first team meeting, a picture of the site for the project, or a clip from the tape of an early discussion about the project, none of which can be saved as rich text for import to NVivo.

Creating a DataBite, linking the text to your proposal



- Find a reference within your Project Journal to the research proposal, and highlight the text where the reference is made. (Highlight at least one character or space, but preferably more so it can easily be seen. It may be useful to edit into the text words that explain what you're linking to, and to highlight those words.)
- Click on the DataBite symbol. The dialogue will ask whether you want to make an internal annotation (an option discussed in Part 4) or link to an external file. Choose to link to an external file.
- You are taken first to a folder provided by the program for storing External DataBites. Navigate through the directories to locate the file you wish to link. Select it, and click Open.

The text that you had highlighted will now appear in green with an underline. This marks it as the “anchor” for a DataBite.

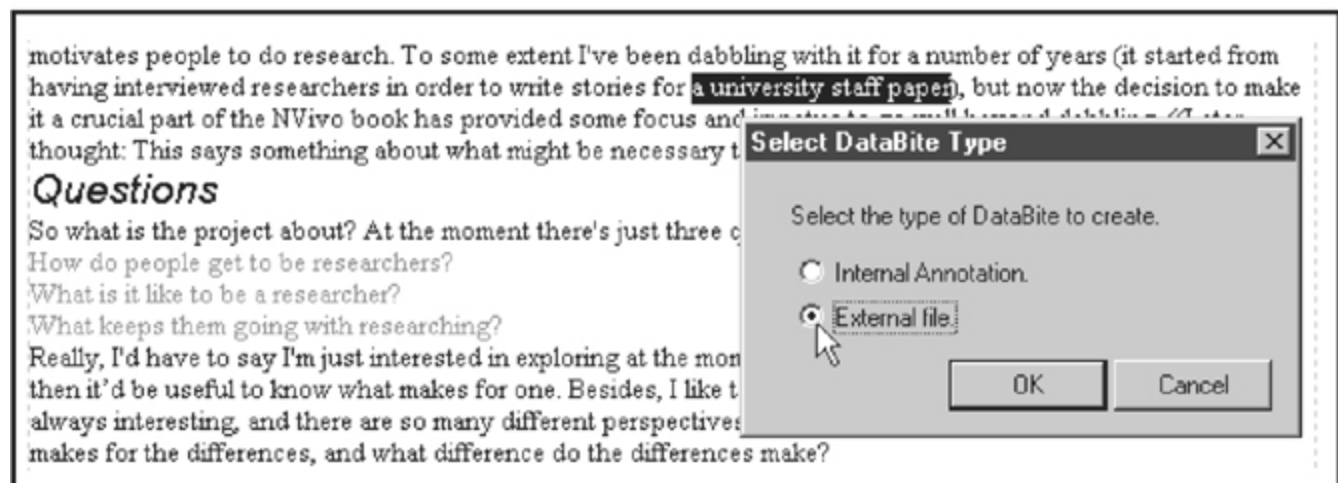
Accessing the DataBite

- Click on the DataBite anchor (the underlined green text).
- Click on the DataBite icon in the Browser's toolbar, *or*, select Inspect DataBite from the right mouse button's context menu.

NVivo calls the appropriate application, which opens the linked file. The project proposal will be opened in your word processor, or the photo in whatever software your computer has for displaying photos. You can edit those files and save any changes made in the normal way.

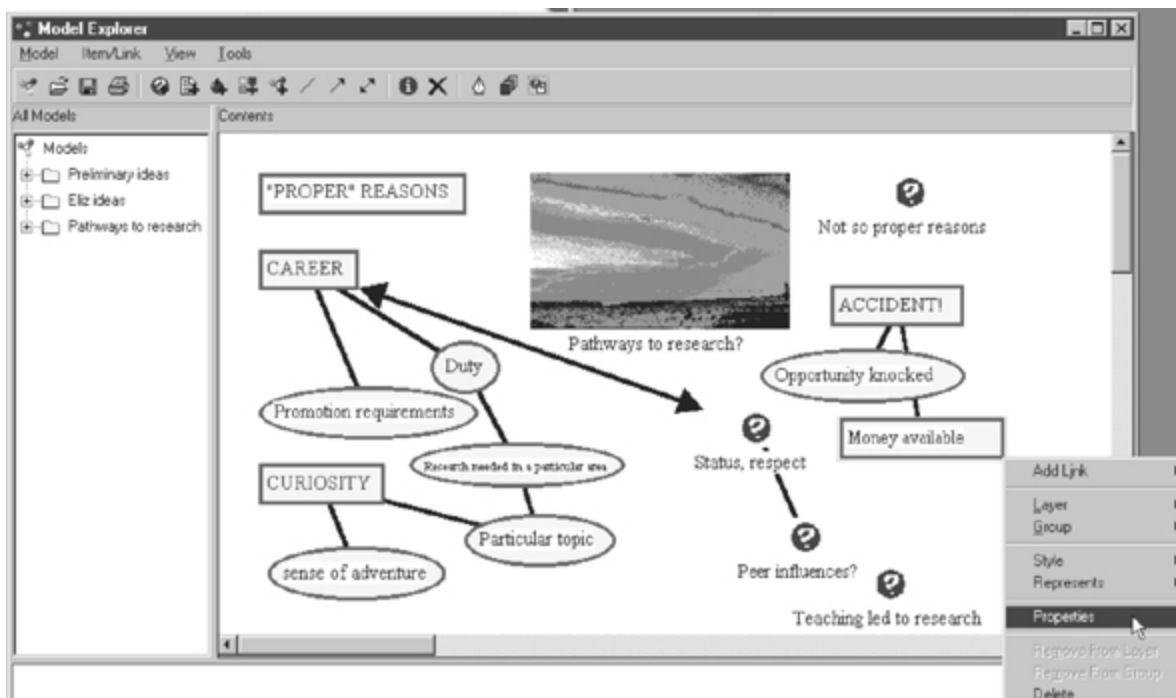
Note: If you move the external file after making the DataBite, the link to your NVivo document will be broken and NVivo will ask you to re-locate it.

Follow the instructions in the previous section for making a DataBite to link your Journal text to a photo. You can link to an authentic (!) archival record of the authors creating trees in the early stages of Pat's Research Farm. Add a comment about this being a project set up by Pat, highlight it, click DataBite, choose to link an external file, and locate the photo file. It is in Researchers 1\All Users\External DataBites. To see the photo, click in the DataBite anchor then on the DataBite icon on the toolbar.



Modeling your preliminary ideas

Often it's helpful at an early stage to sketch ideas about a project. NVivo provides a Modeler to assist in this. You might make a diagram of the relationships or patterns you expect to find in your study, based on prior experience or preliminary reading. Identify things in your journal and use links between them to indicate possible relationships.



Create a model



- From the Project Pad, select Create and Explore Models. The Model Explorer will open. Expand the window.
- Select New Model (on the left side of the Explorer), click on it again to change to edit mode, and type in a name for the model.

...add items to the model

- Click on the Document icon in the toolbar. Select the Project Journal and click OK.
- A document icon with the document's name will appear in the model. (This is a “live” link to the document: double click on it to see its Properties; or select it and from the context menu choose Browse/Edit/Code Document to see its text.)
- Click on the New Item icon in the toolbar, *or*, select Add New Item from the context menu. A “?” icon will appear in the model. To name this icon to represent some thing, person, place, action, event or other concept, double-click on its label, and type in the name.
- To design the icon, select it and click on the Properties icon in the toolbar, *or*, select Properties from the context menu. Click the Appearance tab to change its color, shape or font.

...then link the items

NVivo offers three types of model links—a simple line, a single-headed arrow, and a double-headed arrow.

To link items:

- Click on the item you want your link to *start from*.
- Click on the type of link you want in the toolbar, or, from the context menu select Add Link and the type of link you want.
- Click on the item you want the link to *go to*.

...and label the links

- Select the link (it becomes highlighted) and choose to see its Properties (using the toolbar icon or the context menu).
- Type a label for the link into the Properties dialogue. The style or colour of the link can also be changed through this dialogue,.

Move the elements of your model around the screen until you are happy with the layout and appearance of your model. You can also print the model (choose Print from the Model menu), or you can Export Model to Clipboard and insert it into another application.



Making it safe

For those with full software, there are two different ways of saving a project. The first updates the version of the project you are working on. The second saves a backup copy of the project. It is advisable to do both.

Whenever you feel confident of the work done, you can tell NVivo to save by selecting Project > Save Project from the Project Pad menus. Revert to Saved will return the project to where it was when you last (deliberately) saved the project. NVivo has been auto-saving whilst you worked, and this updates a single copy. You can set how frequently the auto-save occurs (select Tools > Options from the menus at the top of the Project Pad).

For safety you need at least one other copy, regularly updated, as a “back-up” against machine failure (or even researcher error!). Making regular backups for a project is essential. No matter how expensive the equipment, power failures or human intervention can make it crash, and no matter how confident you are, errors occur.

Saving the project



NVivo allows you to make a backup copy while you are working in your project, and provides a choice of which copy to continue working on. When you are working in your real project, also make regular backup copies that are stored on *another computer or safe storage medium* (zip disk or file server).

- From the Project menu, choose Save Project As... A dialogue will open suggesting an appropriate title and location for your backup project. The title can be changed, but be sure you make it different from any existing titles (and change the backup Project Folder name to match, as well). You can change the location for your backup also, for example, to another drive or other storage medium.
- Indicate whether you wish to continue working on the current copy, or the new one, by checking (or not checking) the option Close the current project and open the new one.

Note: This process calls for good housekeeping: always keep a record of your backups and their names. When you next open your project, you will want to be sure about which copy you want to continue working in.

Taking stock

The project has started, a first document has been created, and you're under way storing and picturing early ideas for the project. There is of course no requirement that a project start this way, but it's a good way of getting going. All of the methods of qualitative analysis share an expectation that analysis should be ongoing from the start of the project, whether the project is designed to test prior ideas, or to generate new theory. The early hunches and questions are data, informing insights later, critiqued in the light of subsequent discoveries. Understanding and theory evolve, growing out of the data beginning from when the project is first conceived.

Starting this way, you have prioritized your ideas and questions. Data processing tasks won't overtake analytic insights. As this record grows, the journal will chart the history of your understanding of the issues and development of hunches and ideas. You can link it to external documents such as literature summaries or original proposals or to data documents as they are added to the project. You can model those early ideas, display them for discussion and store them for review. The resulting log of your progress will become the foundation of theory tested by or generated from the data, whatever your chosen qualitative method.

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