

Introduction to NVivo

A Faculty Exploratory Workshop

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Starting a Project

Deciding to Use NVivo

NVivo is designed to help you manage and analyze data that is not easily reduced to numbers. In NVivo, you can create a project to store documents, organize documents, attach ideas (known as Nodes in NVivo) to text, and find patterns among your ideas. Just like using Microsoft Word, NVivo is a tool that can be used in many ways to achieve your goals. There is not one prescribed way to use the software. This course is designed to introduce you to the basic features of NVivo so that you can manipulate the software to analyze data in ways that complement your research design.

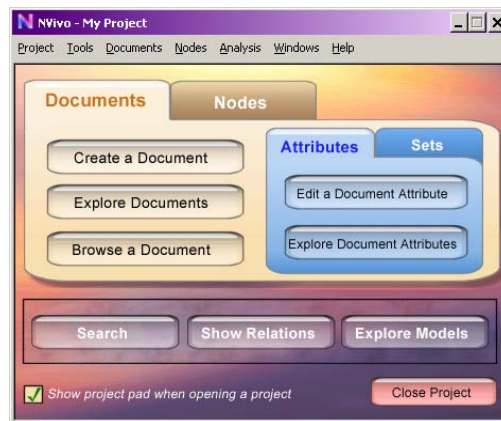
Picture 1: Opening Screen for NVivo

Opening NVivo and starting a new project:

1. Open NVivo (with a normal installation, you should see a QSR folder in your start menu, which contains the shortcut to NVivo).
2. In the **Opening Screen for NVivo** (see Picture 1), select the *Create a Project* button.
3. A *New Project Wizard: Setup* – NVivo dialog box will appear. Select the radio button for *Typical* and click on *Next >*.
4. In the next window, type a name for your project in the *Name:* text box, then click on *Next >*.
5. In the *A New Project Wizard: Review* – NVivo dialog box, review all of your information to ensure its accuracy and click on *Finish*.
6. You will be taken to your Project Pad (see Picture 2).



Picture 2: Project Pad



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Managing Documents

Preparing Your Documents

All documents to be imported into NVivo need to be saved into Rich Text Format (.rtf). Rich Text Format will preserve basic formatting (bold, italics, text color, typeface, font size), but will not preserve tables or images. In NVivo, you can link your tables and images to documents using DataBites (instructions for doing so are included later in this document, but will not be covered in the course).

Helpful tip: Prior to converting your files, create a new folder on your computer where you will store all of your NVivo Rich Text Documents. This folder should be somewhere that you will remember so that you can find it easily later.

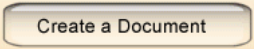
To convert Microsoft Word Documents to Rich Text Format:

1. Open your document in Microsoft Word.
2. Click on the **File Menu** and select **Save As...**
3. In the Save As dialog box, click on the pulldown menu next to *Save as type* and select *Rich Text Format (*.rtf)*.
4. Use the *Save in* pulldown menu to select a location where you will be able to find your newly saved file later.
5. Click on *Save*.

Helpful tip: Name your files so that they help you identify the content of the document. For example, you could name a document *InterviewDebbie051605.rtf* to tell yourself that this document is an interview with Debbie that was conducted on May 16th, 2005.

Importing Your Documents

To import your Rich Text Documents into NVivo:

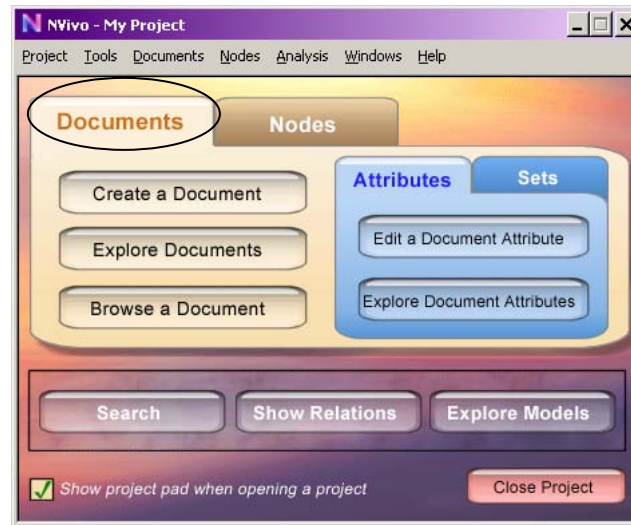
1. From the Project Pad, under the **Documents** tab (see Picture 3) select the *Create a Document* button ().
2. In the New Document Wizard: Creation dialog box, click on the radio button to *Locate* and import readable external file(s), click on *Next >*.
3. In the Select File To Read dialog box, use the *Look in:* pulldown menu to locate the file you would like to import.
4. Single click on the Rich Text Document you would like to import and click on *Open*.
5. In the New Document Wizard: Obtain Names dialog box, click on the radio button next to *None of the above*. and click on the *Next >* button.

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6. In the New Document Wizard: Name dialog box, type in a name for your document on the *Name*: text box and type in a description of your document in the *Description*: text box.
7. Click on the *Finish* button.


Picture 3: Project Pad – Documents Tab




Browsing Documents

You can easily view and edit documents that you have imported into NVivo by using the **Browse** feature.

To view and edit documents:

1. From the **Project Pad**, under the **Documents** tab select the *Browse a Document* button ().
2. In the Choose Document dialog box, use the *Look in:* pulldown menu to locate the file you would like to browse.
3. Single click on your file and click the *OK* button.
4. Your document will appear in the **Document Browser** window.
5. You can simply view your document or edit your document in the **Document Browser**. (Caution: changes that you make to your document in the **Document Browser** will automatically be saved and cannot be reversed.)

Helpful tip: You can also browse documents from the Document Explorer window by selecting the document you would like to view and clicking on the *Browse* button (.

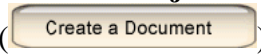
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Creating New Documents

You can make new documents in NVivo by using the **Create New Document** feature.

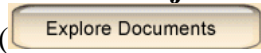


To create a new document:

1. From the **Project Pad**, under the **Documents** tab select the *Create a Document* button ()
2. Select the radio button to *Make a new blank document*. If this new document is a memo, check the box next to *Create document as a memo* (this will categorize the document as a memo).
3. In the *Name:* text field, enter a name for your new document.
4. In the *Description:* text field, enter a description for your new document.
5. Click on the *Finish* button.
6. The **Document Browser** will appear with your new document. Enter your text into the new document.

Organizing Documents


You can organize your documents into sets so that documents that are of the same type can be easily identified. In addition, you can assign attributes to each document to help organize and sort your documents.

Organizing your documents into sets:

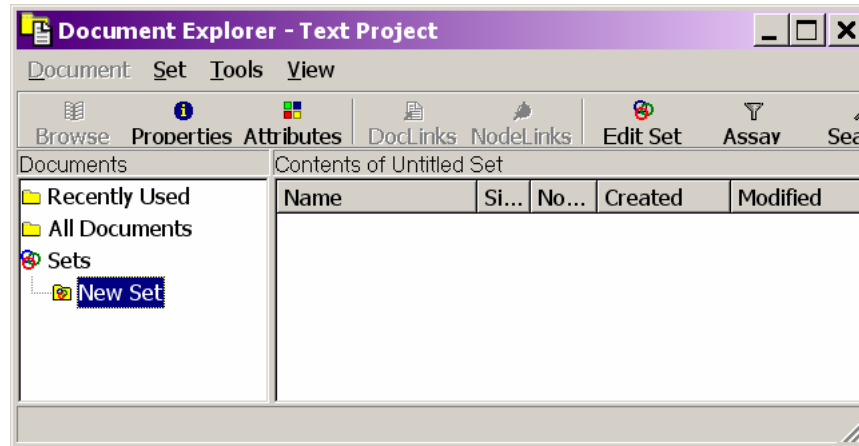
1. From the **Project Pad**, under the **Documents** tab select the *Explore Documents* button ()
2. The **Document Explorer** (see Picture 4) will appear.
3. Click on the **Tools** menu and select **Create Set**.
4. A new set will appear under the *Sets* button ( Sets).
5. To give your new set a name and description, click on the **Set** menu and select **Inspect/Change Set's Properties**.
6. In the *Title:* text area, enter a name for your new set.
7. In the *Description:* text area, enter a description for your new set.
8. Click the *OK* button.
9. Now we will insert documents into our new set. Click on the *All Documents* button ( All Documents).
10. All of the documents in your project will be listed in the right hand side of the **Document Explorer**.

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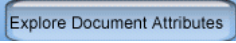
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11. Drag and drop each of the documents that are appropriate for your new set into the **Folder** button ( New Set , in this case my set is called “New Set”) for your new set.
12. To ensure that your documents have safely arrived, click on the **Folder** icon for your new set. All of the documents that are now members of that set will appear on the right hand side of the window.

Picture 4: Document Explorer

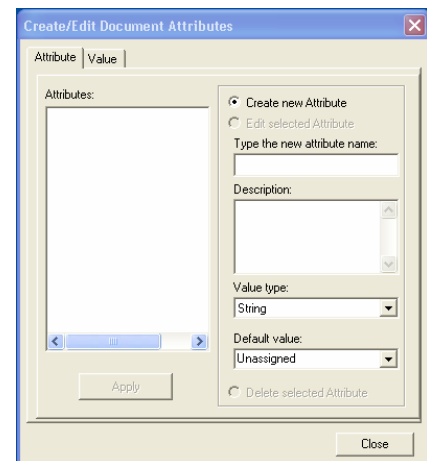


To assign attributes to a document:

1. From the **Project Pad**, under the **Documents** tab select the *Explore Document Attributes* button ().
2. The **Document Attribute Explorer** (see Picture 6) will appear. All of your documents will be listed in the first column. As you add attributes, new columns will appear for each attribute.

Picture 5: Create/Edit Document Attribute

3. Click on the **Attribute** menu and select **New Attribute....**
4. In the *Create/Edit Document Attribute* window(see Picture 5), type a name for your attribute in the text area under *Type the new attribute name:*.
5. To give your new attribute a description, type a description for your new attribute in the text box under *Description:*.
6. Choose the appropriate type of attribute in the pulldown menu under *Value type:*. (String should be used for all text based attributes, Boolean should be used only for true/false attributes, and number can be used for all numerical attributes.)

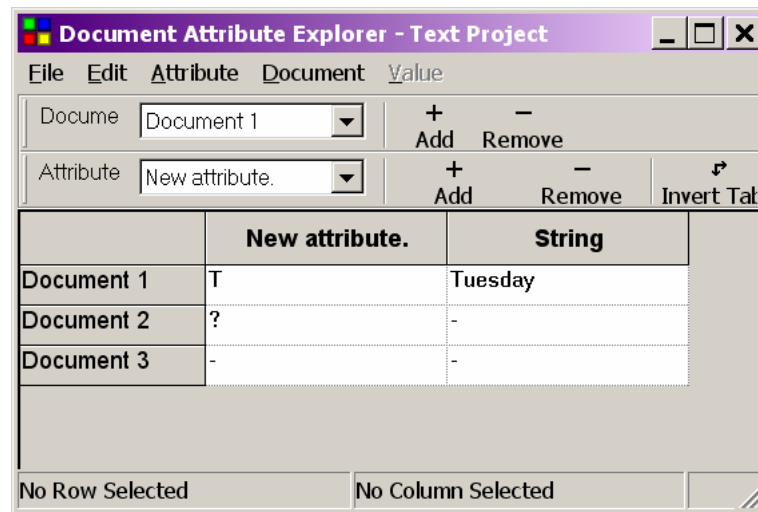


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7. Once all of your values are set, click on the *Apply* button. Your new attribute will appear on the left hand side of the window.
8. To assign values to your new attribute, highlight your new attribute and click on the **Value** tab. If you chose Boolean value type, default values of True and False will already be created for you. For numerical and string value types, you will need to create values for your attribute. To do so, select the radio button next to *Create new value* and type the value into the text area under *Create new value*.
9. Once you have given your value a name, click on the *Apply* button. Your new attribute value will appear in the left hand side of the screen. Continue this process until all new values have been added for your attribute.
10. When you have completed adding attributes and values, click the *Close* button.
11. This will return you to the **Document Explorer**, where your new attributes will appear as columns.
12. To assign attributes to your documents, right click on each of the cells and select the appropriate value for each document and attribute pair.

Picture 6: Document Attribute Explorer



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Understanding Nodes

Nodes are the equivalent of placing sticky notes on a document to remind you that a particular passage is important. In NVivo, you use nodes to code your documents. Unlike sticky notes, the nodes you create in NVivo are searchable and easily merged, organized, deleted, or changed. You can either let your nodes emerge as you code or you can establish your nodes before coding. Either way, you can always change your nodes later.

Types of Nodes

Free nodes: Ideas that haven't been linked to other ideas.

Trees nodes: A hierarchical structure for categories (confidence) and subcategories (high, low) of ideas.

Case nodes: Allow you to group cases (teachers) and then to have case nodes for specific teachers (Jack, Jane, Jill).

Coding Data by Creating New Free Nodes

To attach a new node to text:

1. From the **Project Pad**, under the **Documents** tab select the *Browse a Document* button.
2. Using the *Look in:* pulldown menu, choose the document you would like to code. Click the *OK* button.
3. Highlight the text in your document that you would like to code.
4. On the bottom of the screen, you will see the **Coding Bar** (See Picture 7). In the pulldown menu you can type in a new node. Once you have entered the appropriate node, click on the *Code* button next to the pulldown arrow.
5. The highlighted text will now be coded.
6. To ensure your text has been coded, you can view **Coding Stripes** for your document. In the **View** menu, select **Coding Stripes**. This will open a new frame in your **Document Browser** that shows which nodes are associated with specific pieces of text.
7. Your new node will be categorized as a free node until you organize it into a tree or case node.

Picture 7: Coding Bar



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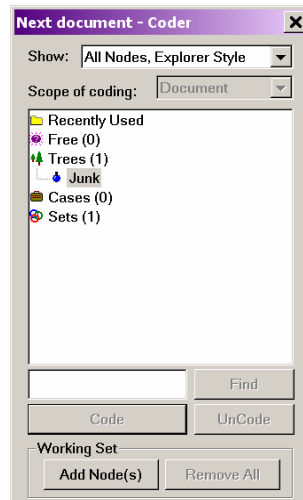
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Coding Data by Using Established Nodes

To attach a previously created node to text:

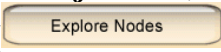
1. From the **Project Pad**, under the **Documents** tab select the *Browse a Document* button.
2. Using the *Look in:* pulldown menu, choose the document you would like to code. Click the *OK* button.
3. In the **Coding Bar**, click on the *Coder* button. This will open the **Coder Window** (See Picture 8). The coder window will outline all of the nodes you have created.
4. Highlight the text in your document that you would like to code.
5. Using the **Coder Window**, highlight the node you would like to attach to the highlighted text and click on the *Code* button.
6. The highlighted text will now be coded.
7. To ensure your text has been coded, you can view **Coding Stripes** for your document. In the **View** menu, select **Coding Stripes**. This will open a new frame in your **Document Browser** that shows which nodes are associated with specific pieces of text.

Picture 8: Coder Window



Creating Nodes in the Node Explorer

To create new nodes:

1. From the **Project Pad**, under the **Nodes** tab (see Picture 9) select the *Explore Nodes* button ()
2. In the **Node Explorer** (see Picture 10), right click on the type of node you would like to create (free, tree, or case). From the menu that appears, click on the **Create (Free, Tree,**

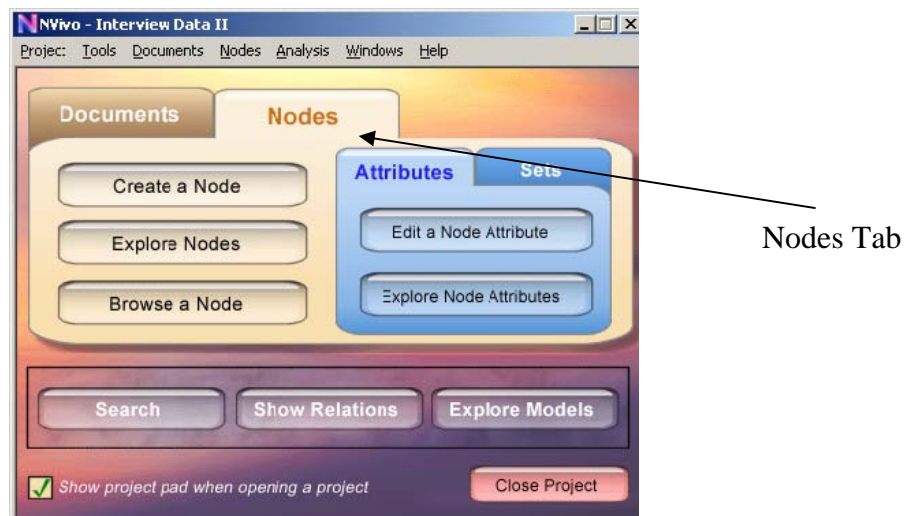
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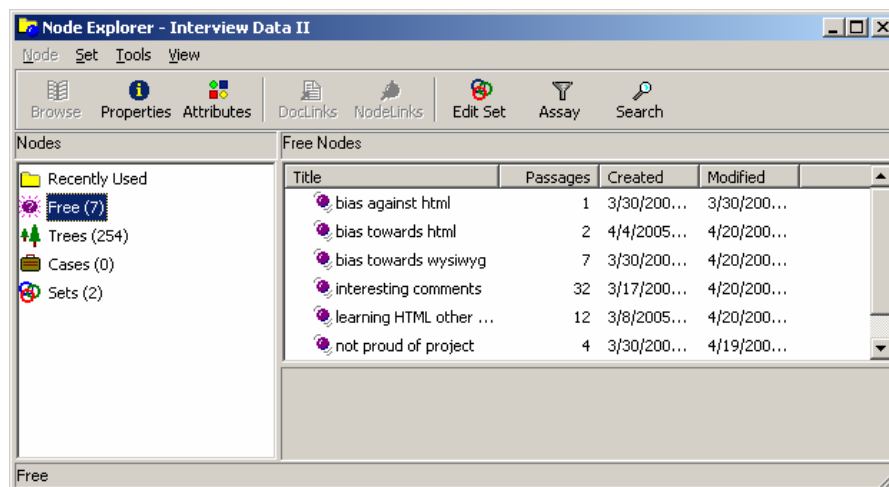
or Case Type) Node option. This will create a new node under the appropriate node type.

3. To rename the node, highlight the new node and click on the **Node** menu. From this menu, click on the option to **Inspect/Change Node's Properties**.
4. In the **Properties** window, in the text area under *Title*: insert a name for your new node.
5. In the text box under *Description*: insert a description for your new node.
6. After entering all of the information for your new node, click on the *OK* button.

Picture 9: Project Pad – Node Tab



Picture 10: Node Explorer





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Managing Nodes



To organizing free nodes into tree nodes:

1. From the **Project Pad**, under the **Nodes** tab, select the *Explore Nodes* button.
2. In the **Node Explorer**, expand the tree nodes you have created by double clicking on the tree node icon ( Trees (254)).
3. Single click on the Free node icon ( Free (7)), so that your free nodes are listed on the right hand side of the window.
4. Select the free node you would like to reorganize and drag and drop (click and hold your click on the node while also using the mouse to move the node across the screen until it is on top of the appropriate tree node) it onto the tree node where you would like it to be coded.
5. Your free node will now be reorganized into the tree hierarchy.

Browsing All Text Coded by a Node

To browse text coded by a node:

1. From the **Project Pad**, under the **Nodes** tab, select the *Explore Nodes* button.
2. In the **Node Explorer**, select the node you want to see coded text for and click on the

 **Browse** button (). This will open the **Node Browser** window that will list all text coded at the selected node.

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Finding Relationships and Patterns

Searching Your Data


There are three primary searches available in NVivo, single item, Boolean, and proximity.

Single item searches: allow you to find all instances of one item (text, node, or attribute value) in your documents.

Boolean searches: allow you to search for multiple items at the same time using logic operators (and, or, not, less) that define how those items should be searched.

Proximity searches: allow you to find places where two items (text patterns, attribute values, nodes) appear near each other in the text.

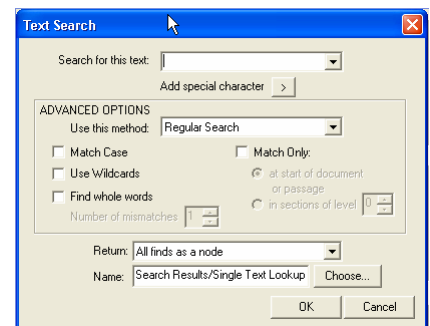
To search your data:

1. From the **Project Pad**, click on the *Search* button (). This will open the **Search Tool** window (see Picture 16).
2. In the *Find:* portion of the **Search Tool** window, click on the type of search you would like to perform (single item: *Text...*, *Node...*, *Attribute Value...*; or, multiple items: *Boolean*, *Proximity*).
3. After selecting the appropriate single item or multiple item search, a new window will appear:

For single item text searches:

- a) Type in the text you would like to search for in the text area next to *Search for this text:*.
- b) In the text area next to *Name:*, the default is for your search results to appear as a new node under “/Search Results/Single Text Lookup”. Highlight the words “*Single Text Lookup*” and replace those words with a new name for your node that will represent the search you are completing. Click on the *OK* button.
- c) This will return you to the **Search Tool** window, click on the *Run Search* button.
- d) The results of your search will now be available as a new node (named as you specified in step b) in the node tree “*Search Results*”.

Picture 11: Text Search



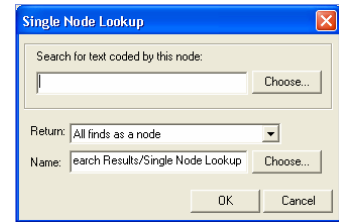
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For single item node searches:

- Click on the *Choose...* button.
- Using the *Look in:* pulldown menu, find the node you would like to search for.
- In the text area next to *Name:*, the default is for your search results to appear as a new node under “/Search Results/Single Node Lookup”. Highlight the words “Single Node Lookup” and replace those words with a new name for your node that will represent the search you are completing. Click on the *OK* button.
- This will return you to the **Search Tool** window, click on the *Run Search* button.
- The results of your search will now be available as a new node (named as you specified in step c) in the node tree “Search Results”.

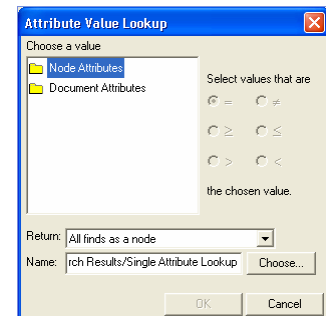
Picture 12: Node Search



For single item attribute value searches:

- Use the *Choose a value* window to find the attribute value you would like to search for.
- Choose the mathematical operator (equals to, does not equal to, greater than, less than, etc.) that best represents what you are searching for.
- In the text area next to *Name:*, by default your search results will appear as a new node under “/Search Results/Single Attribute Lookup”. Highlight the words “Single Attribute Lookup” and replace those words with a new name for your node that will represent the search you are completing. Click on the *OK* button.
- This will return you to the **Search Tool** window, click on the *Run Search* button.
- The results of your search will now be available as a new node (named as you specified in step c) in the node tree “Search Results”.

Picture 13: Attribute Search



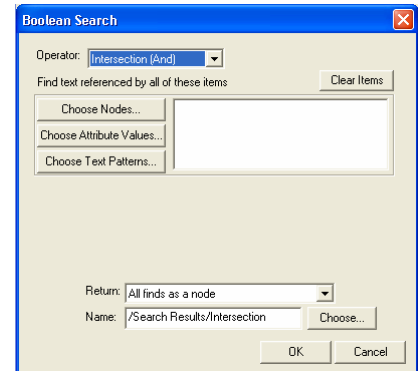
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For multiple item Boolean searches:

- Select the logic operator that best represents the type of search you are interested in completing from the *Operator*: pulldown menu.
- Use the *Choose Nodes...*, *Choose Attribute Values...*, and *Choose Text Patterns* buttons to select the items you would like to use in your search.
- In the text area next to *Name*:, the default is for your search results to appear as a new node under “/Search Results/Name of Logic Operator”. Highlight the “Name of Logic Operator” portion of that field and replace the name of your logic operator with a new name for your node that will represent the search you are completing. Click on the *OK* button.
- This will return you to the **Search Tool** window, click on the *Run Search* button.
- The results of your search will now be available as a new node (named as you specified in step c) in the node tree “*Search Results*”.

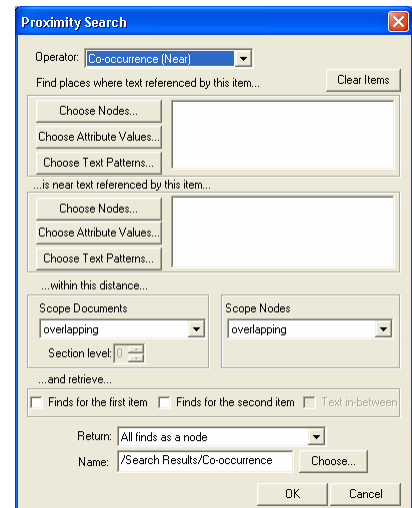
Picture 14: Boolean Search



For multiple item proximity searches:

- Select the logic operator that best represents the type of search you are interested in completing from the *Operator*: pulldown menu.
- Use the *Choose Nodes...*, *Choose Attribute Values...*, and *Choose Text Patterns* buttons in the *Find places where text is referenced by this item...* area to select your first item.
- Use the *Choose Nodes...*, *Choose Attribute Values...*, and *Choose Text Patterns* buttons in the *...is near text referenced by this item* area to select your second item.
- Using the *...within this distance...* area choose the distance you want these two items to be near each other.
- In the text area next to *Name*:, the default is for your search results to appear as a new node under “/Search Results/Name of Logic Operator”. Highlight the “Name of Logic Operator” portion of that field and replace the name of your logic

Picture 15: Proximity Search



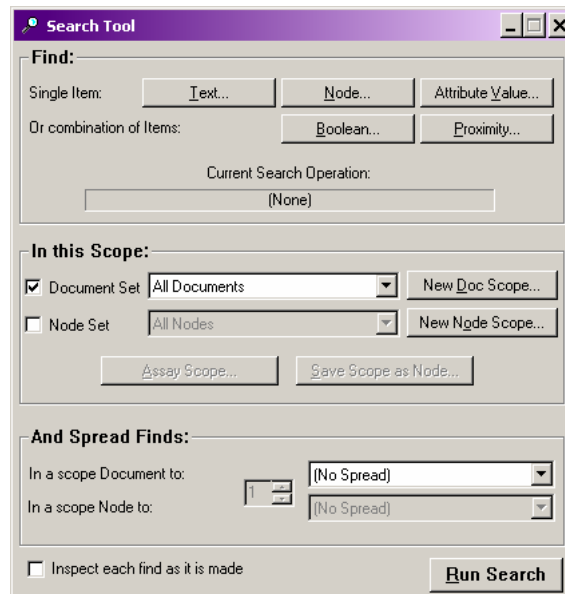
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operator with a new name for your node that will represent the search you are completing. Click on the *OK* button.

- f) This will return you to the **Search Tool** window, click on the *Run Search* button.
- g) The results of your search will now be available as a new node (named as you specified in step e) in the node tree “*Search Results*”

Picture 16: Search Tool



Identifying Relationships in Your Data Using the Show and Assay Tool

The show and assay tools are used to help you identify patterns in your data. The show tool will allow you to quickly browse through items coded at nodes, documents, attributes, attribute values, and sets (the bulleted list below describes each of the items you can display). The assay tool will create a table that identifies if a document has been coded by a particular node, set, or value.

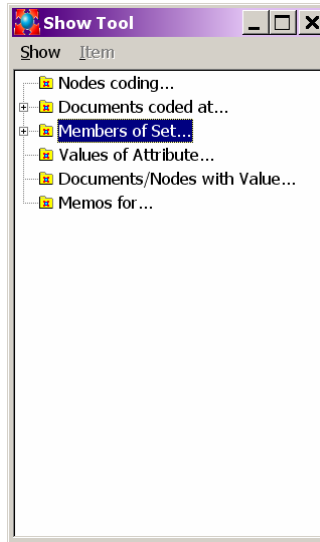
To open the show tool, go to the **Project Pad** and select the *Show Relations* button

(). This will open the **Show Tool** window (see Picture 17).

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Picture 17: Show Tool



Using the **Show** menu in the **Show Tool**, you can display:

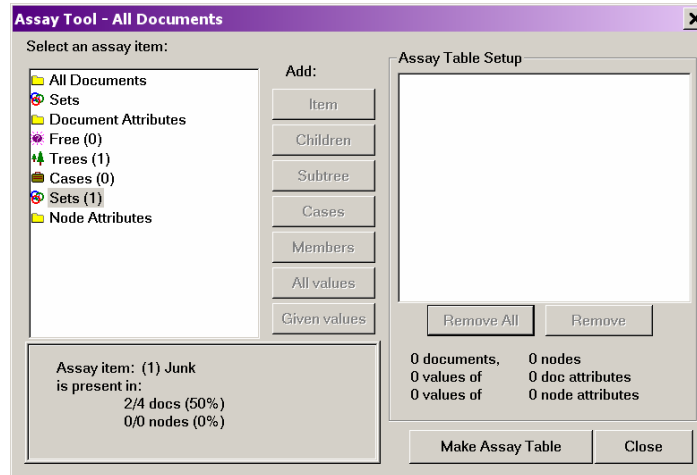
- All of the nodes within a document (**Nodes coding document...**)
- All of the documents that have been coded by a particular node (**Documents coded at node...**)
- Members of a document or node set (**Members of set...**)
- Values associated with an attribute (**Values of Attribute...**)
- Documents and nodes that have been assigned specific values (Docs/Nodes with value...)
- Memos that are attached to specific documents and nodes (**Memos for...**)

To open the **Assay Tool** from the **Document Explorer** or **Node Explorer**, click on the **Assay** button (). This will open the **Assay Tool** window (see Picture 18).

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Picture 18: Assay Tool



Using the assay tool, you can create a table that shows if documents have been assigned nodes, values, and membership in sets. To do so:

1. Select the items you are interested in exploring from the left pane and add them to your assay table by clicking on the appropriate button under *Add*: (the appropriate button will highlight after you select each item). You can move as many or as few items to the assay table as you would like.
2. Once you have selected all of your objects to be included in your assay table, click on the *Make Assay Table* button.
3. A table will appear that lists the selected documents and memos in the first column and all other items in individual columns to the right. If a 1 appears in a cell, it means that the document associated with that particular row had been coded or assigned the value at the top of the column.

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Creating Reports

In NVivo, you can create reports about documents and reports about nodes. The document reports list nodes within the document, whereas node reports list where a node appears across documents.

To create a Node Coding Report:

1. From the **Project Pad**, click on the **Explore Documents** button.
2. Highlight the folder containing documents for which you would like a node report completed (I generally use the *All Documents* folder).
3. In the **Set** menu, select **Report on Coding from a Node...**
4. Use the *Choose* button to select the node you are interested in and click on the *OK* button.
5. Your Node Coding Report will appear in a new window.

To create a Document Coding Report:

1. From the **Project Pad**, click on the *Explore Documents* button.
2. Browse through your documents and highlight the document for which you would like a document coding report completed.
3. From the **Document** menu, select **Make Coding Report**.
4. Click on the *Choose...* button to find the nodes you would like included in your report and click the *OK* button.
5. Your Document Coding Report will appear in a new window.

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Project Management

Saving Your Project

As with all programs, it is important to save your work at regular intervals to prevent loss of data.

To save your project:

1. From the **Project Pad**, under the **Project Menu**, select **Save Project**. The shortcut for saving your project is to hold down the *Ctrl* key (windows) and the *S* key simultaneously.

Backing Up and Restoring Your Project

NVivo has a utility built into it that allows you to easily backup your data and also restore your data from the last backup. Backups must be completed separately from saving.

To backup your project:

1. From the **Opening Screen for NVivo**, under the **Project Menu**, select **Backup Project**.
2. In the *Project Name:* pulldown list, select the project you would like to backup. If your project does not appear in the pulldown list, click on the *Choose...* button and choose the project folder you would like to backup.
3. Once you have found the correct project, click on the *Backup...* button.
4. Use the *Save in:* pulldown menu to select the location for your backup file.
5. In the *File name:* text box, type in a name for your backup file and click on the *Save* button.

To restore your project:

1. From the **Opening Screen for NVivo**, under the **Project Menu**, select **Restore Project**.
2. Click on the *Locate...* button to find the backup file for your project.
3. Click on the *Choose...* button to select a folder for NVivo to place your restored files.
4. In the *Project folder name:* text area, type in a name for your restored project (if you have selected the same location as your original project, the folder must be uniquely named.)
5. If you would like the project to open in NVivo as soon as it is restored, then check the box next to *Open project once restored*.
6. Click on the *OK* button. If it did not open right away, you should be able to open your project from the **Opening Screen for NVivo**.