

DR CAROLINE JAWAD

NVIVO12 WORKSHOP

INTRODUCTION TO THE FUNDAMENTALS OF NVIVO 12



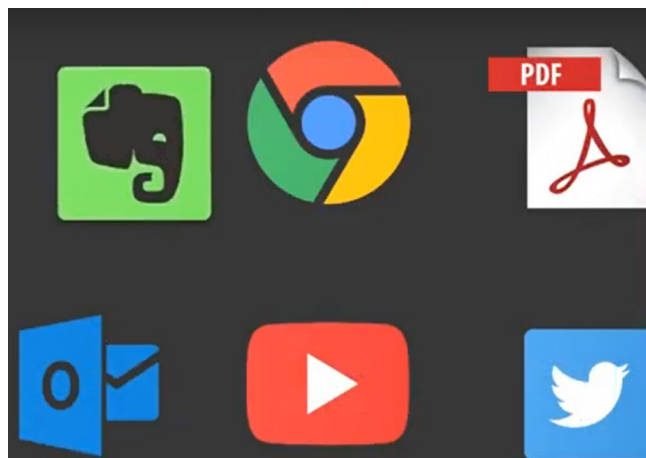
OUTLINE FOR NVIVO12 WORKSHOP

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Keyboard shortcuts: common NVivo tasks

To do this	Press
Undo previous action.	CTRL+Z
Select all—for example, all items in a list, all text in a file, or an entire image.	CTRL+A
Copy selected text or project item.	CTRL+C
Paste text or project item.	CTRL+V
Cut selected text or project item.	CTRL+X
Delete selected text or project item.	DELETE
Open a project.	CTRL+O
Print project item.	CTRL+P
Export project item.	CTRL+SHIFT+E
Save the project.	CTRL+S
Create a new project.	CTRL+N
Switch between edit mode and read-only mode (for files and maps open in Detail View).	CTRL+E
Move from selected 'codable' content in Detail View to the Quick Coding bar	CTRL+Q
Get Help.	F1
Import a new file (document, PDF, audio, video or picture).	CTRL+SHIFT+I
Cancel a process such as a query or report.	ESC

NVIVO 12 INTRODUCTION

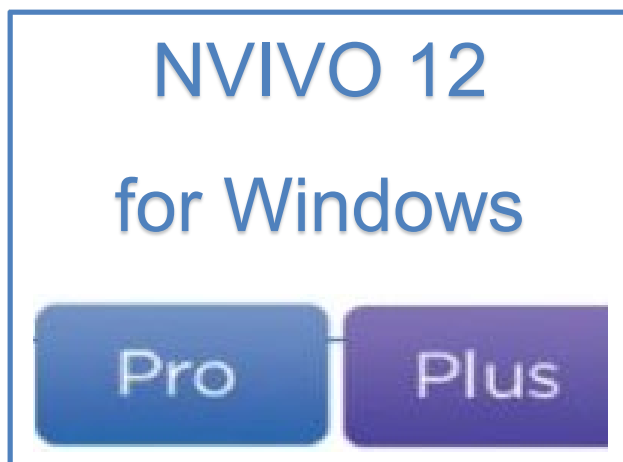
Sample project: Environmental Change Down East

The sample project that accompanies NVivo for Windows, *Environmental Change Down East*, is an actual study conducted by the Nicholas School of Environment at Duke University. The study investigated coastal communities in what had been a remote area of North Carolina. The researchers' focus was on community members' perceptions of development and land use change in a period of substantial growth. The purpose of this study was to gather data through a variety of methods (e.g. interviews, surveys), to bring together stakeholders on all sides and to facilitate public dialogue about the area's future. The ultimate goal of the study is to help communities, developers and planners envision long-term strategies for sustainable land use and development.

As we explore this sample project, you will be introduced to the terminology used in NVivo, the different elements of an NVivo project and the types of data that can be used in NVivo for Windows.

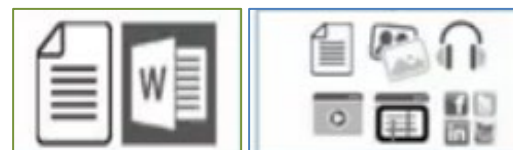
PART 1: LAUNCH AND INTERFACE

- User Profile
- Ribbon Interface
- Status bar and list view
- Checking for updates or service packs
- Opening and creating projects
- Project structure
- Save, backup
- Convert project



Professional: Designed to work mainly with Text Based Data, sources of data (audio, video, social media)

Plus: Social network analysis tools, patterns, themes, sentiment.



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NVIVO INTERFACE

FileHomeImportCreateExploreShare

PasteCutCopyMergeClipboard

PropertiesOpenMemo LinkItem

QueryVisualizeExplore

CodeAuto CodeRange CodeCoding

Case ClassificationFile ClassificationClassification

Detail ViewSort ByUndockNavigation ViewList ViewFindWorkspace

Quick Access

- Files
- Memos
- Nodes

Data

- Files
 - Area and Township
 - Interviews
 - Literature
 - News Articles
- Social Media
 - Linked Online Reso
 - Survey
- File Classifications
- Externals

Codes

- Nodes
- Relationships
- Relationship Types

Cases

- Cases
- Case Classifications

Notes

- Memos
- Framework Matrices
- Annotations
- See Also Links

Search

Maps

Output

Files

Search Project

Name	Codes	References	Modified On	Modified By	Classification
Overview of Sample Project		0	0 8/09/2015 8:46 AM	WWS	

AB

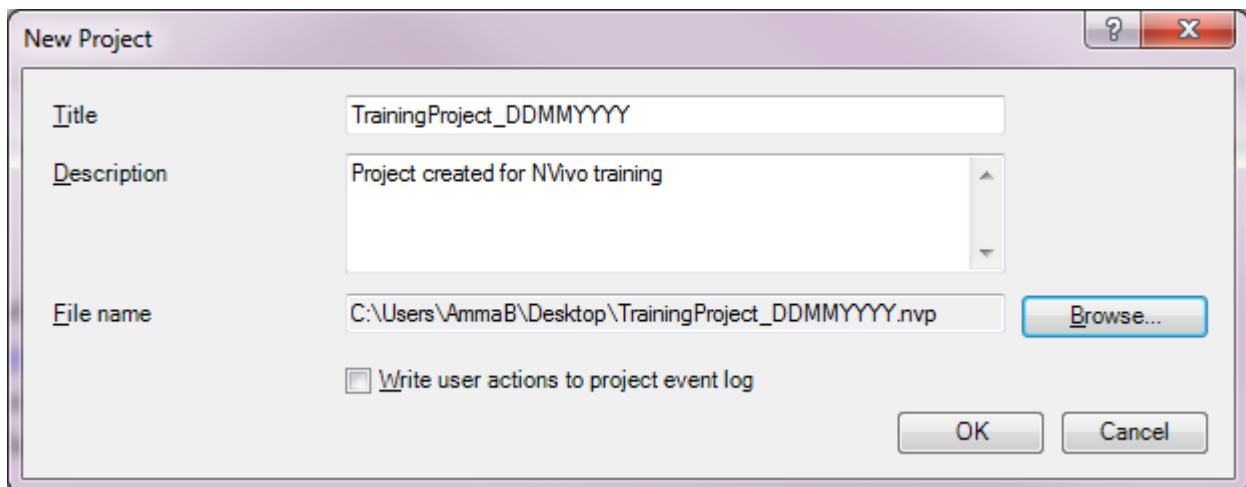
1 Item

PART 2: CREATING A PROJECT

- Create a new project

Create a New Project

- On the File tab, click and it takes you to Info page. Select New.
- Enter the name of the project *TrainingProject_ddmmyyyy* in the title box
- Default location is *My Documents*. For this example: Save to *Desktop*
- Click OK and the project opens

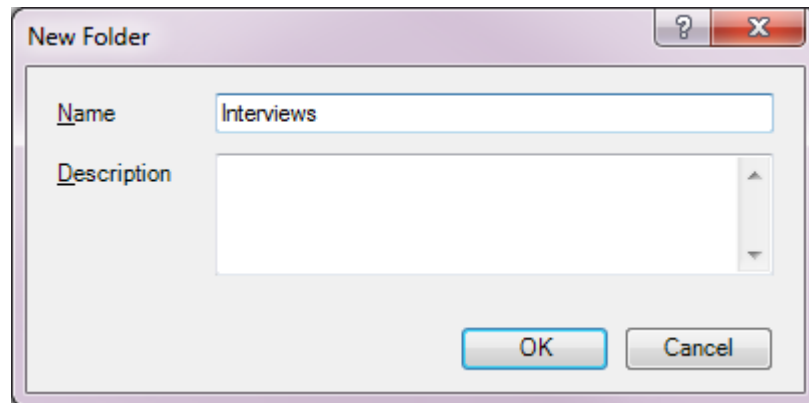


PART 3: DATA

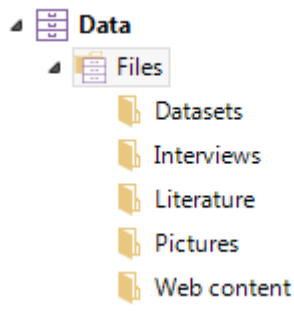
- Create folders to organise your data
- Import, edit and create documents
- Import and work with pdf files
- Import and transcribe audio and video files
- Import image files and add related text

Create folders to organise your data

- In Navigation View, click **Data**, and then the **Files** folder
- Right click on **Files** and create **New Folder** (Alternatively go to **Create** tab on Ribbon, in the **Folder** group, click Folder)
- The **New Folder** dialog box opens



- In the **Name** box, type in *Interviews*
- Click OK
- Repeat these steps to add subfolders named *Datasets*, *Web Content*, *Pictures* and *Literature*



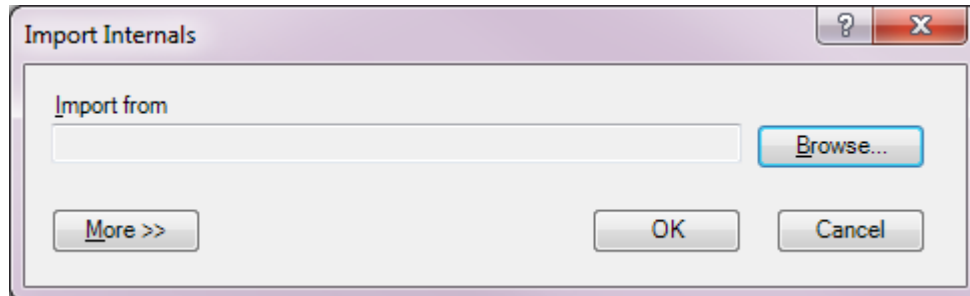
Note: Additional folders can be created at any time

Working with Documents

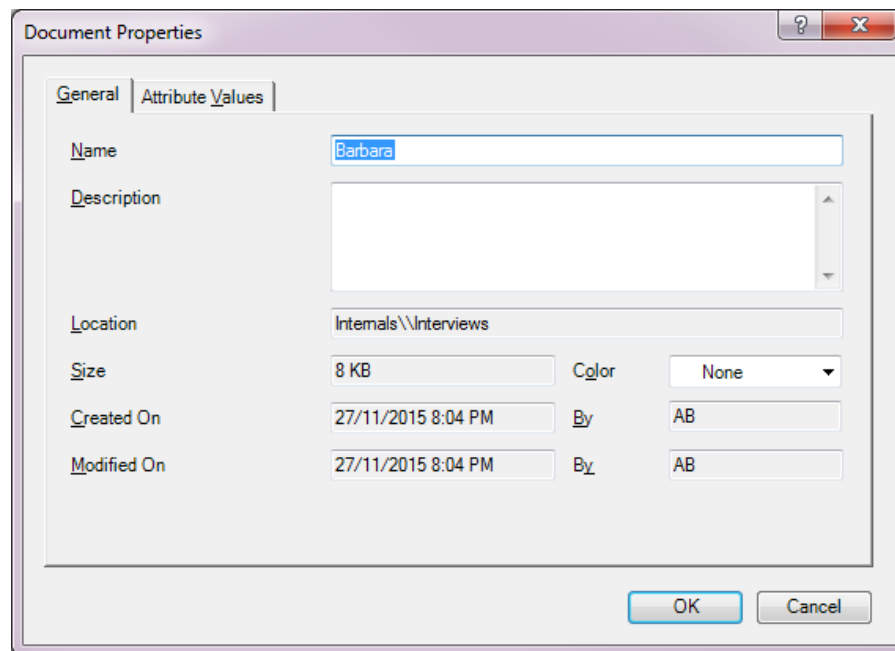
- In Navigation View, click **Files** and then **Interviews** subfolder

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- On the **Import tab** on the Ribbon, under Data, click **Files**, the **Import Files** dialog box opens (Alternatively can r-click in the white space in List View and click **Import**, and **Import Items**)



- Import** documents into Interviews folder: *Barbara, Charles, Dorothy, Margaret, Robert, Susan, Thomas, William*
- Import** *Barbara* as a single import document first



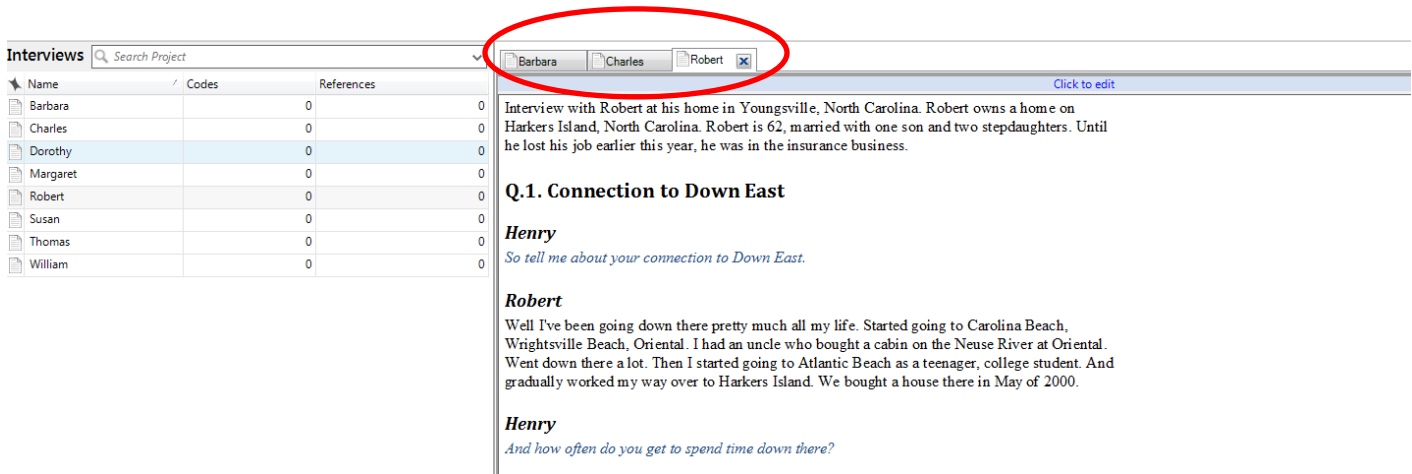
- Repeat this process for the remainder of the required files
- Select the remainder of documents in the *Interviews* Folder and import. (Hold down the SHIFT key to select consecutive files or the CTRL key for a selection in the range of files)

Open a document

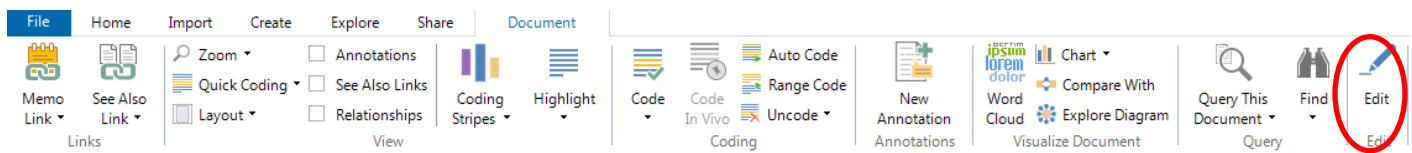
- In Navigation View, click **Files**. Locate the appropriate folder and then select the document in the List View and double-click.
- The document displays in Detail View.

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- You can open several documents at once and move from one to another by clicking the tabs on the top of Detail View.



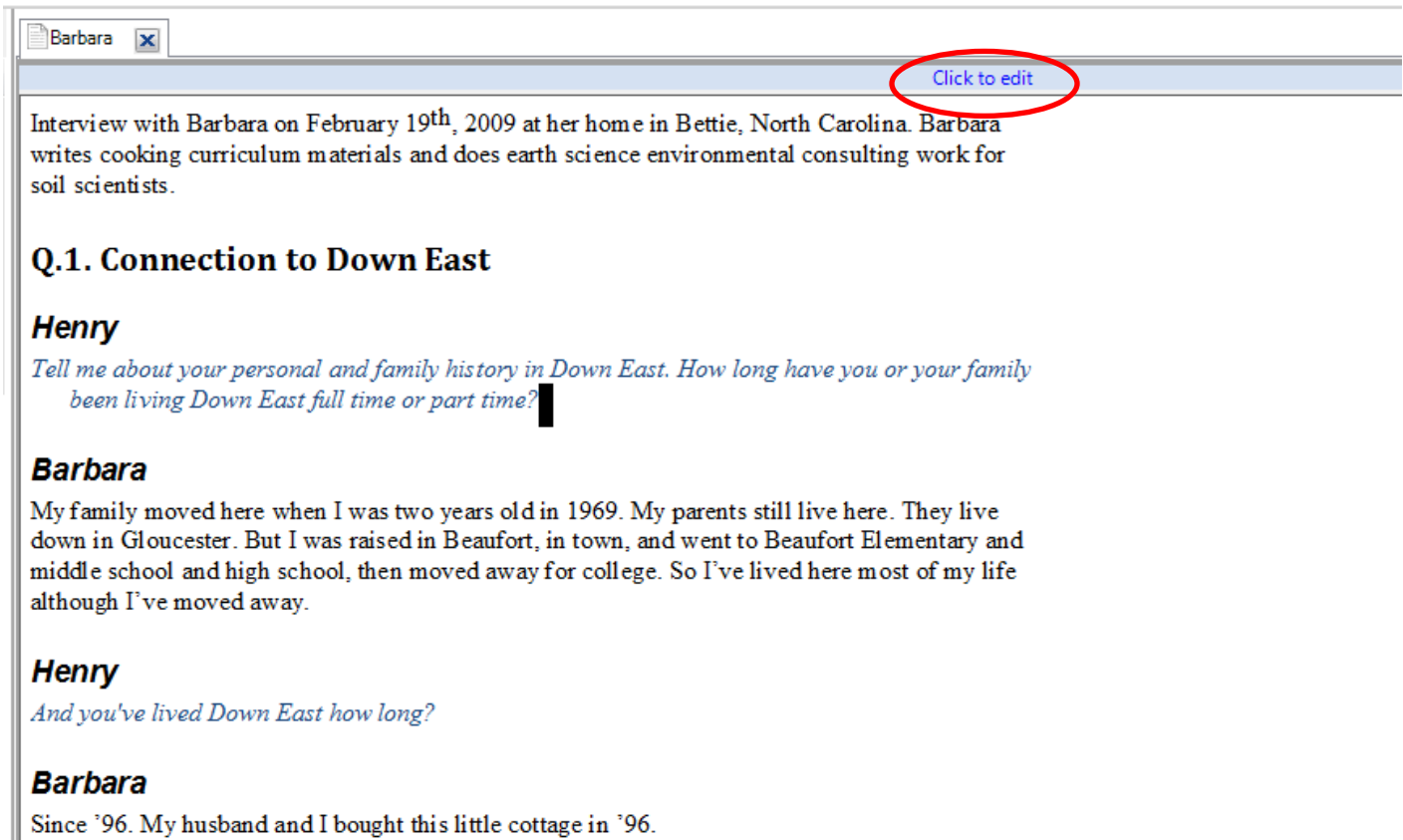
- Once you have opened a document then an additional tab will appear on the Ribbon called **Document Tools**. (Make sure that you click into the document to activate) This contains all of the immediate functions that relate to a document, including Linking, Viewing, Coding, Annotations, Visualizing and Query tools. The editing tools are also accessible from the **Document Tools**.



Edit a document

By default all documents are 'Read Only' in NVivo. If you want to alter the content of a document, you need to enter Edit mode, found on the **Document Tools Tab** or **Click to Edit** (circled in red) while the document is opened in Detail View.

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Barbara

[Click to edit](#)

Interview with Barbara on February 19th, 2009 at her home in Bettie, North Carolina. Barbara writes cooking curriculum materials and does earth science environmental consulting work for soil scientists.

Q.1. Connection to Down East

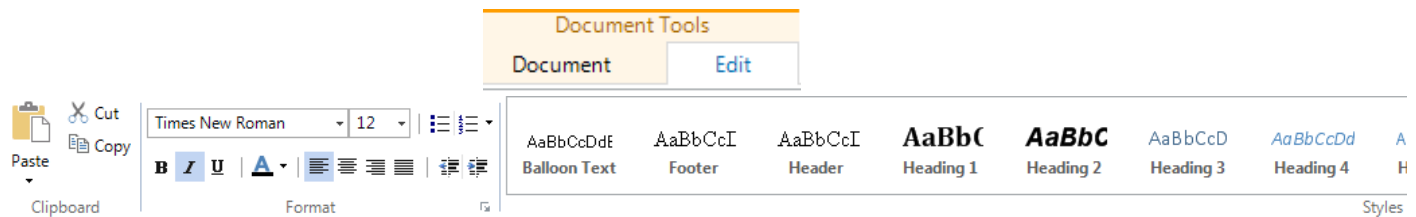
Henry
Tell me about your personal and family history in Down East. How long have you or your family been living Down East full time or part time?

Barbara
My family moved here when I was two years old in 1969. My parents still live here. They live down in Gloucester. But I was raised in Beaufort, in town, and went to Beaufort Elementary and middle school and high school, then moved away for college. So I've lived here most of my life although I've moved away.

Henry
And you've lived Down East how long?

Barbara
Since '96. My husband and I bought this little cottage in '96.

- In edit mode you will be able to add, delete and modify text as well as applying formatting and styles and check spelling within the document.



Document Tools

Document Edit

Paste Cut Copy

Clipboard

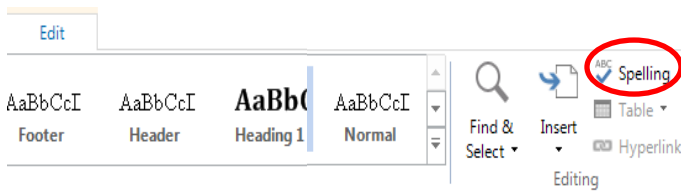
Times New Roman 12

Format

AaBbCcDdE Balloon Text AaBbCcI Footer AaBbCcI Header AaBbC Heading 1 AaBbC Heading 2 AaBbCcD Heading 3 AaBbCcDd Heading 4 A H Styles

Spell check

Spell check is also on the Edit Tab (within Document Tools), locate and click **Spelling** (circled in red)



Edit

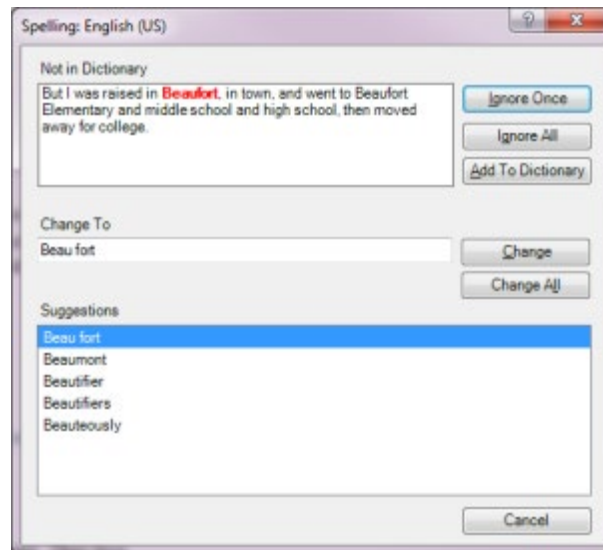
AaBbCcI Footer AaBbCcI Header AaBbC Heading 1 AaBbCcI Normal

Find & Select Insert Table Hyperlink Editing

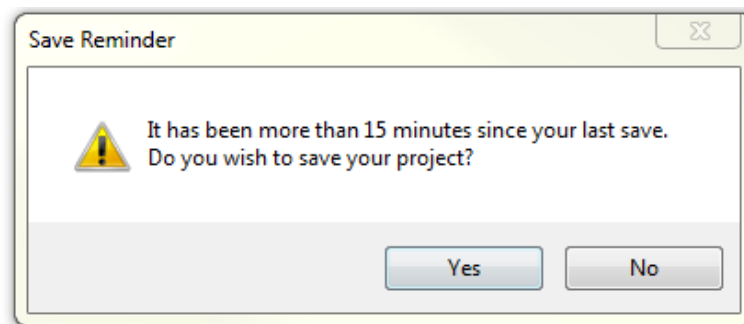
Spelling

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The **Spelling** dialog box appears with the first unrecognized word highlighted. The options available are either **Change** to accept a change, **Ignore All** or **Change All**.



- To close a document: click the **x** on the tab, the software will not ask if you want to save as the saving function applies to the whole project. A prompt box appears every 15 minutes.



Working with Pictures

Import a picture

- In Navigation View under **Data**, then **Files**, select the **Pictures** subfolder
- On the **Import Tab**, under Data, click **Files** and navigate to where Pictures are stored, the **Import Files** dialog box opens or r-click in the white space in List View and click **Import Items** and select pictures. These are in *Sample Project Data/Other Data* and **import picture**, *Barrier Islands and Cape Lookout*

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- The pictures will appear in List View and click to open. Select **Click to Edit** and a row will be added to the right of the image. To include comment on the entire picture type in **Content** column, e.g. *This is an important turtle nesting area and fishing spot.*
- For a selection of the picture: e.g. Lighthouse, drag around the image to make a selection. The selection will be outlined by a dotted line.
- Select a row (click row number) and right click **Assign Region to Rows** and type in *The Cape Look Lighthouse was mechanized in 1967.*

Barrier islands and Cape Lookou



	Region	Content
1	380,280 - 550,430	<i>The Cape Look Lighthouse was mechanized in 1967.</i>
*		

- Once you have opened a picture then an additional tab will appear on the Ribbon called **Picture Tools**. This contains all of the immediate functions that relate to a document, including Linking, Viewing, Coding, Annotations, Visualizing and Query tools. Editing tools are also accessible from the **Picture Tools** under **Edit**.

Working with Video and Audio files

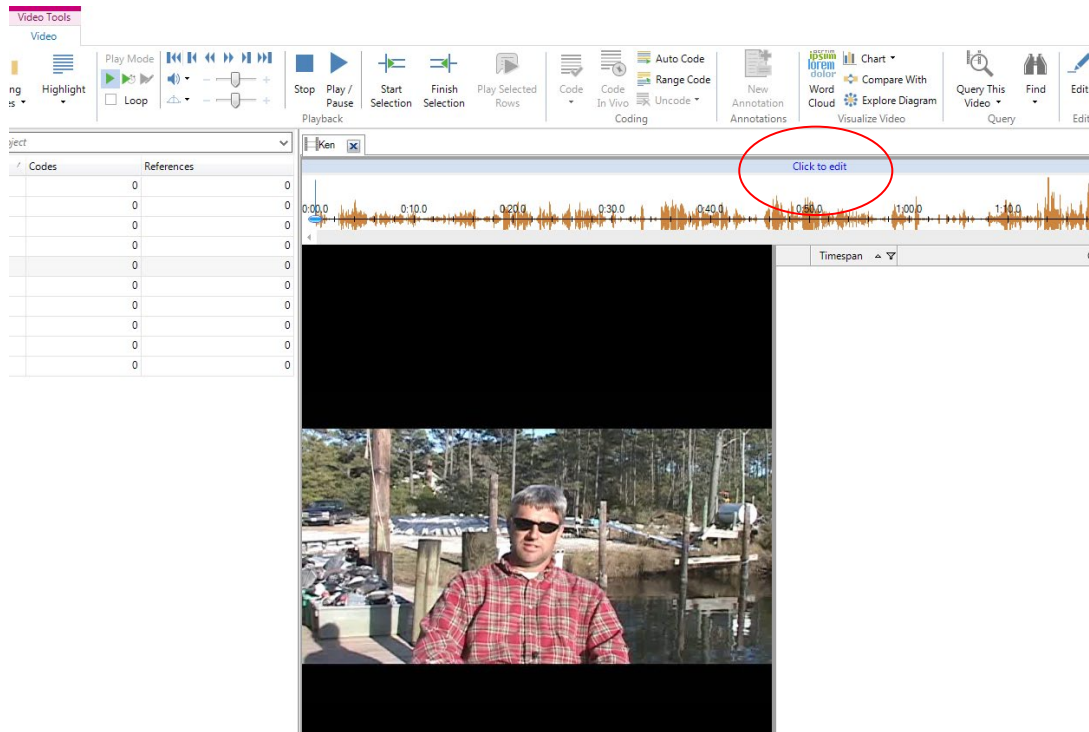
- Import into the *Interviews* Folder: Video: *Ken.wmv*

Transcribe a video/audio file

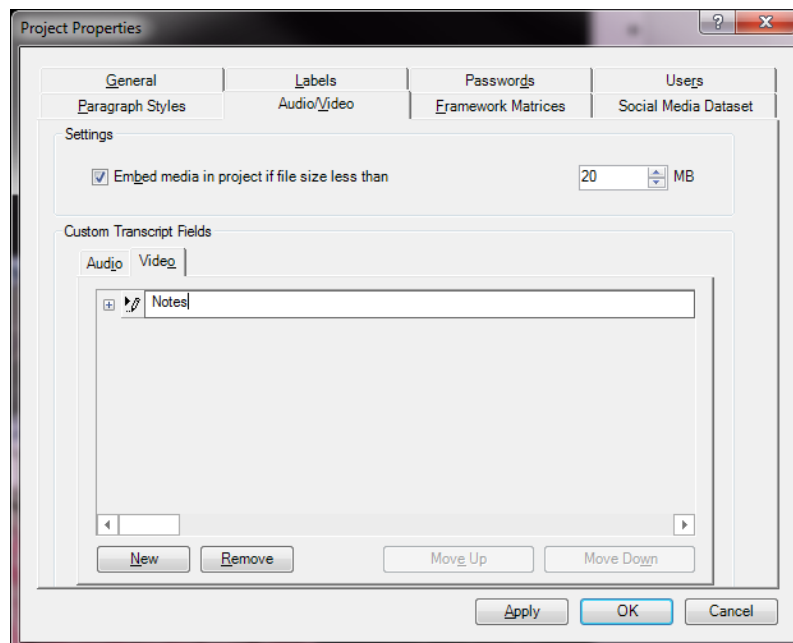
- Open **Video Ken**

Opening up video or audio file prompts a new tab or **Video/Audio Tools** to appear on the Ribbon

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- This includes media functions such as volume, speed, play, stop/pause.
- To activate the **Contents** (columns/rows) **Click to Edit**.
- **Timespan** and **Content** are default columns
- To add an additional column, (maximum 9) go to dropdown menu **File**, go to **Info** and select **Project Properties** and select the tab Audio/Video. A box will appear. **Select New** and name it *Notes* or if you are interesting in noting themes, then *Emerging Themes*. Click OK.

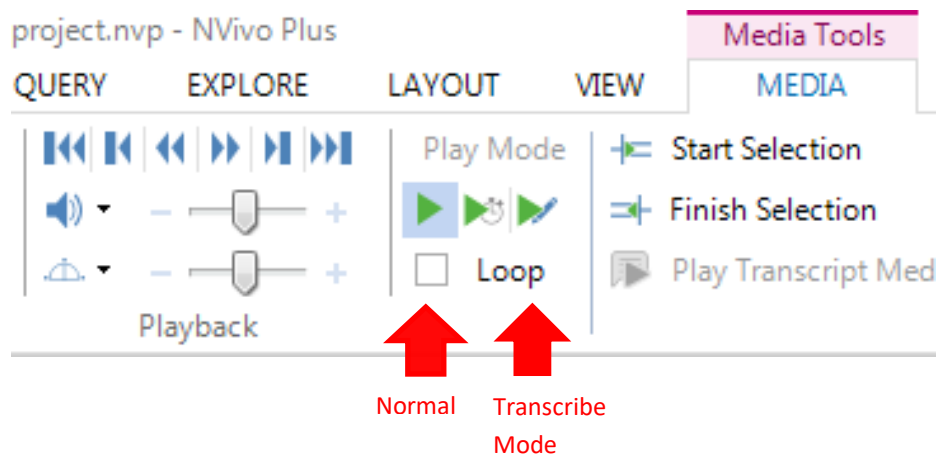


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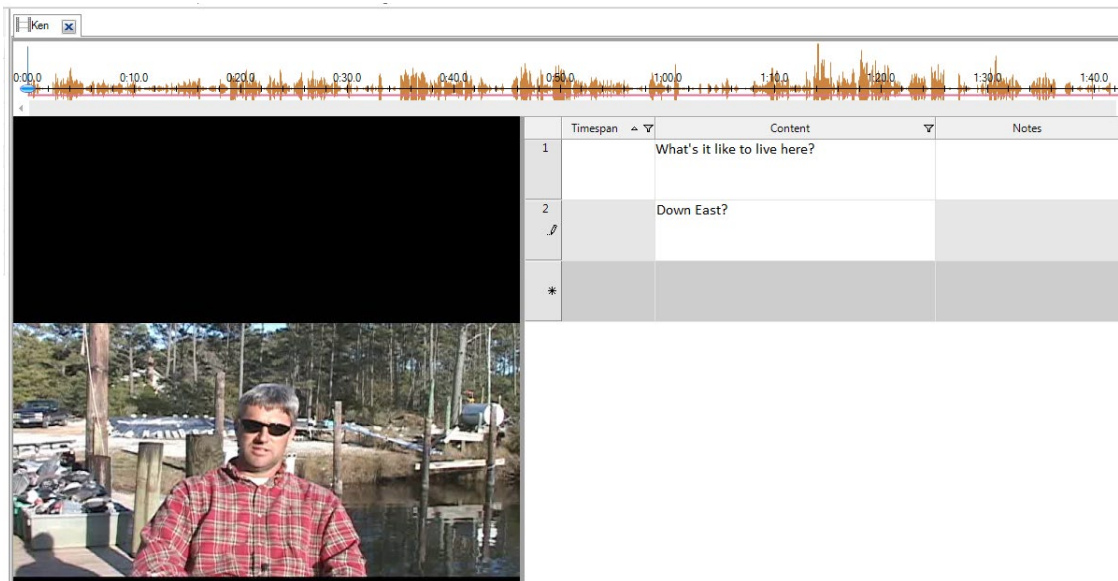
- Return to **Video Ken** and the column *Notes* will appear as an additional column.

Note: This is where you can also increase the default size of a video or audio file (maximum 40 mb)

- To use the transcriber select the **Play Mode** (3 options, we will utilize two (Normal and Transcribe)). Select **Normal**



- Click into Contents and press Play, listen for 5 -7 seconds, then Pause and transcribe into Contents Section
- Continue this process



- When there is a change of speaker, add a row, right click Add Row

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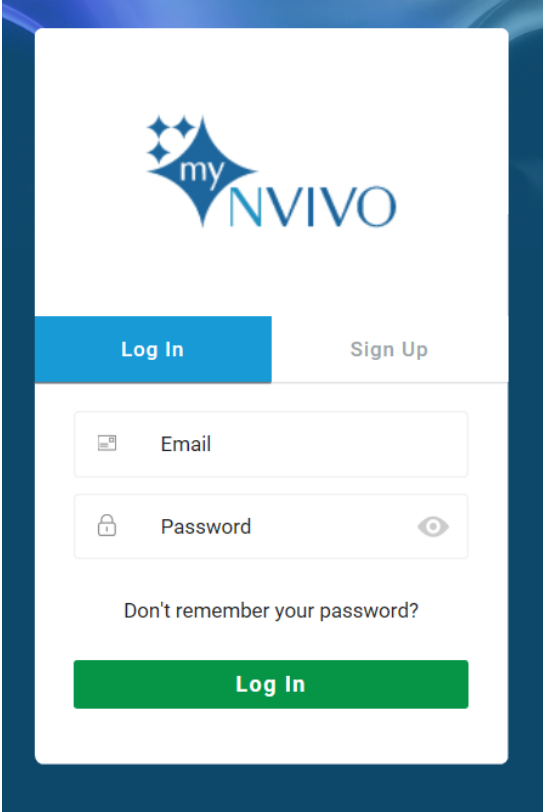
- **Transcribe Mode** activates the **Time Span. Select Transcribe Mode (use Play and Pause)**. To add a new row click **Stop and then Play**.
- Sections of the time line can be used in the same way by dragging across timeline and **Insert Row**.

NVivo Transcription

Another alternative to manual transcription, new to NVivo is QSR International's transcription service. Audio files can be uploaded into NVivo Transcription and with good quality audio you can anticipate 80-90% accuracy with the files transcribed in a timespan of half the length of the audio. You can then make amendments, notes and tag speakers.

A trial quota is available at <https://www.qsrinternational.com/nvivo/trial> with 15 free minutes.

- Using the above link or search MyNVivo, Sign up, and create a new account. You will receive an email including an activation link. Or if signed up, then log in using Email and Password



- Once you have logged in to MyNVivo, the display will show you transcription minutes remaining and enable you to Upload a file. Select **Upload**.

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NVIVO
TRANSCRIPTION

186:51 Transcription minutes remaining Buy Credits

All files Upload

My Uploads

Here is where you upload your files to be transcribed.
Drag and drop or browse on your device.

or
Browse files

To get the best translation results, it is important the sound quality of your media file is high. For more information, please click [here](#).

Sonja(1).wav
Ready

English - International 00:24 **TRANSCRIBE**

- Following import, **select language** to transcribe to, *English – International*. Then select **Transcribe**.

Below is an example of a transcribed short telephone message to illustrate. Cost of buying credits is \$40 for 60 minutes. Approximately 67c per minute. The more credits you buy, the cheaper the price per minute.

NVIVO
TRANSCRIPTION

184:51 Transcription minutes remaining Buy Credits

Alt EXPORT SAVE SonjaMessage.wav Saving...

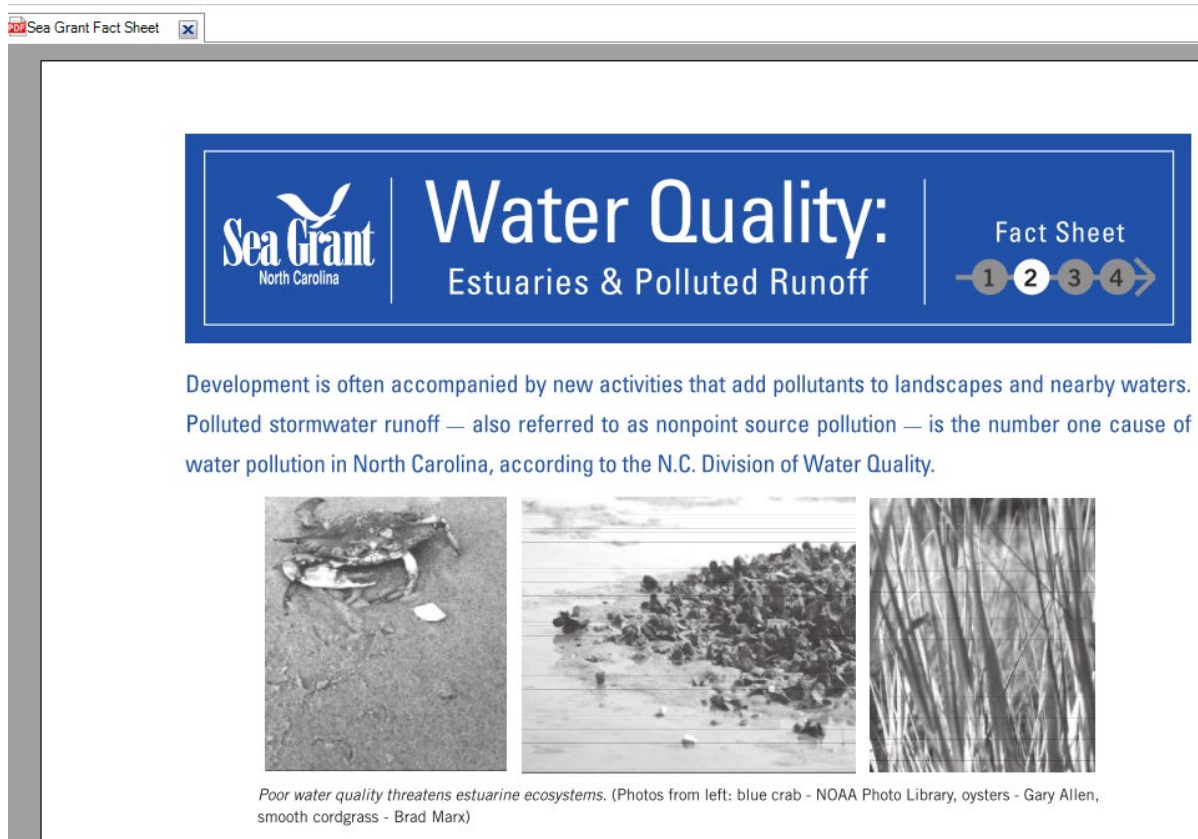
SONJA 00:00 Hello Amma. It's Sonya. Just following up on the in NVivo training we have identified that we can have we can do the training for about three hours on Wednesday Thursday or Friday mornings of next week. And we just want you know if you're available. (Background conversation - yes we have. You said you could) just let me know which which of the day suits you. Thank you.

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- You can play and edit the file while in NVivo Transcribe and assign speaker.
- Once transcribed and edited, then export either as .docx or .rtf.
- This file is now ready for import into your NVivo project

Working with PDFs

- Select *Literature* in **Files**, r-click in the white space and select Import PDFs or go to **Import** tab, in the Import Group, click **PDFs**.
- Import from *Sample Project Data\Other Data*, select pdf file, *Sea Grant Fact Sheet*.



Working with Web Content

- In **Navigation** view click **Files**, and then select *Web Content*. (This is the folder where you will store your NCapture data).
- Open a web browser (Internet Explorer or Chrome) from your internet browser open Google and type in North Carolina Sea Turtle Project, to capture the home page of the organisation North Carolina Sea Grant: <http://www.ncseagrants.org/>

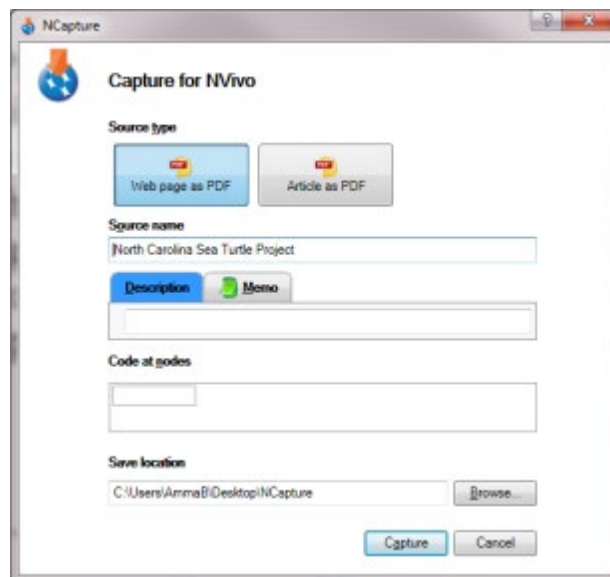
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- From the web browser, locate and click on **NCapture**, which is an add-on included with the software download. Select the **NCapture** button (see below)



and NCapture dialogue box opens. You can select as either of the following

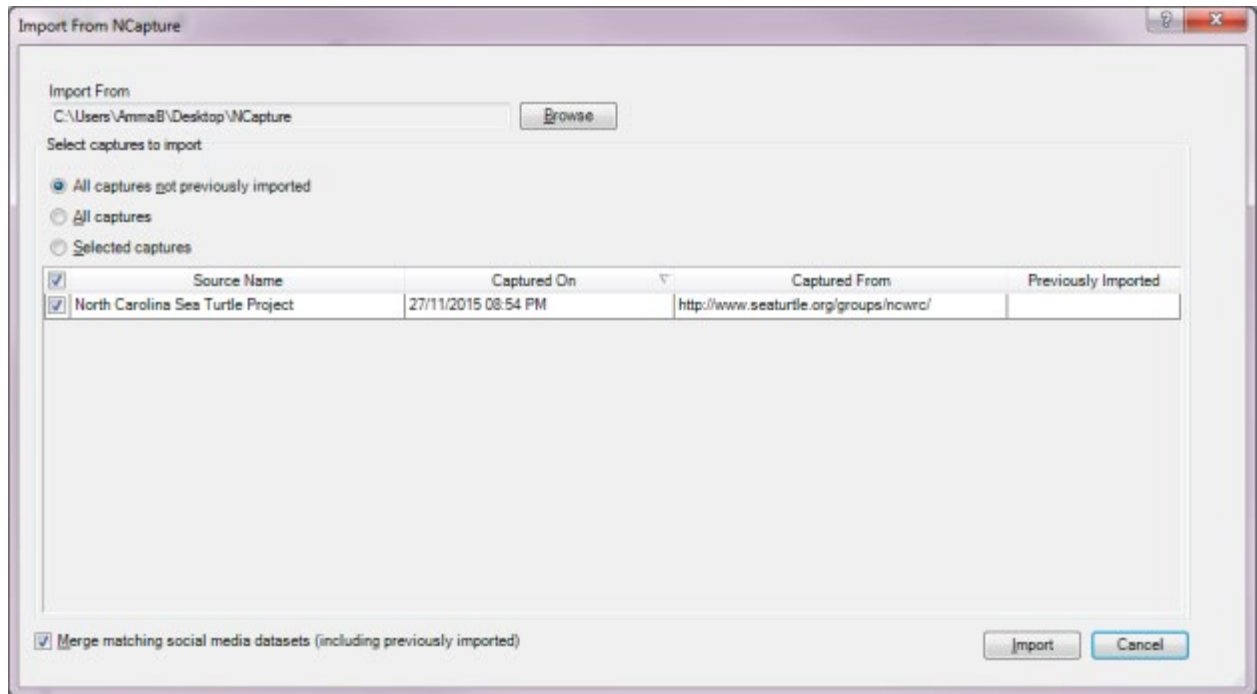
- Web page as PDF captures a webpage
- Article as PDF strips out all extraneous content and just includes the article
- Save location is *Desktop* and select **Capture**



Import NCapture into NVivo project

- Select **Import** tab on Ribbon, select **NCapture**

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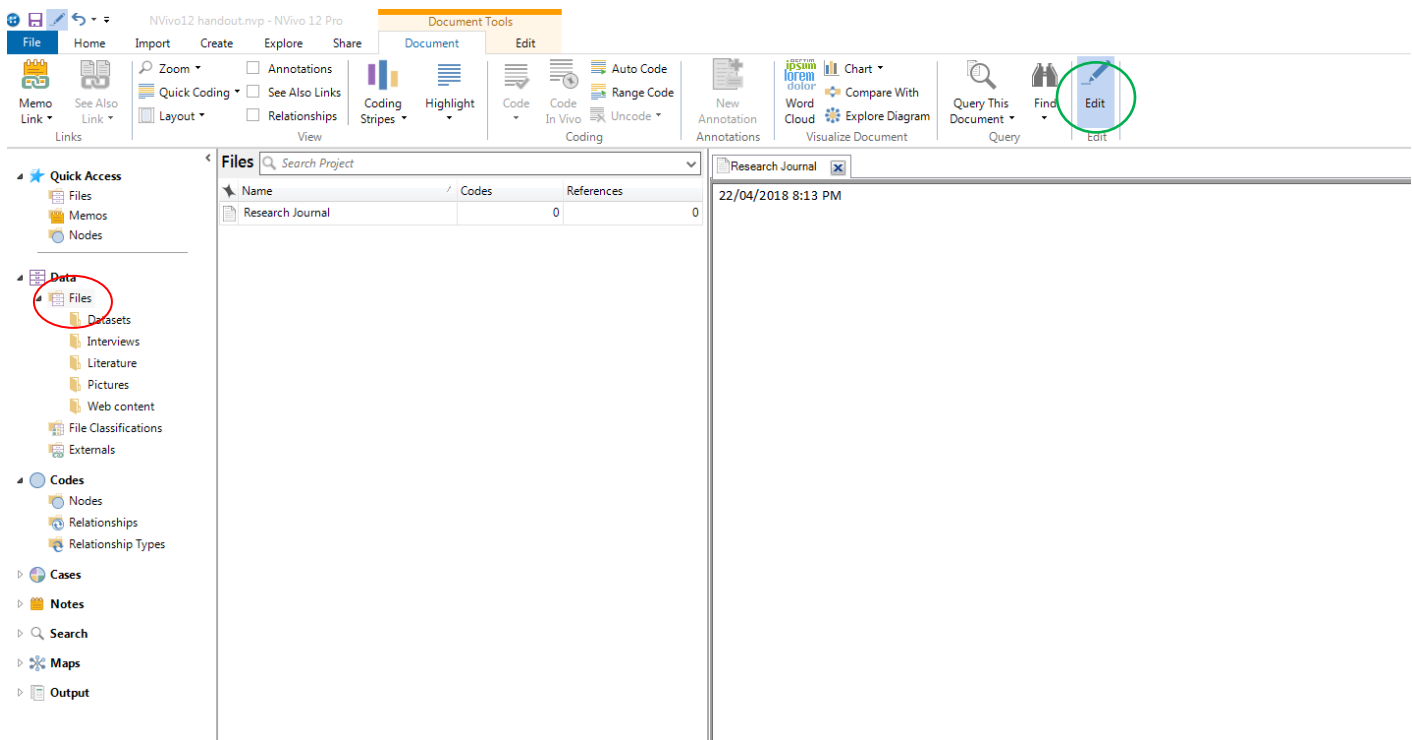
- Click **Import**
- Open *North Carolina Sea Turtle Project*

Note: default save location is **Documents/NCapture**

Creating a source within NVivo

- Create *Research Journal* document/memo
- Go to **Create** on ribbon in **Data** and create **Document** (will be stored in root **Files** folder – **circled**). Name the file *Research Journal*. It will automatically open.
- To insert **Date/Time**, click with the blank document, **Document Tools** will open in the Ribbon. Select **Edit** (**green circle**), then **Insert** in Editing area and **Insert Date/Time**. Short cut keys for this function are **Ctrl, Shift and T**.
- Type in text

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PART 4: CODES

- Create a node folder, create a node
- Code at new and existing nodes: drag & drop, Quick Coding bar (**auto suggest**), *In Vivo*
- Open a node: tabs, revert to file, code on, uncode, highlight, coding stripes
- Managing nodes: move, merge, rename, aggregate coding, color a node, expand/collapse hierarchies, sort
- Auto Coding documents by heading

Creating different types of codes and coding

Create a new node

Create a new node (*sitting under root node*)

- In Navigation view under **Codes** select **Nodes**
- On the **Create** tab select **Node** or right click in the white space, select **New Node** and enter the name of the new node.
- Create 3 nodes, *Environmental Change*, *Jobs* and *Tourism*
- Creating nodes in this way can occur throughout the project

The screenshot shows the 'New Node' dialog box in NVivo 12. The 'General' tab is selected. The 'Name' field is empty. The 'Description' field is a large text area, also empty. The 'Nickname' field is empty. The 'Hierarchical name' field is pre-filled with 'Nodes\\'. Below these fields, there is a checkbox labeled 'Aggregate coding from child nodes' which is unchecked. To the right of this checkbox is a 'Color' dropdown menu currently set to 'None'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

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Coding using coding selection

The screenshot shows the Nvivo12 interface with an interview transcript for Barbara. The transcript includes an introduction and several questions from Henry. A portion of Barbara's response is highlighted in black. The 'Select Code Items' dialog box is open on the right, showing a list of nodes: Environmental change, Jobs, Tourism, Relationships, and Cases. The 'Nodes' category is expanded, and the 'Environmental change' node is selected. The dialog box also has a search bar, a 'New Node' button, and 'OK' and 'Cancel' buttons.

Barbara

Click to edit

Interview with Barbara on February 19th, 2009 at her home in Bettie, North Carolina. Barbara writes cooking curriculum materials and does earth science environmental consulting work for soil scientists.

Q.1. Connection to Down East

Henry
Tell me about your personal and family history in Down East. How long have you or your family been living Down East full time or part time?

Barbara
My family moved here when I was two years old in 1969. My parents still live here. They live down in Gloucester. But I was raised in Beaufort, in town, and went to Beaufort Elementary and middle school and high school, then moved away for college. So I've lived here most of my life although I've moved away

Henry
And you've lived Down East how long?

Barbara
Since '96. My husband and I bought this little cottage in '96.

Henry
And have you lived here full time since then or is it a part time – seasonal?

Barbara
It's part time. It was full time, but then in 2000 he got a job up North. And so since then we've been here on a very sporadic schedule. Sometimes full time but not always, because of my work down here – I was doing some environmental fieldwork down here that's kept me down here while he was up there.

Henry
I see. So – but you were not born in Carteret County, but you lived most of your life one way or the other there –

Select Code Items

Search (CTRL+F)

Nodes

- Environmental change
- Jobs
- Tourism
- Relationships
- Cases

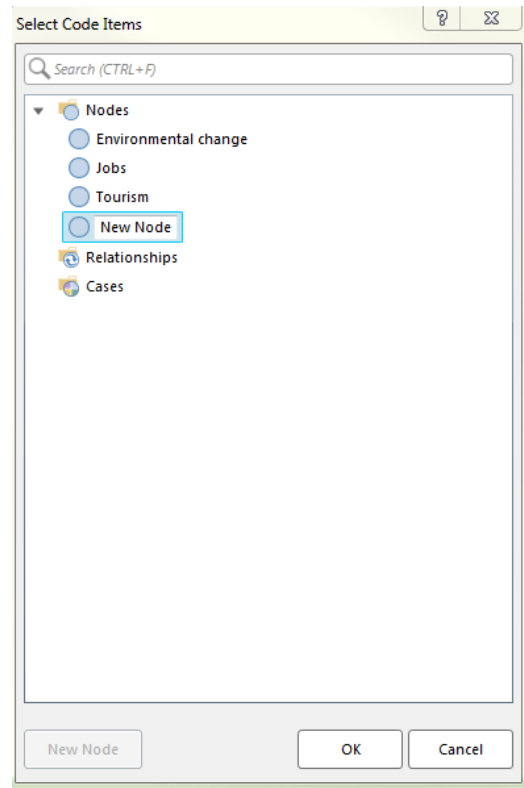
New Node OK Cancel

- Highlight a selection of text and right click, **Code Selection**, then select **Code**
- Select *Environmental Change* in the **Select Code Items** box
- Can multiple code using this process, use Control key and then select multiple nodes

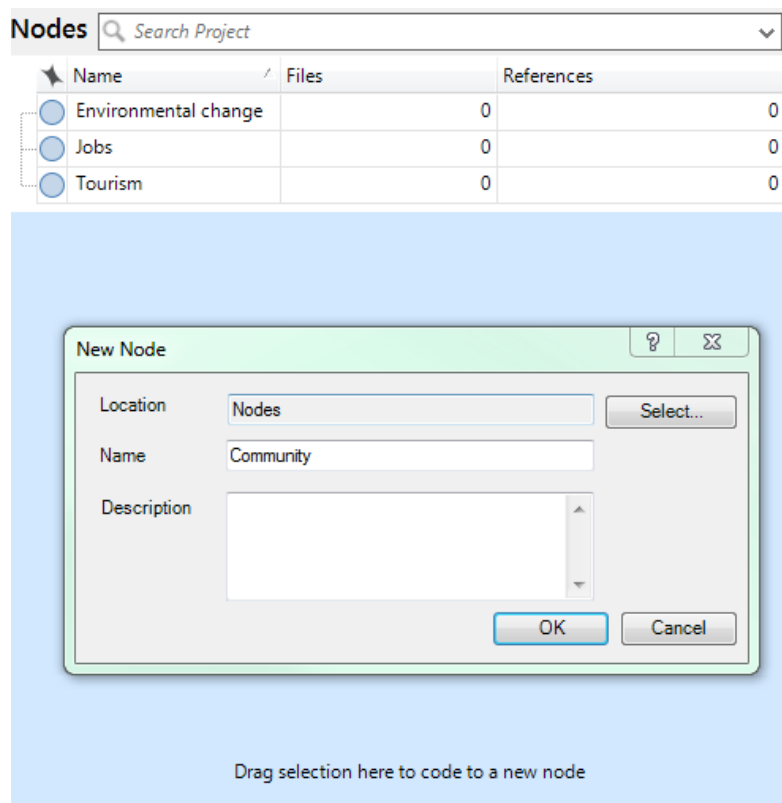
New nodes

- Can also create a **New Node** by selecting New Node (bottom left). Then type in the name of the new node.

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- Another way is to drag the selected text into List View and a new node box will appear



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Drag and Drop

- Select a piece of text and drag into identified node in **List View**

The screenshot shows the Nvivo12 interface. On the left, the 'Nodes' list is visible with columns for Name, Files, and References. The nodes listed are Environmental change, Jobs, and Tourism. On the right, a text document is open, showing a conversation between Henry and Thomas. A red box is overlaid on the text, containing the instruction: 'Select text and hold down left mouse button and drag and drop into selected node'.

Name	Files	References
Environmental change	0	0
Jobs	0	0
Tourism	0	0

Henry
What appeals to you about the area? And what, as you've gotten to know the area, do you see as unique about Down East?

Thomas
The beauty of the area is the main attraction. I like the remoteness of the area. I like that it's low density. And fishing. I love to flounder gig. That's probably my biggest passion in my life. Nothing commercial. It's just a good place I thought to put roots down and finish up my working years and retire.

Q.4. Community and Environmental Change

Henry
Since moving here, what changes have you seen?

Thomas
Since the late 90's this area has really experienced a boom. It's a changing area. There's a lot of people moving to the area. There are a lot of military people, is a part of it. But this area has been found, there is no question about it. Especially growth on the mainland—in the 1990s, we had 5 or 6 hurricanes in six years. People started getting tired of getting beat-up on the beach. This was when this area, the true Down East area, started getting pressured as far as development.

Henry
Do you think this development is changing the community?

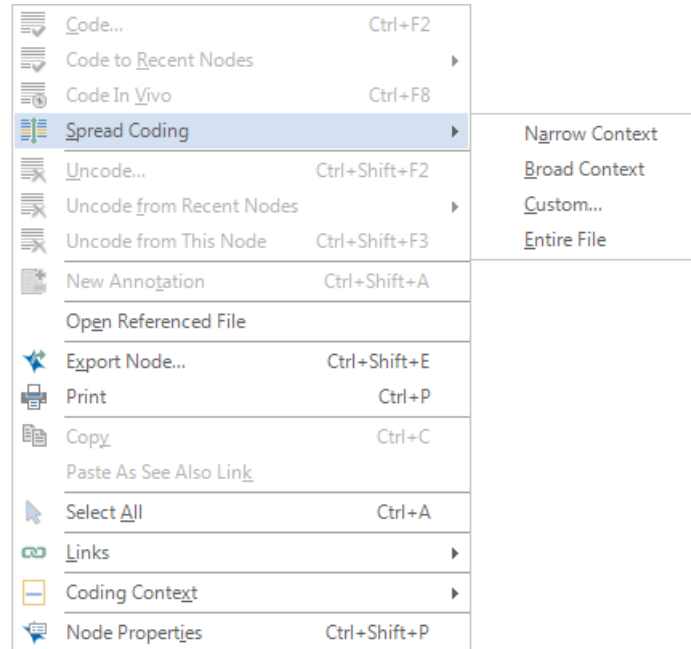
Thomas
It's probably not conventional in keeping with Down East. But the type of development that was coming in was coming fast and furious. People were looking for pieces of land. This was hot as far as real estate. Values were going up. We had properties that people heard was going on the market. They didn't even list it. There was one tract that was like seven people bidding on the property and it was going up week by week. There was that kind of pressure. Everything was just getting built up without thinking about the consequences.

Code In Vivo

You can create a node based on selected content – this is called 'in vivo' coding which in Latin means 'in life' or 'a living thing'. In qualitative methods it refers to the practice of drawing codes as much as possible from participants' own words.

- Select the text content you want to code into a document, PDF etc
- Document Tools will open in the Ribbon. In the Coding Area select **Code In Vivo** (or right click or context menu)
- A node is created with the selected texts as the node name.
- Open the node and hover over the coded word/s, r-click and select spread coding, there are a number of options available

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Creating Node Folders

Node folders (like File folders) can be created to manage the different type of nodes in your project.

In this example Node folders are created for *Autocoded Responses*

- In Navigation View, under Codes, select **Nodes**, then right click and create a **New Folder**.
- Name the folder *Autocoded Responses*

Folders can be created at any time in project and drag and drop used to move existing nodes into the relevant folder

Viewing nodes and coding

All material coded at a node can be viewed by opening a node in Detail View.

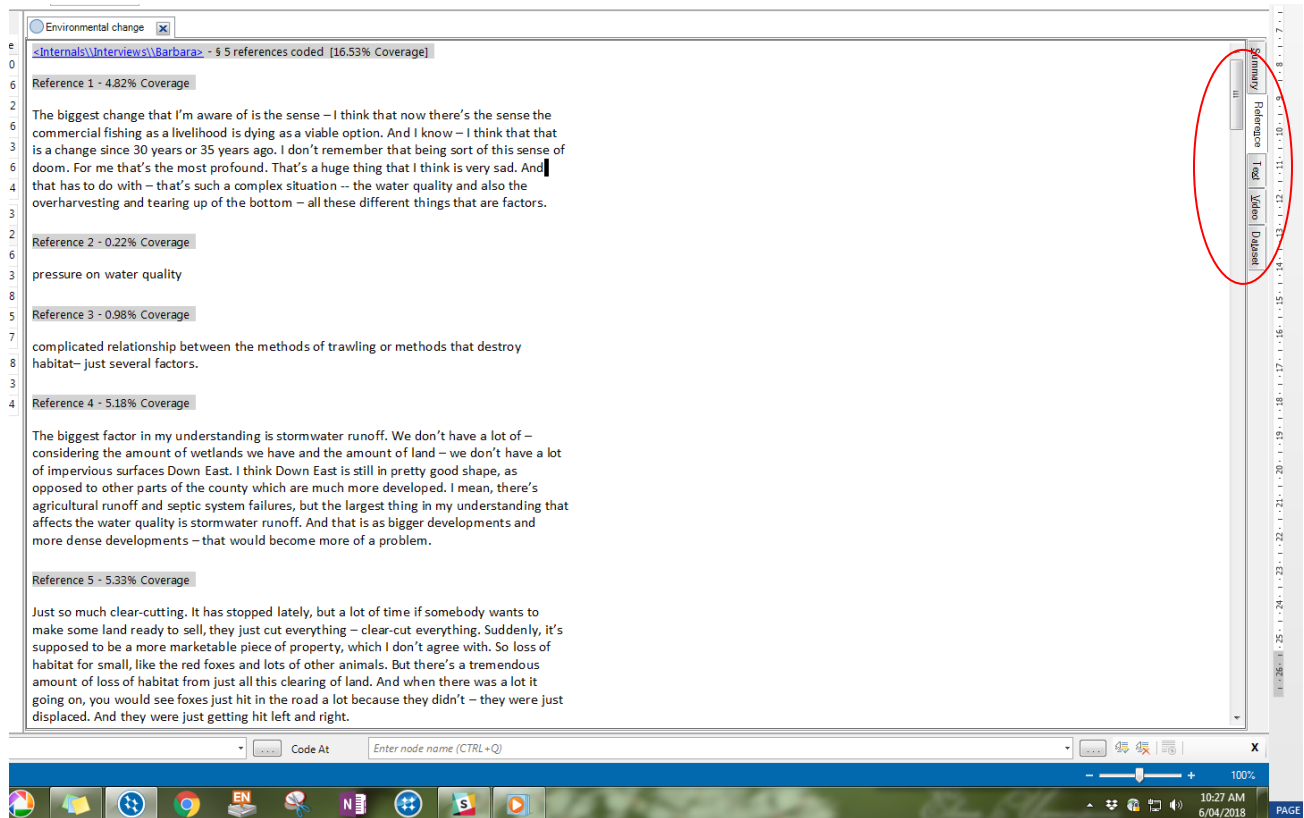
When you open a node it is a 'live' view of the codes. If you make a change in the file, such as correcting spelling it will be update immediately in the node.

In this example, we will look at the *Environmental change* node.

- Double click the node *Environmental Change* and the node opens in Detail View. Note the series of tabs on the right side of the Detail View window
- By default the node opens to the **Reference** tab, which shows the content of all coded text materials displayed by file

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- The **Summary** tab, lists all the **Files** coded at this node by file type, e.g. document, PDF etc
- Click on the **Text** tab and there are separate thumbnails related to each text file coded
- If coding was at other items, e.g. dataset or picture these tabs will appear below the Text tab. (See area circled)



Coding from a node or 'coding on'

Content can be coded to new or existing nodes from other existing nodes as well as **Files**. The process of coding from one node (working in the virtual space) to another node is known as 'coding on'.

Unicode

To unicode from a node

- Open the node and click the Reference tab to show content coded at this node
- Select the passage that you wish to unicode
- Using the r-click methods, **Unicode Selection**, select the **Node** and the selected content will be uncoded

Uncoding from a file

- Open the file and select the passage to be uncoded

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- Using the r-click methods, **Uncode Selection**, select the **Node** and the selected content will be uncoded
- Only nodes at which the selected text has been coded will be available

Several other methods for uncoding are described in NVivo Help.

Coding Stripes

Coding stripes are coloured bars that are displayed in detail view and enable you to see:

- Nodes that code content
- Coding by Specific NVivo users (if working as part of a team)

Opening coding stripes

- Open a file or node and click into Detail View. On the Ribbon, the Document Tools or Node Tools tab will appear, in the **Coding** group, click the arrow below **Coding Stripes** and then click **Recently Coding**
- **Coding Stripes** are displayed in the right margin for up to seven nodes. For more stripes go to File/Options and select the Display tab, under Coding Stripes you can increase the maximum number of stripes.

Managing nodes

Using software to conduct your research gives you flexibility. You may want to move nodes into different folders, organize or re-arrange them and/or merge some nodes together. Before rearranging your nodes, save the project and make a back-up copy.

Move nodes

- Create a new node **Natural Environment**
- Select the node *Environmental Change* and r-click and click **Cut** (or **Copy**)
- Then select the node *Natural Environment* and **Paste**, the node *Environmental Change* is now a sub-node of the parent node

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Nodes			
	Name	Files	References
	Jobs	0	0
	military people	1	1
	Natural Environment	0	0
	Environmental change	0	0
	Tourism	0	0

Merge nodes

Sometimes two or more nodes are created with similar meaning or purpose. Over time, you may decide to merge these nodes into a single node.

- Select the node to be merged into another node. R-click and select **Cut** and then click the target node to merge into, select **Merge into Selected Node**
- Select **OK**

The coding at both now has now been combined in the target node

Rename a node

The name of the node can be changed in **Node properties**.

- R-click on selected node and **Node Properties** dialog box opens
- Enter a new name for the node
- Click **OK**

Expand and collapse node hierarchies

- R-click on anywhere in node framework and choose **Expand** or **Collapse All Nodes**. The selected setting will persist for the current NVivo session.

Auto Coding

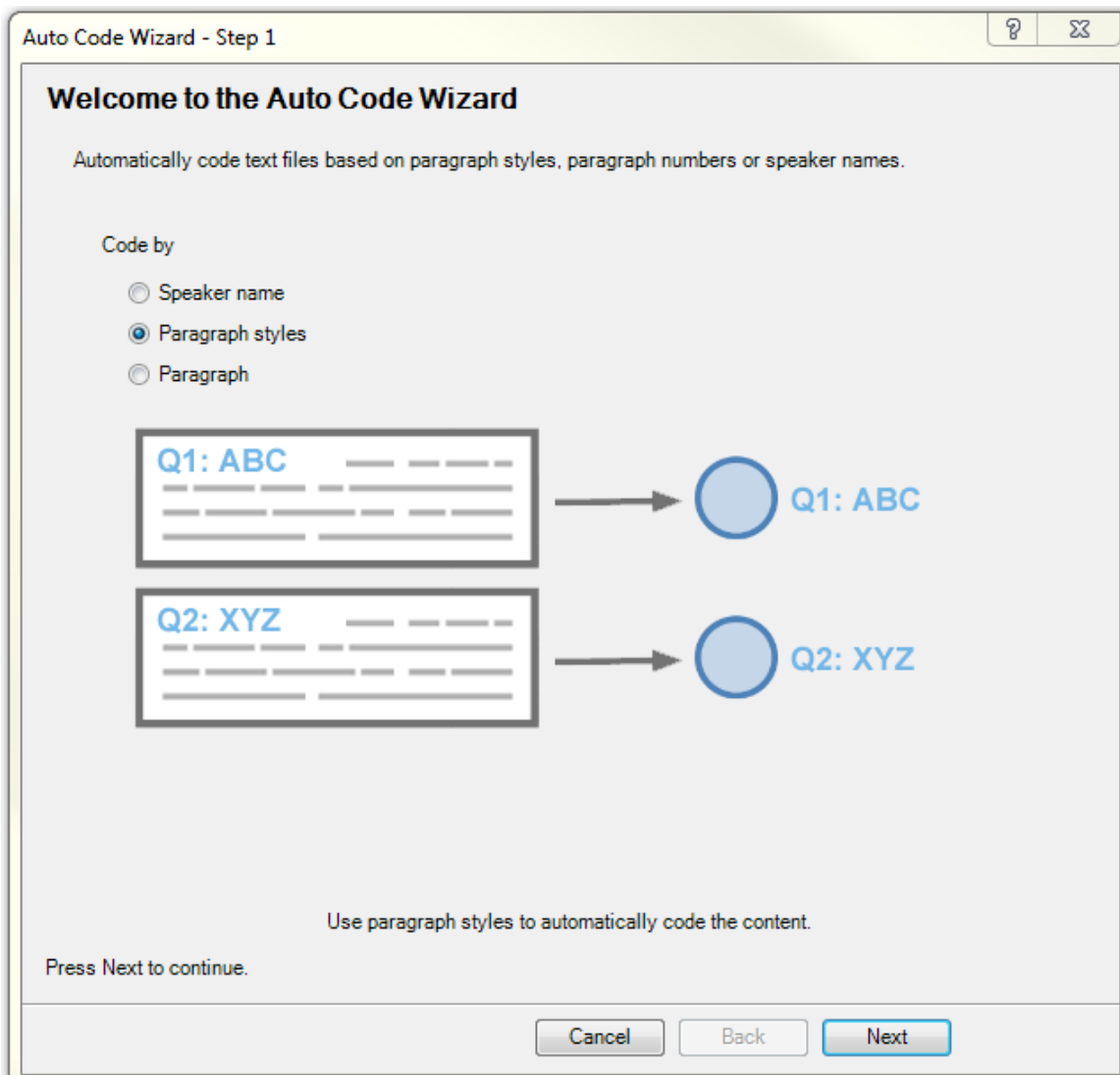
While coding is typically a process involving careful reading and sorting of data there are times when coding means more as a means of gathering groups of data.

Auto code documents

In a highly structured interview or focus group, it may be useful to gather together all responses to a particular question or topic. Heading Styles, inserted into transcripts prior to or following import, can be used to create nodes for this purpose.

In this example, we will auto code interviews (*Barbara, Charles, Dorothy etc.*) by interview question

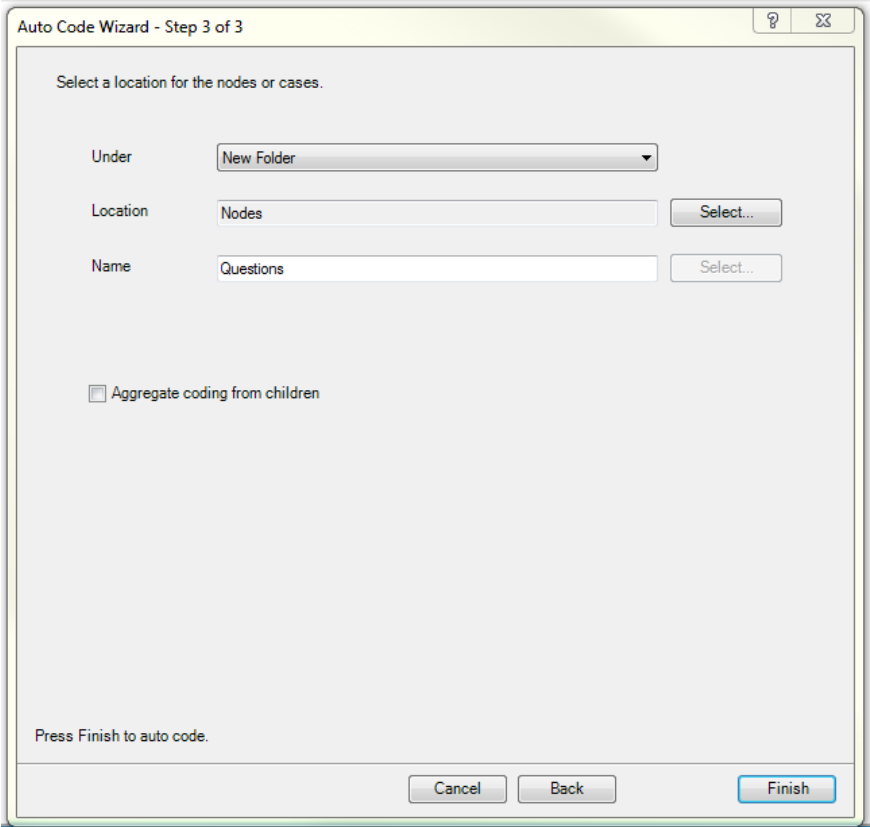
- In the Navigation View, click **Files** and then the *Interviews* folder. Hold down the CTRL key and click the Interview documents (e.g. *Barbara, Charles, etc.*)



- In the Auto Code Wizard (Step 1) select **Paragraph Styles** and then Next
- Click **Heading 1** and then click the right arrow >> (Step 2 of 3). Click Next

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- In the **Select a location for nodes or cases**, under Existing Node or Case, click the down arrow and choose **New Folder**, under **Name** type in *Questions*



Auto Code Wizard - Step 3 of 3

Select a location for the nodes or cases.

Under: New Folder

Location: Nodes Select...

Name: Questions Select...

☐ Aggregate coding from children

Press Finish to auto code.

Cancel Back Finish

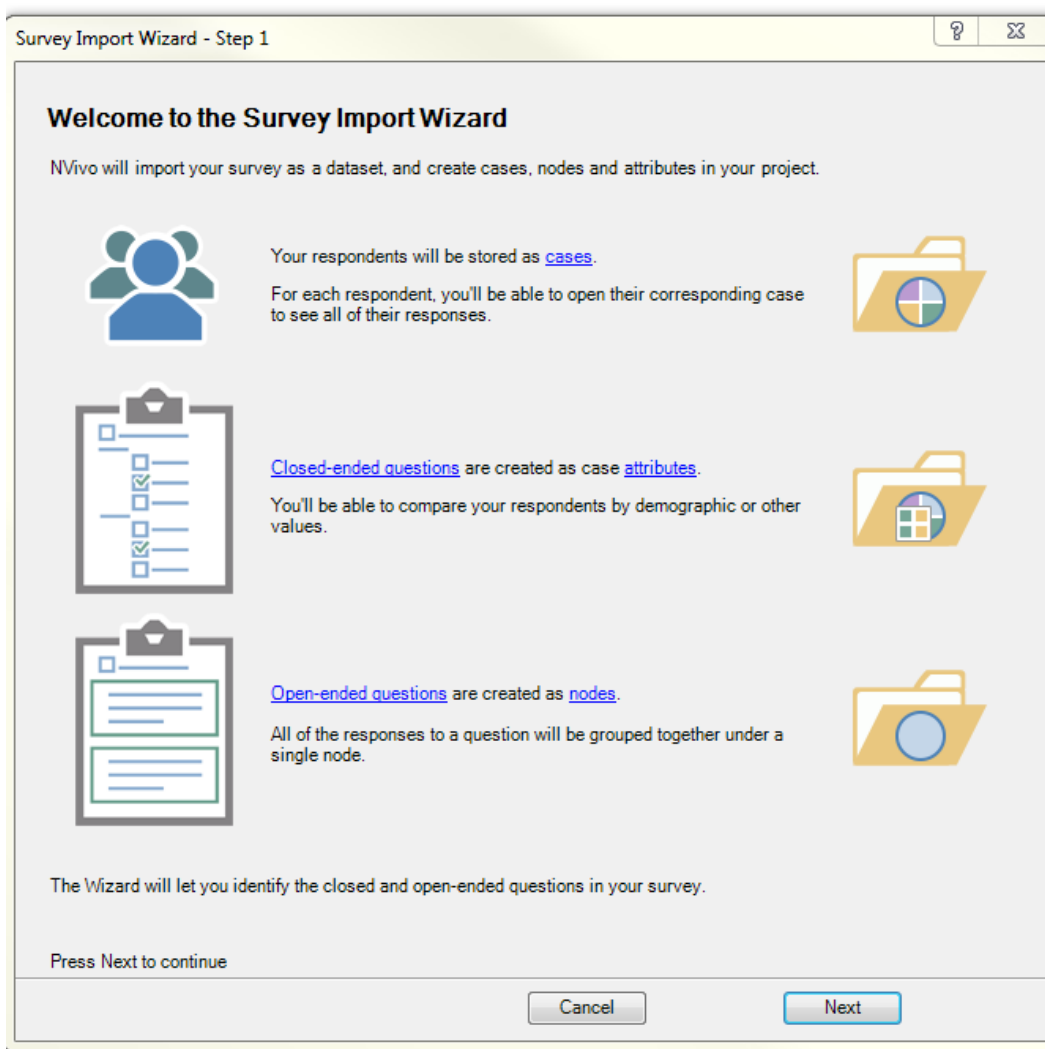
- Click Finish
 - To see the results of auto coding locate *Questions* as a sub-folder under **Nodes**

Questions			
Name	Files	References	
Q.1. Connection to Down East	8	8	
Q.2. Connection to Down East natural environment	8	8	
Q.3. Professional perspective on Down East	6	6	
Q.4. Community and environmental change	8	8	
Q.5. Vision for the future of Down East	8	8	
Q.6. Barriers to and opportunities for achieving your vision	6	6	
Q.6. Barriers to or opportunities for achieving your vision	1	1	

Each node include the responses from all participants to interview questions

Working with Surveys (different type of autocoding)

- Import **Survey** (can import Excel; Survey Monkey; Qualtrix; SPSS; text file or ODBC connection to Access) utilising a Wizard that includes a number of steps. Data must be cleaned prior to import as it cannot be altered once it has been imported into NVivo.
- Wizard will store respondents as cases; create closed opened responses as attributes (demographics) and create open-ended responses as nodes,



- Browse to Sample Project Data/Survey Data, select Survey data xls.
- Select next
- Step 2: Wizard will show data format.
- Select next

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Survey Import Wizard - Step 2

Check your data format

How many rows are used for your questions?

What order are your dates in?

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

survey data	variable explanations				
Respondent	ReturnDate	Township	Community	Generations Down East	Commercial
DE001	14/12/2004	Straits	Straits	none	0
DE002	17/12/2004	Harkers Island	Harkers Island	3 or more	0
DE003	11/12/2004	Marshallberg	Marshallberg	3 or more	0
DE004	16/12/2004	Smyrna	Williston	3 or more	0
DE005	4/12/2004	Straits	Gloucester	1	0
DE006	7/12/2004	Straits	Bettie	3 or more	0
DE007	9/12/2004	Marshallberg	Marshallberg	3 or more	1
DE008	7/12/2004	Straits	Otway	1	1
DE009	15/12/2004	Marshallberg	Marshallberg	3 or more	0
DE010	11/12/2004	Stacy	Stacy	3 or more	0
DE011	3/12/2004	Stacy	Stacy	3 or more	0
DE012	15/12/2004	Smyrna	Williston	2	0
DE013	9/12/2004	Straits	Straits	3 or more	0
DE014	18/12/2004	Straits	Bettie	1	1
DE015	8/12/2004	Sea Level	Sea Level	3 or more	0
DE016	7/12/2004	Sea Level	Sea Level	3 or more	0
DE017	7/12/2004	Cedar Island	Cedar Island	3 or more	1
DE018	8/12/2006	Straits	Gloucester	3 or more	1
DE019	7/12/2004	Sea Level	Sea Level	3 or more	1
DE020	11/12/2004	Straits	Straits	none	0
DE021	9/12/2004	Cedar Island	Cedar Island	3 or more	0
DE022	14/12/2004	Atlantic	Atlantic	3 or more	1

Press Next to continue

- Step 3: Storage parameters, select unique ID and classify data
- Select next

Survey Import Wizard - Step 3

Manage your survey respondents

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

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

Select a unique ID for each of your cases

Your cases will be grouped together in a classification

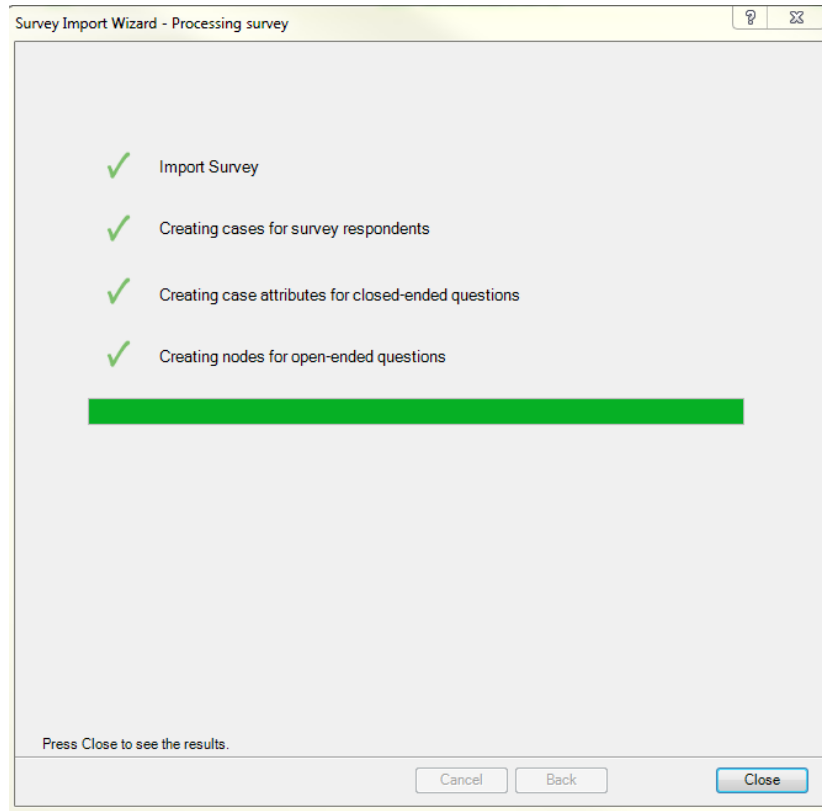
☒ Create new classification

☐ Add to existing classification

Press Next to continue

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- Step 4 Allows identification of open-ended and closed-ended responses
- Select Finish



- Open the dataset from List View

ID	Respondent	Township	Community	Generations Down East	Pace of development	The natural environment Down East is	The water quality Down East is	Commercial fishing Down East is
1	DE001	Straits	Straits	none	undecided	beautiful	good	good
2	DE002	Harkers Island	Harkers Island	3 or more	too fast	good	good	in trouble
3	DE003	Marshallberg	Marshallberg	3 or more	too fast	peaceful, beautiful serene -	most important to maintain	important to an area
4	DE004	Smyrna	Williston	3 or more	too fast	becoming poorer with pollution due to chemical runoff from local farms. It has ruined the fishing business.	being reduced by pollution	almost destroyed due to pollution
5	DE005	Straits	Gloucester	1	about right	an important part of the area	excellent	a thing of the past
6	DE006	Straits	Bettie	3 or more	too fast	good	good	almost gone
7	DE007	Marshallberg	Marshallberg	3 or more	too fast	perfect!	good	dying

- Qualitative data can be coded into the project

Exercise 1: Revision Exercise

- **Import *Helen* (audio file)**
- Add in additional column (File/Information/Project Properties/AudioVideo tab)
- Name the column *Themes*
- Listen to the audio and transcribe about 2 minutes into the **Contents** area
- Code a section of the contents to a new node called *Real Estate* that is a sub-node under *Economy*.

PART 5: BEYOND CODING – LEXICAL QUERIES

- Exploring Text
- Create a Text Search Query (Including full set of node tabs in Preview, plus new Word Tree)
- Create a Word Frequency query
 - Work with Word Frequency Query Results (Including new Tree Map and Cluster Analysis displays]
- Managing Queries
 - Modify a query
 - Save a query
 - Save query results

Create a Text Search Query

- On the **Explore** Ribbon, under **Query** select **Text Search Query**
- Search for *job*, *employment* and *wage*. Move the **Finding Matches** slider to **With Stemmed Words**
- Click **Run Query**

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Name	In Folder	References	Coverage	Percentage
Barbara	Files\Interviews	6	0.32%	0.32%
Charles	Files\Interviews	11	0.55%	0.55%
Dorothy	Files\Interviews	7	0.53%	0.53%
Margaret	Files\Interviews	23	1.04%	1.04%
Robert	Files\Interviews	26	1.19%	1.19%
Sea Grant Fact Sheet	Files\Literature	7	0.21%	0.21%
Survey data	Files\Datasets	17	0.01%	0.01%
Susan	Files\Interviews	7	0.27%	0.27%
Thomas	Files\Interviews	1	0.14%	0.14%
William	Files\Interviews	5	0.29%	0.29%

- A **Text Search Query – Results Preview** opens in Detail View. The **Summary** tab (right hand side) displays a list of all **Files** containing at least one instance of any stemmed words.
- Click the **Reference** tab to see each word found in the context of surrounding words. The finds are grouped by file.
- To see any overview of how the words appear, the bottom tab **Word Tree**, present the most frequently appearing Root term first.

businesses that would create
But until we get good development that creates
does . You've got to have
got to be good stable
need to be some decent
obvious need for well paying
good grocery store and
they go off to
other
Also, give localities some flexibility .
It might be there would
and how do you balance
here , to keep people here .
so our young people would
aren't ecotourism , too .
can keep people here .
that

- To display other terms, go to the top left and select the Root Term drop down for other words in the search.

Exercise 2: Compare search results

Use your current project to play with some text searches.

- First do a **Text Search Query** on the word '**fish**' as a stemmed search.

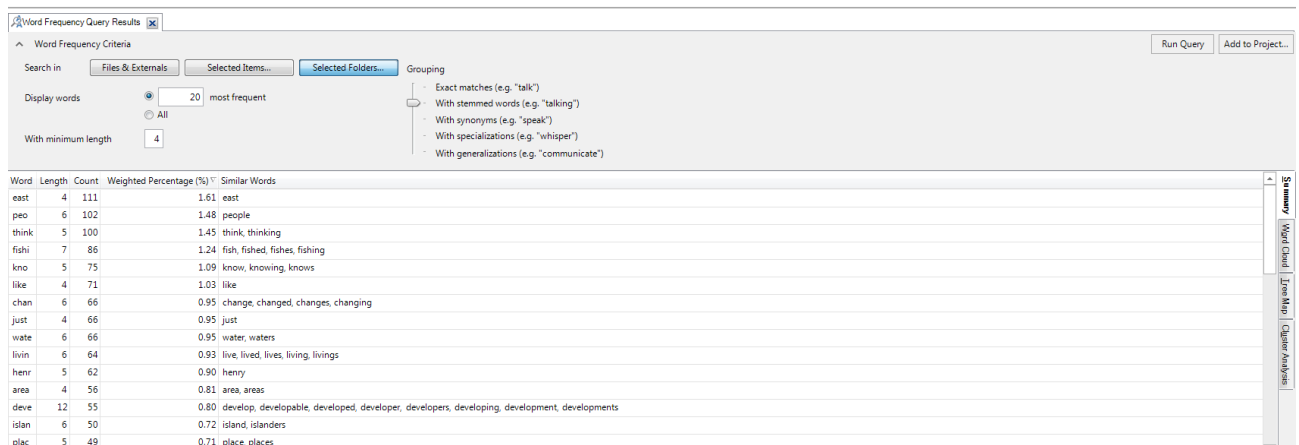
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- Then compare it with a text search on '*fish**' (the asterisk allows for any letters coming after fish).
- For both searches, explore the Word Trees produced.
- How many files and references were there in each?

Create a Word Frequency Query

This query will generate a list of words most frequently appearing in text in your project.

- On the **Explore** Ribbon, under **Query** select **Word Frequency Query**
- Establish the parameters for the search, in this example *What are the most frequently occurring words used by Interview participants (20 most frequent with 4 or more letters)*.
- Select **With stemmed words** on the Grouping slider
- From the **Search in** area click **Selected folders** and then navigate to the sub-folder *Interviews*
- Select the 20 most frequently occurring words with word length minimum of 4.



Word	Length	Count	Weighted Percentage (%)	Similar Words
east	4	111	1.61	east
peo	6	102	1.48	people
think	5	100	1.45	think, thinking
fishi	7	86	1.24	fish, fished, fishes, fishing
kno	5	75	1.09	know, knowing, knows
like	4	71	1.03	like
chan	6	66	0.95	change, changed, changes, changing
just	4	66	0.95	just
wate	6	66	0.95	water, waters
livin	6	64	0.93	live, lived, lives, living, livings
henr	5	62	0.90	henry
area	4	56	0.81	area, areas
deve	12	55	0.80	develop, developable, developed, developer, developers, developing, development, developments
islan	6	50	0.72	island, islanders
plac	5	49	0.71	place, places

- The **Summary** tab (right hand side) displays words in descending order of frequency, the list of words sorted alphabetically by word, by word length by count of weighted percentage (frequency of word by character count).
- **Word Cloud**, second tab on the right displays the 20 most frequently appearing words. The size and density of font indicates frequency, the larger the word the more frequently it appears.



Modify and save a query

In order to modify a query, the software enables you to return to the last run query.

- On the **Explore** ribbon tab, select **Last Run Query**
- The **Search Query** dialog box will open and you can modify the search or the search parameters.
- To save a query, go to the right hand side of the Text Frequency Search box, and select **Save Results** and select the ways to store the query and where to save it.
- Under **Options**, you can save as a new code or case or merge with previous results
- In the **Location** section, the default is to save under Search area in Navigation view within the sub-folder **Query Results**. However you can also save as a new code to your coding framework under **Nodes**

Text Search Query - Results Pre [X]

Text Search Criteria

Search in: Files & Externals | Selected Items... | Selected Folders... | Find

Search for: fish | Special

Spread to: None

Find options:

- Exact matches (e.g. "talk")
- With stemmed words (e.g. "talking")
- With synonyms (e.g. "speak")
- With specializations (e.g. "whisper")
- With generalizations (e.g. "communicate")

Buttons: Run Query | Save Results... | Add to Project

Name	In Folder	References	Coverage
Barbara	Files\Interviews	6	0.32%
Charles	Files\Interviews	11	0.55%
Dorothy	Files\Interviews	7	0.53%
Margaret	Files\Interviews	23	1.04%
Robert	Files\Interviews	26	1.19%
Susan	Files\Interviews	7	0.27%
Thomas	Files\Interviews	1	0.14%
William	Files\Interviews	5	0.29%

Summary | References | Full Word List

Cancel a query

At times, it may be necessary to interrupt processing of a large query, you can cancel it. On the status bar, click **ESC**.

PART 6: WORKING WITH BIBLIOGRAPHICAL INFORMATION

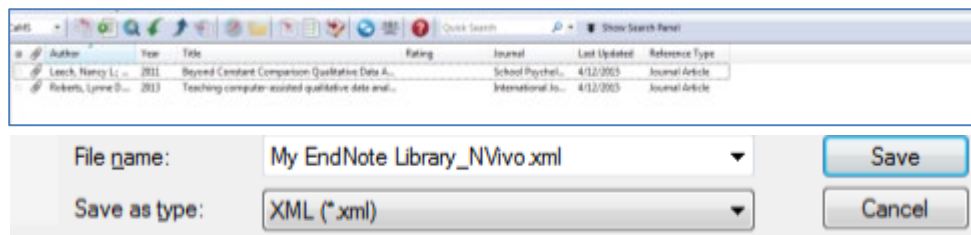
Information can be imported from referencing management software such as:

- EndNote
- Zotero
- RefWorks
- Mendeley

If file content is included in the referencing management software, for example a PDF of journal article it can be imported into NVivo as a **File**. If there is no accompanying file it will be created under **Externals**. In the following examples we will use EndNote as the referencing management tool.

Importing bibliographical data

- From your Endnote library export select the reference you want to import into NVivo and save as .XML. Go to File in Endnote and then select export.



- In NVivo on **Import** tab, in the **Bibliography** group, select **Endnote**;
- Browse to the location of your saved EndNote exported file and click **Open**;
- The Import from Endnote dialog box opens;
 - Select Author and Year
 - Check to see number of records to be imported
 - Select sub-folder *Literature* under **Files**
- Click **Import**

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Import from EndNote

Import from
C:\Users\AmmaB\Desktop\My EndNote Library_NVivo.xml

File encoding

Name sources by: Author and Year

Assign sources to: A single classification (Reference)

Already linked
0 of 2 records in your reference library are already linked to existing NVivo sources

☒ Replace classification and attribute values of existing sources

☒ Replace memo contents with abstract, keywords and notes

☒ Assign attribute values to memos

To be linked
0 of 2 records in your reference library will be linked to existing NVivo sources

☒ Replace classification and attribute values of existing sources

☒ Replace memo contents with abstract, keywords and notes

☒ Assign attribute values to memos

Import new
2 of 2 records in your reference library will not be linked to existing NVivo sources

☒ Import unmatched records as new sources

Create internals in: Internals\Literature Select...

Create externals in: Externals Select...

☒ Import source content from file attachments, URLs or figures where available

☒ Create memos from abstract, keywords and notes

☒ Assign attribute values to memos

Advanced... Import Cancel

Note: Files cannot be imported when:

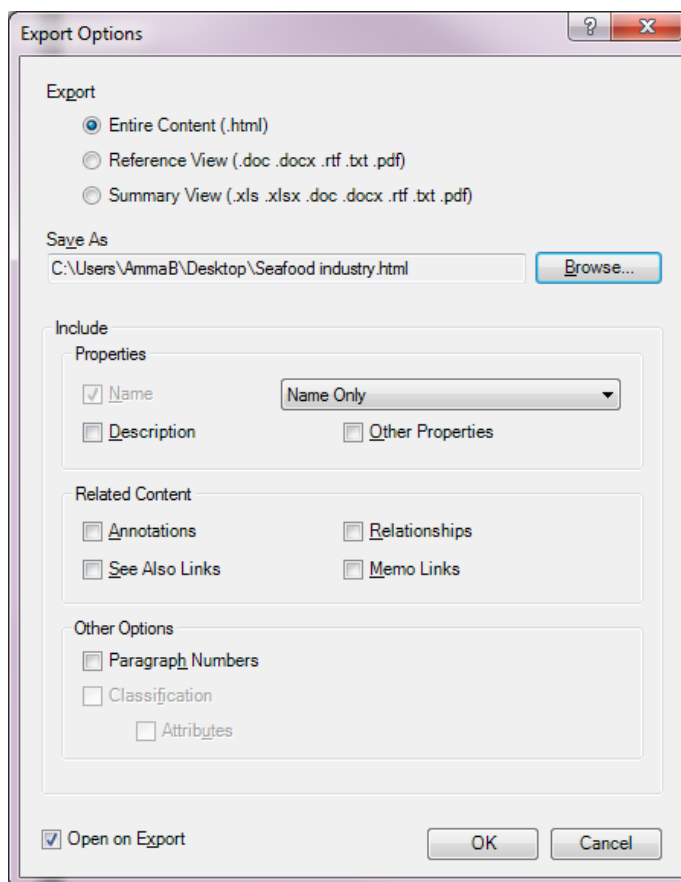
- The file is password or copy-protected
 - Is not a supported format
 - If the reference library is not on your computer or network drive
- You will find the imported files in the folder that you selected on import. To see classification details: Click on .pdf files in **Detail View**, go to **Home** tab and select down arrow on **Open**, then select **Classification Sheet**. These are also stored in individual files, located in PDF properties as **Attribute Values**.

Name	Nodes	References	Created On	Created By	Modified On	Modified By
Leach, Nancy L.; Groughebaud, Anthony J. (2012) - 1		0	0 4/12/2015 5:03 PM	AB	4/12/2015 5:03 PM	AB
Roberts, Lynne D.; Green, Lauren J.; Syme, Maxine (2012) - 2		0	0 4/12/2015 5:03 PM	AB	4/12/2015 5:03 PM	AB

PART 7: EXPORTING ITEMS

Exporting a file/node

- Select item you want to export in List View (could be file or node)
- R-click on item and export e.g. export pdf
- Export options box opens. NVivo will present options based on file format. For example below is a node.
 - Entire contents – export as a html file e.g. internet explorer file (useful if you are sharing work with someone who doesn't have NVivo)
 - Reference – exporting to word doc to write
 - Summary view – export to excel as a list



Output will save to Documents by default, however to have instant access tick **Open on export** box at bottom left of **Export Options** box. (Exporting a media file, the software will ask if you want to export the media and the transcript).

REFERENCES

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“Beyond Constant Comparison Qualitative Data Analysis: Using NVivo. “School Psychology Quarterly 26(1): 70-84.
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