

The impossible just got possible



# NVivo 8

## Getting Started

This guide will help you to get up and running with NVivo. It provides information about installing NVivo 8 and introduces the basic steps to get you started, including tips for approaching your research project and an introduction to the main features.



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## Introducing NVivo

Welcome to **NVivo**. This guide will help you to get up and running with **NVivo**. It provides information about installing **NVivo 8** and introduces the basic steps to get you started, including tips for approaching your research project and an introduction to the main features. For detailed information about using **NVivo**, refer to the following resources:

Resource	Description
<b>NVivo</b> Help	<p>On the <b>Help</b> menu, click <b>NVivo Help</b> to access comprehensive information about working with <b>NVivo</b>. The help is organized in two parts:</p> <ul style="list-style-type: none"> <li>• <b>Using the Software</b> contains step-by-step instructions for working with <b>NVivo</b>.</li> <li>• <b>Working With Your Data</b> provides concepts and strategies that help you get the most out of the software.</li> </ul> <p>You can choose to access offline help that is installed with <b>NVivo</b> or you can get the most up-to-date help via the web. If you are connected to the Internet, 'online' help will automatically be displayed—if you prefer to work with 'offline' help, change the setting in <b>NVivo's</b> Application Options (Tools&gt;Options).</p>
<b>NVivo</b> Tutorials	<p><b>NVivo</b> tutorials can be accessed from the <b>Help</b> menu in your software.</p> <p>Some help topics also include mini 'show me' movies that provide a quick demonstration of the task at hand.</p> <div style="background-color: #e6f2ff; padding: 5px;"> <p><b>Note:</b> To run the tutorials and mini 'show me' movies you will need Adobe Flash Player. If you do not have it installed, you will be prompted to download the player from the Adobe website: <a href="http://www.adobe.com">www.adobe.com</a></p> </div>
QSR Website	<p>The QSR website (<a href="http://www.qsrinternational.com">www.qsrinternational.com</a>) provides an extensive range of resources to assist <b>NVivo</b> users including:</p> <ul style="list-style-type: none"> <li>• Frequently asked questions</li> <li>• Materials to help you get started including tutorials</li> <li>• Resource articles, including a list of 'what's new in NVivo 8'</li> <li>• Access to the QSR support team</li> <li>• Access to the QSR forum (<a href="http://forums.qsrinternational.com">http://forums.qsrinternational.com</a>)</li> <li>• Information about training workshops in your area</li> </ul> <p>To locate the website resources you need, search the 'knowledgebase' in the Support section.</p>

## Installation

Installing **NVivo** is a simple process that involves moving through a series of screens. Before installing, make sure that your computer meets the hardware and software requirements described below.

It is also a good idea to have your license key nearby. You can find this on your **NVivo** CD sleeve, or—if you downloaded the product—in the download email communication received from QSR.

### Hardware and Software Requirements

You need the following components to install and run **NVivo**:

Component	Minimum	Recommended
Processor	1.2GHz Pentium III-compatible processor	1.6GHz Pentium 4-compatible processor or faster
Memory	512 MB RAM	1GB RAM or more
Display	1024 x 768 screen resolution	1280 x 1024 screen resolution or higher
Operating System	Microsoft Windows 2000 Professional Service Pack 4	Microsoft Windows XP Service Pack 2 or later, including Microsoft Windows Vista Service Pack 1
Hard Disk	Approximately 1GB of available hard-disk space	Approximately 2GB of available hard-disk space
Other		Internet connection

If you intend to work with data in a language other than English, you must ensure that the language has been installed on your computer. Refer to the Microsoft Windows online help for more information.

## Installing NVivo

To install **NVivo**:

- 1 Insert the **NVivo** CD into your CD drive. If the install does not start automatically, double-click the setup.exe file.  
OR  
If you downloaded **NVivo** electronically, locate and double-click the NVivo8.exe file. The **InstallShield Wizard** is displayed. It lists the components that need to be installed before installing **NVivo**.
- 2 Click **OK** and follow the prompts to install the components.  
When the components are installed, the **QSR NVivo 8** window is displayed.
- 3 Click the **Next** button. The **License Agreement** is displayed.
- 4 Read the agreement and, if you agree, click the **I accept the terms in the license agreement** option.
- 5 Click the **Next** button. The **Registration** window is displayed.
- 6 Enter your **license key**. You can find this on your **NVivo** CD sleeve, or—if you downloaded the product—in the download email communication received from QSR.
- 7 Click the **Next** button. The **Setup Type** window is displayed.
- 8 Choose the **Complete** set up option—this is recommended for most users.
- 9 Click the **Change** button if you want to change the default location for the application.  
Software is commonly installed under **Program Files**. This location may differ under Vista.
- 10 Click the **Next** button. The **Select Program Folder** window is displayed.
- 11 By default, the install will create a program folder for all your **NVivo** icons. To put the items in another folder, enter a new folder name.
- 12 Click the **Next** button.  
The **Desktop Shortcuts** window is displayed.  
The selected items will appear as icons on your desktop—if you do not want these icons to appear, clear the check boxes.
- 13 Click the **Next** button. The **Language** window is displayed.
- 14 Select the user interface language you want to use—this language will be used for all menus and dialog boxes within **NVivo**.
- 15 Click the **Next** button. The **Ready to Install Program** window is displayed.
- 16 Check the settings in the **Current Settings** list. To change a setting, click the **Back** button. To continue the installation, click the **Install** button.

- 17 When the files have been copied, the **Installshield Wizard Completed** screen is displayed. By default, the **Show the readme file** option is selected. The readme file contains general information and updates about **NVivo**. If you do not want to view the file now, clear the check box.
- 18 Click the **Finish** button.  
To start **NVivo**, double-click the **QSR NVivo 8** icon on your desktop.

**Note:** If you are a system administrator installing and activating **NVivo 8** on multiple computers, you can perform a 'silent install' using MSI command line techniques. Refer to the NVivo 8 Network Administrator's Guide for more information. You can download this guide from the QSR website ([www.qsrinternational.com](http://www.qsrinternational.com)).

## Activating NVivo

After installing **NVivo**, you have a limited amount of time before you are required to 'activate' the product. Product activation is a simple and secure process that ensures only valid licenses are used to operate the software.

You can activate your license via the Internet or by contacting QSR.

### Activating via the Internet

If you are connected to the Internet, you can activate your license online:

- 1 Ensure that you are connected to the Internet.
- 2 On the **Help** menu, click the **Activate License** option (or **Activate Now** on the activation reminder).  
The **Activate** screen is displayed.
- 3 Click the **Activate via Internet** option.
- 4 Enter your details. Those marked with an asterisk (\*) must be provided.
- 5 Click **Activate** to complete your product activation.

### Contacting QSR to Activate

If you do not have an Internet connection, you can send an activation request to QSR by email, mail, fax or phone. Then, enter the activation key provided by QSR to activate your license.

To send an activation request by email, mail, fax or phone:

- 1 On the **Help** menu, click the **Activate License** option (or select **Activate Now** on the activation reminder).  
The **Activate** screen is displayed.

- 2 Click **Activate via Email, Mail/Fax** or **Phone**. Note: if you only access your email using an Internet browser (web mail), you cannot activate **NVivo** by email.
- 3 Enter your details. Those marked with an asterisk (\*) must be provided.
- 4 Click the **Generate** button to obtain an **Installation Key**. (This must be provided to QSR along with your details).
- 5 If you are activating by email, click the **Send** button. **NVivo** will generate an activation request email using your default mail client. Send this email to QSR.  
OR  
If you are activating by mail, fax or phone, click the **Print** button to print the **NVivo Activation Request** form. Contact QSR using the details provided on the form.

To enter the Activation Key provided by QSR:

- 1 On the **Help** menu, click **Activate License**.  
The **Activate** screen is displayed.
- 2 Click **Activate via Email, Mail/Fax** or **Phone**.
- 3 In the **Activation Key** field, enter the **Activation Key** provided by QSR.
- 4 Click the **Activate** button.

## Deactivating NVivo

You may want to deactivate your **NVivo** license on a particular computer. For example, if you get a new computer, you should deactivate the **NVivo** license on your old computer, before installing and activating **NVivo** on your new computer. Refer to the help for instructions on how to deactivate **NVivo**.

## Removing NVivo

The procedure for removing **NVivo** software varies depending on whether you are running Windows 2000, Windows XP or Windows Vista. In this guide, we provide the steps for removing **NVivo** from Windows Vista. If you are running Windows 2000 or XP, refer to the Microsoft Windows online help for instructions on how to remove an installed program.

To remove **NVivo** software installed on Windows Vista:

- 1 On your Windows **Start** menu, click the **Control Panel** option.  
The **Control Panel** is displayed.
- 2 Click the **Uninstall a program** option.
- 3 Select **QSR NVivo 8** from the list of currently installed programs.
- 4 Click the **Uninstall** button.  
You are prompted to confirm the removal of **QSR NVivo 8**.
- 5 Click **Yes**.  
The **NVivo** software is removed from your computer.

**Note:** **NVivo** relies on a number of other components to run, and if they are not already present when you install, **NVivo** will install them for you. However, when **NVivo** is uninstalled, these components remain on your computer. These components can be removed individually using the **Uninstall a program** function which can be accessed from your computer Control Panel. You should only uninstall them if you are certain that they are not utilized by other programs on your computer and you have no future need for them. Components to be removed in the following order are:

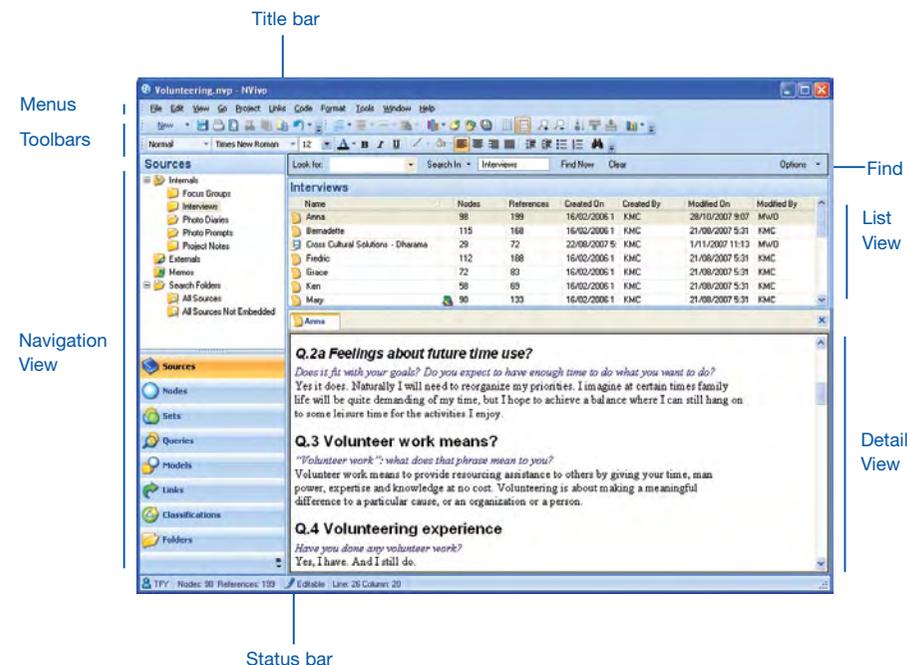
- Crystal Reports for .NET Framework 2.0
- Microsoft SQL Server 2005
- Microsoft .NET Framework 2.0
- Quick Time Player 7
- Windows Media Player 9 (for Windows 2000) or Windows Media Player 11 (for Windows XP and Vista)

## The NVivo Workspace

The **NVivo** workspace provides easy access to all elements of your research project.

You can customize the workspace to suit the way you want to work—refer to the help for detailed instructions.

The workspace is made up of the following components:



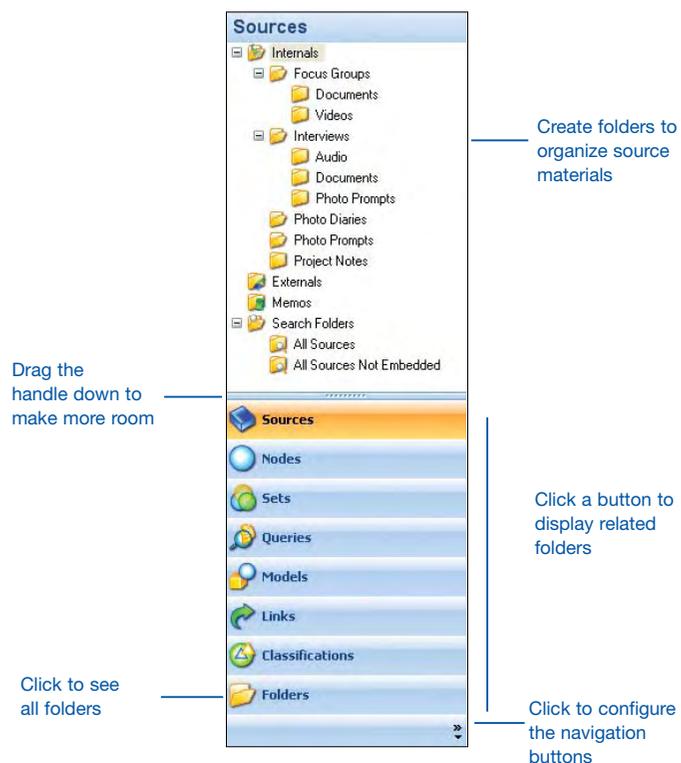
In **NVivo**, you work with your project items in three main views:

- **Navigation View**
- **List View**
- **Detail View**

The menus and toolbar buttons are 'context-sensitive' and change depending on the views you are working in.

## Navigation View

The **Navigation View** enables you to organize and access all your project items:



## The Components of a Project

The **Navigation View** provides access to all the components of a project, which may include:

Component	Description
<b>Sources</b>	<p>In <b>NVivo</b>, 'sources' are your research or project materials—anything from video recordings of research settings, to typed memos capturing your thoughts and ideas. Sources are categorized into the following types:</p> <ul style="list-style-type: none"> <li>• <b>Internals:</b> primary source materials such as field notes, audio interviews, video footage, photographs or whatever raw data is relevant to your project.</li> <li>• <b>Externals:</b> 'proxy' sources representing material that you cannot import into <b>NVivo</b> (newspaper articles, books, web pages and so on). In an external, you can record notes or summaries relating to the material. If the external represents a file on your computer, you can link to and open the file.</li> <li>• <b>Memos:</b> records of your thoughts and observations. If a memo is related to a particular project item you can create a 'memo link' to link the two together.</li> </ul>
<b>Nodes</b>	<p>You can 'code' sources to gather material by topic, for example, you could gather all the content relating to the concept of <i>community</i>. The container for references to this material is called a 'node'. <b>NVivo</b> provides the following types of nodes:</p> <ul style="list-style-type: none"> <li>• <b>Free Nodes:</b> 'stand-alone' nodes that have no clear logical connection with other nodes—they do not easily fit into a hierarchical structure.</li> <li>• <b>Tree Nodes:</b> nodes that are catalogued in a hierarchical structure, moving from a general category at the top (the parent node) to more specific categories (child nodes).</li> <li>• <b>Cases:</b> nodes used to gather material about people or sites that have attributes such as gender or age. Like tree nodes, cases can also be organized in hierarchies.</li> <li>• <b>Relationships:</b> nodes that describe the connection between two project items. For example, the relationship between two cases (Anne works with Bill) or between two nodes (Poverty impacts Health).</li> <li>• <b>Matrices:</b> a collection of nodes resulting from a matrix coding query. Although you can open and explore the nodes in a matrix, you cannot code at them.</li> </ul>

Component	Description
<b>Sets</b>	Sets provide a flexible way of grouping project items of different types. For example, you might create a set for the photographs and videos taken in a particular setting. You can customize the order of the items in a set to make a virtual 'album' or photo gallery.
<b>Queries</b>	Queries enable you to question your data, find patterns and pursue ideas. You can save queries, re-run them through new data and track the evolution of results.
<b>Models</b>	Models can illustrate initial ideas about your project or identify emerging patterns and connections. Make a 'static' model to represent your project at a specific point in time. Make a 'dynamic' model to represent your project in real time.
<b>Links</b>	<p>NVivo provides the following ways to link your data:</p> <ul style="list-style-type: none"> <li>• <b>Memo Links:</b> use 'memo links' to attach a memo to the source or node that is related to it.</li> <li>• <b>See Also Links:</b> use 'see also' links to place pointers between the content of sources, nodes, models or sets.</li> <li>• <b>Annotations:</b> like scribbled notes in a margin, annotations enable you to comment on selected content.</li> </ul>
<b>Classifications</b>	<p>NVivo enables you to classify:</p> <ul style="list-style-type: none"> <li>• <b>Cases</b> by setting up attributes such as gender, age and location.</li> <li>• <b>Relationships</b> by setting up relationship types (<i>loves, impacts, employs, is married to</i> and so on).</li> </ul>

## List View

When you select a folder in **Navigation View**, its contents are displayed in **List View**. In this view, you can add new items, open existing items and edit item properties. You can choose to display the contents of a folder as 'thumbnails'—an easy way to view and work with your videos and pictures.

This **List View** displays the contents of a folder:

Double-click an item to open it

Drag boundary to resize columns

Sort the list by clicking on the required column heading

Right-click on items to access a context-menu

Name	Nodes	References	Created On	Created By	Modified On	Modified By
Alma	98	199	16/02/2006 11:22 AM	KMC	23/10/2007 9:07 PM	MWO
Bernadette	115	168	16/02/2006 11:22 AM	KMC	21/08/2007 5:31 PM	KMC
Cross Cultural Solutions - Dihar	29	72	22/08/2007 5:21 PM	KMC	1/11/2007 11:13 AM	MWO
Fredric	112	188	16/02/2006 11:22 AM	KMC	21/08/2007 5:31 PM	KMC
Grace	72	83	16/02/2006 11:22 AM	KMC	21/08/2007 5:31 PM	KMC
Ken	58	69	16/02/2006 11:22 AM	KMC	21/08/2007 5:31 PM	KMC
May	90	133	16/02/2006 11:22 AM	KMC	9/01/2008 1:51 PM	SM
Nick	51	65	16/02/2006 11:22 AM	KMC	21/08/2007 5:31 PM	KMC
Peter	17	28	27/10/2007 3:05 PM	KMC		KMC
Phoebe	63	91	16/02/2006 11:22 AM	KMC	21/08/2007 5:31 PM	KMC
Sunil	50	63	16/02/2006 11:22 AM	KMC	21/08/2007 5:31 PM	KMC

## Detail View

When you open an item from **List View** it is displayed in **Detail View**. This is an example of a document opened in **Detail View**:

Open multiple items and move through them using the tabs

Apply styles and text formatting

Select content and code it at a node

Create 'see also' links

Add and view annotations

**Mary** | **Grace** | **Bernadette**

**Q.1a Feelings about current time use?**  
*How do you feel about your time use now? Does it fit with your goals? Are there other things you'd like to fit in?*  
 I really enjoy my time at Nazareth House because a few of my friends volunteer as well and we can catch up. **It's pretty flexible and friendly.** If I can't do my turn on the trolley, one of my friends can usually do it for me so it doesn't feel too much like a burden, just so long as we organize it efficiently it gets done. I haven't really thought about my goals but I think I would like to travel a bit more but my commitments make that a bit tricky.

**Q.2 Time use ten years on**  
*Please think ahead, to your life ten years from now. How does your use of time look then? (What will your goals be then? Will you be employed? What will you do when you are not*

Item	To Name	To Folder
1	May's Interview - Context	Memos

In **Detail View**, you can also:

- Open and explore a node to see the content gathered there—including text, pictures, audio and video.
- Display the results of a query.
- Undock the view from the workspace and work in a separate window.

Refer to the help for information about performing these tasks.

## Working with Toolbars

**NVivo** provides toolbars for fast access to the most common **NVivo** functions—you can hover over each button for a description of what it does.

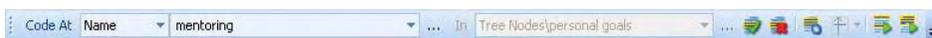
Use the **Main** toolbar to perform common tasks such as save, print, cut, copy, paste and undo:



Use the **Edit** toolbar to format text in sources and edit model content:



Use the **Coding** toolbar to code/uncode selected content:



Use the **View** toolbar to set display settings for project items:



Use the **Links** toolbar to work with 'see also' links, annotations and memos:



Use the **Media** toolbar to play, pause, forward, rewind and stop a video or audio file:



Use the **Grid** toolbar to work with matrices or the project casebook:



## Customizing Toolbars

You can change and move toolbars to suit the way you want to work:

Click the handle and drag a toolbar to a new location

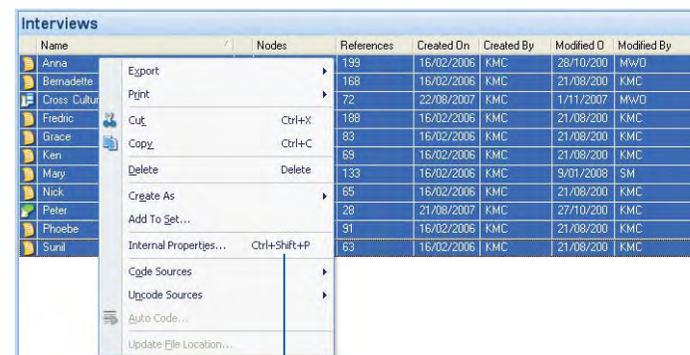


Click the drop-down arrow to add or remove toolbar buttons

## Working with Menus

The **Main** menu is at the top of the application window and provides access to all **NVivo** functions. The menus are 'context sensitive' and change depending on the items or views you are working with. For example, when you click in a document to begin coding, the **Code** menu becomes available.

Context (right-click) menus are also available throughout the application. For example, you can right-click on a selection of documents and add them to a set:

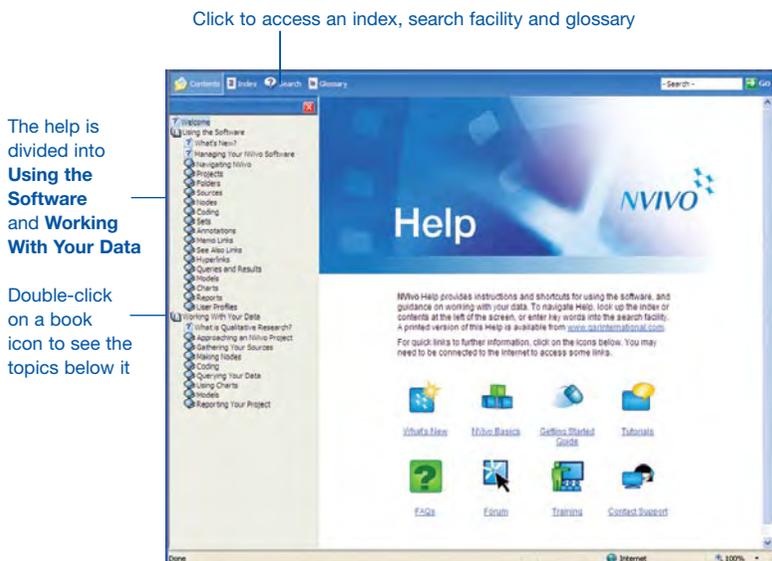


Right-click on selected documents and click the **Add to Set** option.

Shortcut keys are available for most common tasks. You can see these on the right of each menu option.

## Using Help

This guide provides instructions for getting started with an **NVivo** project. For more detailed information about using the software and working with your data, refer to the **NVivo** help. To access the help, click the **NVivo Help** option on the **Help** menu. If you are connected to the Internet, NVivo 8 Online Help is displayed—it provides the most up-to-date instructions and user resources.

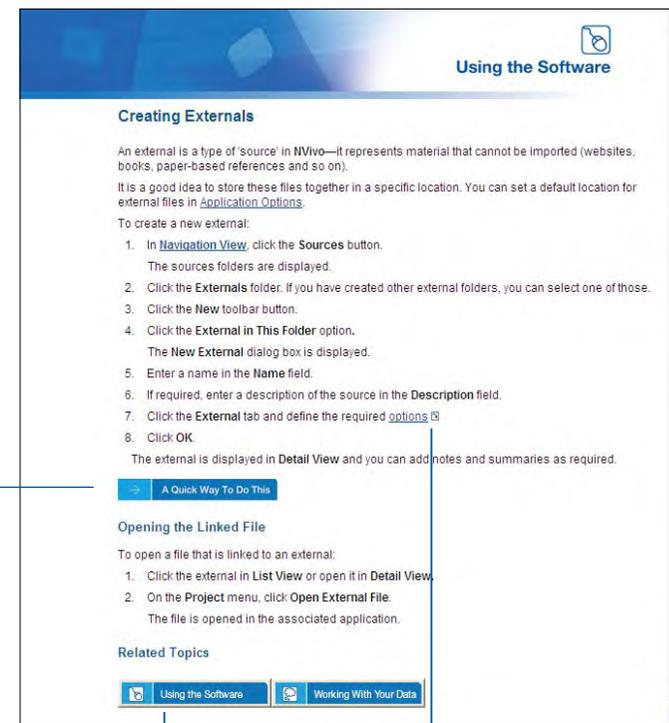


If you are not connected to the Internet, your local version of **NVivo** Help is displayed. If you would prefer to work with offline help all the time:

- 1 On the **Tools** menu, click **Options**.  
The **Application Options** dialog box is displayed.
- 2 Click the **Always use offline help** option.
- 3 Click **OK**.

## Help – Using the Software

The help topics under **Using the Software** contain step-by-step instructions and provide the fundamental information you need to work with the software:

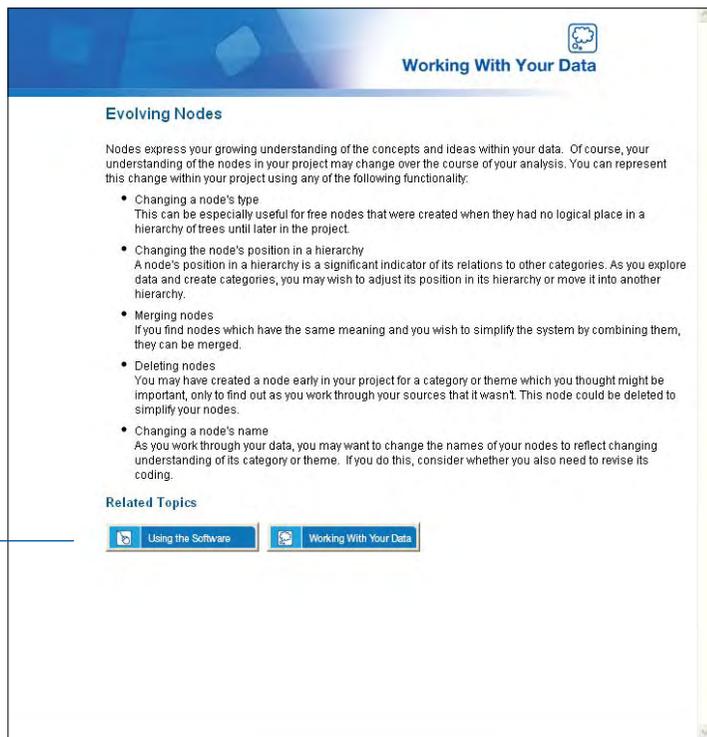


Click the buttons for related instructions or concepts

The arrow identifies drop-down text. Click the underlined text to show or hide detailed information

## Help – Working With Your Data

The help topics under **Working With Your Data** provide concepts, tips and strategies that help you to handle your data—everything from ‘Where to Begin’ to ‘How to Assess My Project’.



Click a button for related instructions or concepts

## Approaching a Research Project

**NVivo** is designed to support you at every stage in your research project—from the earliest idea to the formulation of conclusions and recommendations. Before you start, you may find it helpful to consider the following:

### Prepare Your Data

- If you have structured documents—such as interviews where participants are all asked the same set of questions—format them using consistent paragraph styles to support auto coding. You can do the formatting in Microsoft Word before you import, or in **NVivo** after import.
- When working with audio, video or picture data, consider any editing requirements before import. For example, if you have hours of video footage, you may want to edit it down to a manageable size—you cannot do this editing in **NVivo**. If you have many large videos, you can choose to store them outside the project so that software performance is not compromised.
- Think about whether you will require transcripts for your audio and video sources. They can be imported in .doc, .rtf or .txt format or you can transcribe the media directly in **NVivo**. You can code directly in an audio/video or you can code the transcript.

### Prepare for Teamwork

- If you are working in a team, consider possible approaches. Team members can work on different data sources or bring unique perspectives to the same sources—either way, you can easily merge the contributions made by all collaborators.
- Each team member can work in their own project file or you can share a single project with other colleagues. Note that a project file can only be accessed by one person at a time.
- Where coding consistency is important, agree on a node structure early and have regular discussions about how the structure is evolving. Create this structure in a ‘master’ project and import it into the separate project files. Use the **Coding Comparison Query** to regularly check for consistency between coders.
- Give each team member a unique user profile—they are prompted to enter this when they first launch **NVivo**. This way you can track the updates and coding done by members of your team.

### Gather Your Early Ideas

- Make a project journal in **NVivo**. Use it to record your early goals, assumptions, theories and challenges. Keep track of your project as it evolves.
- Use your **NVivo** project as a central place to store all preliminary materials such as client briefs, literature notes, grant applications, participant release forms or thesis proposals.
- Create a model in **NVivo** to capture and visualize your theories or to aid your research design.
- If you have a research design, set up the sources, cases, and nodes to support it.

## NVivo Basics

Once you have determined how you will approach your research project, you are ready to get started. This guide will get you up and running with an **NVivo** project by taking you through the basic steps involved in:

- Creating a project
- Gathering your source materials
- Creating nodes
- Simple coding

Once you become familiar with these tasks, you can explore other features such as:

- Running queries to find patterns in the data
- Drawing models to visualize connections in the data
- Creating charts
- Running reports
- Exporting data

Detailed information about each of these features is provided in the **NVivo** help.

### Creating a Project

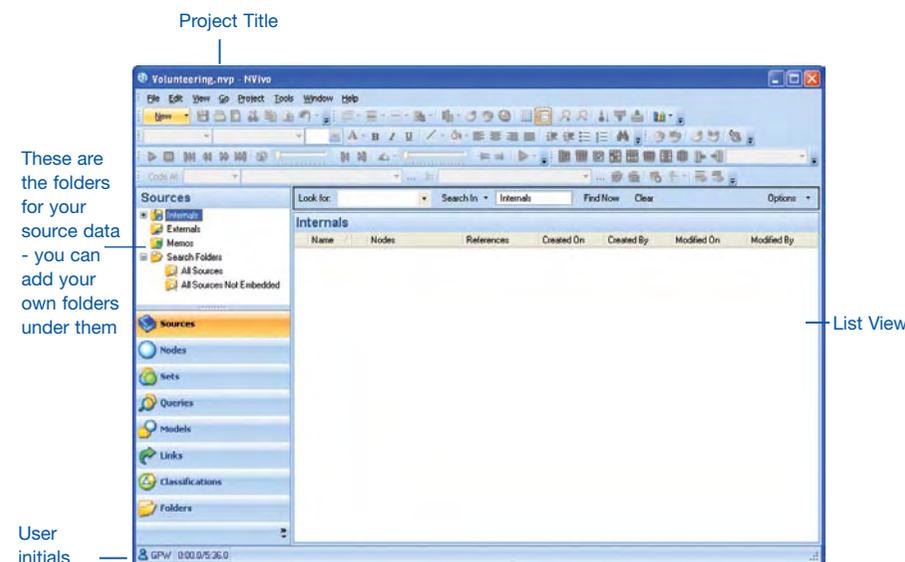
When you save a project it is stored on your computer as an **.nvp** file.

To create a new project:

- 1 Click the **QSR NVivo 8** icon on your desktop to open the application. On first launch, the **NVivo User** dialog box is displayed.
- 2 By default, your Windows user name is displayed in the **Name** field. You can update the name if required. If you are sharing this Windows login with another user, enter your own name.
- 3 In the **Initials** field, enter your initials. When working in a team, the initials will help you keep track of the updates made by team members. If multiple researchers will be using the current Windows login, you can prompt them for their user profile whenever they open **NVivo**. For more information refer to the help.
- 4 Click **OK**.
- 5 On the **Welcome** screen, click the **New Project** button. The **New Project** dialog box is displayed.
- 6 Enter a name for your project in the **Title** field.

**Note:** The project title is not the same as the project file name. Although the title is used as a default when you first save a project, subsequent changes to the title are not reflected in the file name.

- 7 If required, enter a description of your project in the **Description** field. For example, this might include information about the objectives of your research project.
- 8 To change the location of the project, click the **Browse** button.
- 9 Click **OK**. The **NVivo** window is displayed with the name of your project in the Title bar and your user initials in the Status bar:



### Upgrading Projects from Previous Versions

**NVivo 8** will allow you to open projects from **NVivo 7**, **NVivo 2**, **NVivo 1**, **N6 (NUD\*IST 6)**, **N5** or **N4**. To upgrade older projects, simply open them in this version of **NVivo**:

- 1 On the **File** menu, click **Open Project**. The **Open Project** dialog box is displayed.
- 2 From the **Files of type** drop-down list (at the bottom of the dialog box), select the type of project you want to open. You can open the following projects in **NVivo**:
  - **NVivo 7** including **NVivo 7 Student** (.nvp)
  - **NVivo 1** or **2** (.qda)
  - **N6**, **N5** or **N4** including **N6 Student** (.stp)
- 3 Using the **Look in** drop-down list, locate the drive and folder that contains the project you want to open.

- 4 Click the required project file.
- 5 Click the **Open** button. The **Convert Project** dialog box is displayed.
- 6 Click the **Browse** button.
- 7 Using the **Save in** drop-down list, click the destination folder for the newly created project.
- 8 In the **File name** field, enter a name for the converted project.
- 9 Click **Save**.
- 10 Set any required **Import Options**. Refer to the **NVivo** help for detailed information about these options.
- 11 If required, enter the relevant user name and password for the older project.
- 12 Click the **Convert** button.

## Gathering Your Source Materials

In **NVivo**, 'sources' is the collective term for your research materials—anything from handwritten diaries to video recordings of group discussions. After creating a project, you can gather your research data in the following ways:

- **Import Internals** - these are your *primary sources* that may include:
  - > **Documents** in text (.txt), rich text (.rtf), portable document format (.pdf) or Word (.doc) format. For example, interview transcripts, emails, literature reviews and so on. You can also create documents directly in **NVivo**, refer to the help for more information.
  - > **Video** recordings in .mpg, .mpeg, .mpe, .wmv, .avi, .mov, .qt or .mp4 format. This might include video recordings of interviews or research settings, media clips and so on.
  - > **Audio** recordings in .mp3, .wma or .wav format. This might include audio interviews, podcasts, music or whatever audio material is relevant to your research.
  - > **Pictures** that are in .bmp, .gif, .jpg, .jpeg, .tif or .tiff format. For example, you might have photos that are used to elicit responses from research participants or photos taken by the participants themselves.
- **Create Externals** for files that you cannot import—handwritten diaries, books, PowerPoint presentations and so on.
- **Create or Import Memos** to record your thoughts and observations. For example, you could create a *project journal* to capture information about the progress of your project.

## Importing Sources

You can import sources at any time and organize them into folders if required. Refer to the help for detailed information about working with folders.

To import your sources:

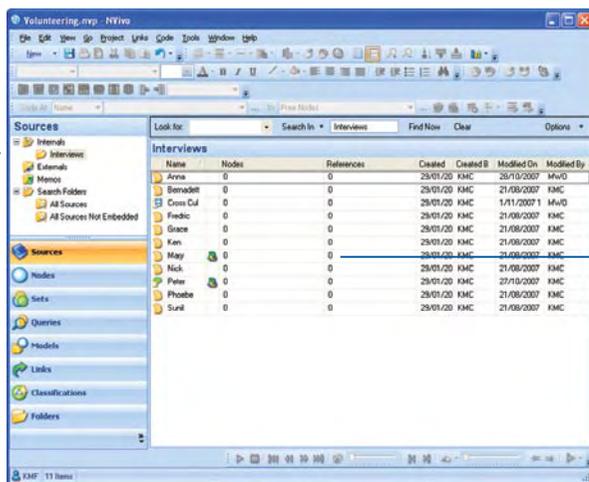
- 1 Click the **Internals** folder.
- 2 On the **Project** menu, click **Import Internals**. The **Import Internals** dialog box is displayed.
- 3 In the **Import from** field, click the **Browse** button.
- 4 Locate the files (documents, audio, video or pictures) you want to import. Hold down the CTRL key to select multiple files or the SHIFT key to select a range of files.
- 5 Click the **Open** button. The selected files are displayed in the **Import from** field.
- 6 Select the required **Options**:

Option	Description
Create descriptions	Click this option if you want <b>NVivo</b> to use the first paragraph of the imported document to create the document description. To see the description for a selected document, click <b>Document Properties</b> on the <b>Project</b> menu. This option does not apply to audio, video or pictures.
Code sources at new cases located under	Click this option to automatically create a case for each source. This is useful if your documents, audio, video or pictures are related to individual research participants—and you want to create a case for each participant. If you do not choose to create cases now, you can always do it later. Refer to the help for more information about working with cases.
Create as read-only	Click this option to import the source as read-only. This means you can code and add annotations or links to the source but you cannot edit the text.

- 7 Click **OK**.

The imported sources are displayed in **List View**:

You could add an *Interviews* folder and drag the sources into it

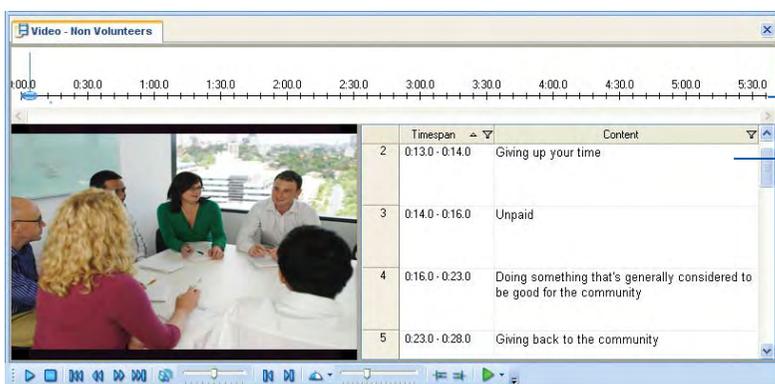


Imported sources in List View—double-click a source to open it

The node and reference counts are zero because no coding has been completed

### Creating a Transcript for Audio and Video Sources

When you import an audio or video and open it in **Detail View**, you will see that it contains an area for transcribing the media. You can code and annotate directly on the media (using the timeline) or you can work with text in the transcript or do a mixture of both.



Media timeline

You can create the transcript in NVivo or import it in .doc, .rtf or .txt format

You can move the Media toolbar to suit the way you work—use it to play, pause and rewind the media

To transcribe audio or video media within **NVivo**:

- 1 On the **Media** menu, click **Play Speed**, and then select your preferred play speed for transcribing.
- 2 On the **Media** menu, click **Play Mode**.
- 3 Click the **Transcribe** option.
- 4 On the **Media** toolbar, click the **Play** button.  
An entry is added to the transcript and you can enter the required text as the media is playing. You can also pause, rewind or skip sections of the media as you enter the text.
- 5 Press the **Stop** button when you have finished with an entry. The timespan of the entry is displayed in the **Timespan** field.
- 6 Press the **Play** button to create the next transcript entry.

You can also import a transcript or use other ways to create transcript entries—refer to the help for more information.

If you do not want to create transcript entries, you can hide the transcript—on the **View** menu, click **Transcript**, and then click **Hide**.

For more detailed information about working with audio and video sources, refer to the help.

### Creating a Log for Pictures

When you import a picture and open it in **Detail View**, you will see that it includes an area for entering descriptive text—this is called the 'picture log'. You can code and annotate directly on the picture or on the text in the picture log.



Using the picture log, you can describe the whole picture or a selected region

To create a single log entry for the entire picture, click in the **Content** field and enter the required text.

To add a log entry for a selected region of the picture:

- 1 On the picture, click and drag to select the required region.
- 2 On the **Format** menu, click the **Insert** option.
- 3 Click the **Row** option.  
A log entry is added for the selected region—the pixel coordinates are displayed in the **Region** field.
- 4 Enter the required text.

If you do not want to create log entries, you can hide the picture log—on the **View** menu, click **Log**.

For more detailed information about working with pictures, refer to the help.

### Creating Externals

You can create an 'external' to represent data that cannot be imported into **NVivo**. In the external you can enter summaries and observations. For example, this is a summary of a website:

You can open the web page from the external and enter notes and summaries as required—click **Project>Open External File**



NVivo can automatically create default headings—you can edit them to suit your requirements

Code the content of an external like any other document

To create an external:

- 1 Click the **Externals** folder.
- 2 On the **Main** toolbar, click the **New** button.
- 3 Click the **External in This Folder** option.  
The **New External** dialog box is displayed.
- 4 Enter a name and description for the external.
- 5 Click the **External** tab.
- 6 From the **Type** drop-down list, select an option that best describes the item:

Option	Description
Other	The item is not stored on your computer. For example, it might be a book or a diary in handwritten format. You can specify the physical location in the <b>Location description</b> field— <i>top shelf of bookcase</i> .
File link	The item is stored on your computer as an executable file. For example, an Excel spreadsheet or a PowerPoint presentation. If you choose this option, you can create a link to the file. In the <b>File Path</b> field, click the <b>Browse</b> button and locate the file.
Web link	The item is a web page. You can create a live link to a web page by providing the web address in the <b>URL Path</b> field.

- 7 If you want to create an external that contains pre-formatted headings:
  - a From the **Contents** drop-down list, select the option that best describes the external.
  - b From the **Unit** drop-down list, select the units the external should be divided into.  
These units will become the headings—for example, chapter 1, chapter 2 and so on.
  - c Enter a start and end range—for example, 1 to 20.
- 8 Click **OK**.

The external is created and you can begin entering your notes or summaries—refer to the help for more information.

## Creating Memos

Memos are imported or created in the same way as documents—except that they are stored in the **Memos** folder. A memo may be about your project as a whole or it could be ‘linked’ to a particular project item. For example, you could create a memo describing the context of an interview.

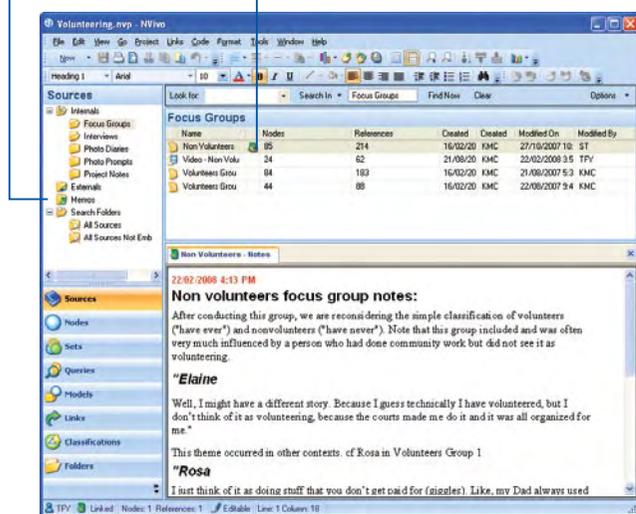
To create a linked memo while working in a source:

- 1 On the **Links** menu, click the **Memo Link** option.
- 2 Click the **Link to New Memo** option.  
The **New Memo** dialog box is displayed.
- 3 Enter a name and description.
- 4 Click **OK**.

The memo is opened in **Detail View** and you can add the required content:

The memo is stored in the **Memos** folder

The icon indicates that this document is linked to a memo



Enter and format the memo content as required

## Creating Tree Nodes

If you already have themes that you want to explore, you can begin creating nodes. If no ‘ready-made’ themes exist, you can jump straight into your sources and create nodes as themes emerge—refer to ‘Coding at a New Node’ later in this guide.

This guide describes how to create a simple tree node structure. For more details about working with other node types, refer to the help.

To create tree nodes:

- 1 In the **Navigation View**, click the **Nodes** button.
- 2 Click the **Tree Nodes** folder.
- 3 On the **Main** toolbar, click the **New** button.
- 4 Click the **Tree Node in this Folder** option.  
The **New Tree Node** dialog box is displayed.
- 5 Enter the node name. For example, *Images of Volunteers*.
- 6 If required, enter a description in the **Description** field.
- 7 Click **OK**.

The node is displayed in the **List View**:

The **Sources** and **References** are 0 because no source material has been coded at this node yet

Name	Sources	References	Created On	Created By	Modified On	Modified By
Image of Volunteers	0	0	22/01/2008 9:41 PM	GPW	22/01/2008 9:41 P	GPW

This new node is at the ‘root level’ of the tree node folder (it has no parent)

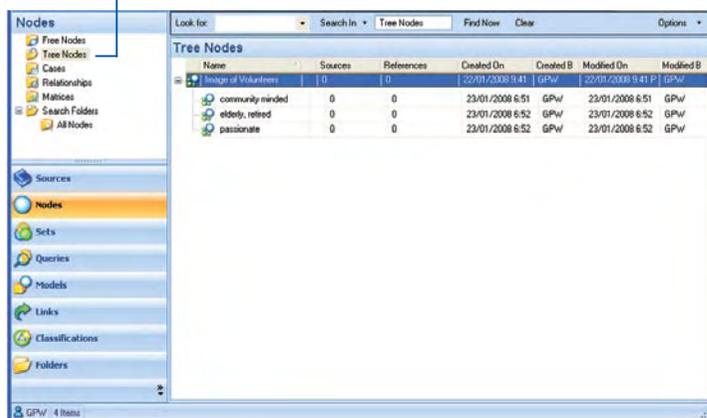
If required, you can add ‘children’ (sub-nodes) under it

You can also add or import memos directly into the **Memos** folder and link them to related sources or nodes if required. To see and manage all your memo links, click the **Links** button in **Navigation View**. Refer to the help for more information about working with memos.

To add children under this node:

- 1 Click the parent node. For example, click *Images of Volunteers*.
- 2 On the **Main** toolbar, click the **New** button.
- 3 Click the **Tree Node in this Folder** option.  
The **New Tree Node** dialog box is displayed.
- 4 Enter the required name and description.
- 5 Click **OK**.  
The node is added under the parent node. Add as many children as required.

To move a child node to the 'root level', drag it onto the **Tree Nodes** folder



You can sort nodes by clicking on the required column heading

You can drag and drop nodes to move them around the hierarchy

## Creating Cases and Attributes

You can create a case to gather all the information related to a particular research participant, site, institution or other object of your focus. Unlike other nodes, cases can have attributes such as *gender*, *age*, *location* and so on.

Attributes enable you to compare cases using demographic variables. For example, you could create a case for *Mary* and assign the attributes *female* and *urban*. In a focus group interview, you could code everything *Mary* said at the case called *Mary*. If you do this for all focus group participants, you can use queries to ask questions like: What did all the urban females say about a topic? How do their experiences differ from urban males?

## Adding Attributes

Although you can add attributes and values at any time, it is a good idea to consider them early in your project. **NVivo** also enables you to import an attribute table or *casebook*—refer to the help for information about how to do this.

To add attributes and their values:

- 1 In the **Navigation View**, click the **Classifications** button.
- 2 Click the **Attributes** folder.
- 3 On the **Main** toolbar, click the **New** button.
- 4 Click the **Attribute in this Folder** option.  
The **New Attribute** dialog box is displayed.
- 5 Enter a name in the **Name** field. For example, *gender*, *age*, *region*.
- 6 If required, enter a description of the attribute in the **Description** field.
- 7 Select the format of the attribute's values from the **Type** drop-down list. Choose **String** if the attribute has values that are words rather than numbers or dates—for example, *Gender = male, female*.
- 8 Click the **Values** tab.
- 9 In the **Values** tab, click the **Add** button.
- 10 Enter the value name in the **Value** cell. For example, *male*, *female*.
- 11 If required enter a description of the value.
- 12 Click the **Default** check box to specify that new cases will be allocated this attribute value as a default.
- 13 Click **OK**.

## Adding a Case

NVivo can automatically create cases from sources—refer to the help for more information.

To add a case to your project:

- 1 In the **Navigation View**, click the **Nodes** button.
- 2 Click the **Cases** folder.
- 3 On the **Main** toolbar, click the **New** button.
- 4 Click the **Case in This Folder** option.  
The **New Case** dialog box is displayed.
- 5 Enter a name in the **Name** field.
- 6 If required, enter a description of the case in the **Description** field.
- 7 If required, enter an alternate name for the case in the **Nickname** field. You can use this name as a quick way to code content at the case. Refer to the help for detailed information about quick coding with nicknames.
- 8 Click the **Attribute Values** tab and assign values to the case.
- 9 Click **OK**.

## Simple Coding

Coding allows you to gather together all the material related to a topic. For example, when participants describe volunteers as 'community-minded' you could code the references at the node *Community*. When you open the node, you can see all the references gathered there.

NVivo also provides advanced coding methods. You can run a text search query to find all occurrences of a word and then code these occurrences at a node—for example, you could search for all occurrences of the word 'fun' and code these at the node *Enjoyment*.

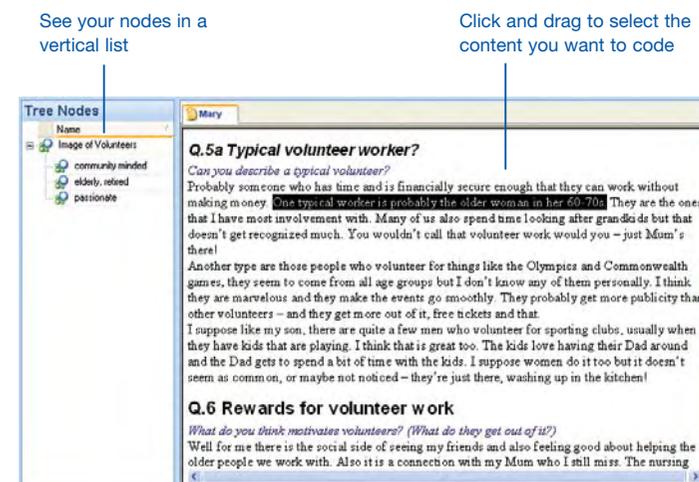
If you are dealing with structured information such as survey responses, you can use NVivo's auto code functions to code by paragraph, paragraph style or transcript field.

Refer to the help for more information about coding.

## Coding in a Document

To code document content—simply drag and drop:

- 1 Open the document you want to code—it is displayed in **Detail View**.
- 2 Open the required node folder to display the nodes in **List View**.
- 3 If required, re-arrange the views for easy coding—on the **View** menu, click **Detail View>Right**:



- 4 Select the content you want to code and drag it to the required node. To code at a new node:
  - a On the **Coding** toolbar, select the **Name** option from the **Code At** drop-down list.
  - b Enter a name for the new node in the next drop-down list.
  - c From the **In** drop-down list, select the location for the node.
  - d Click the **Code** button.

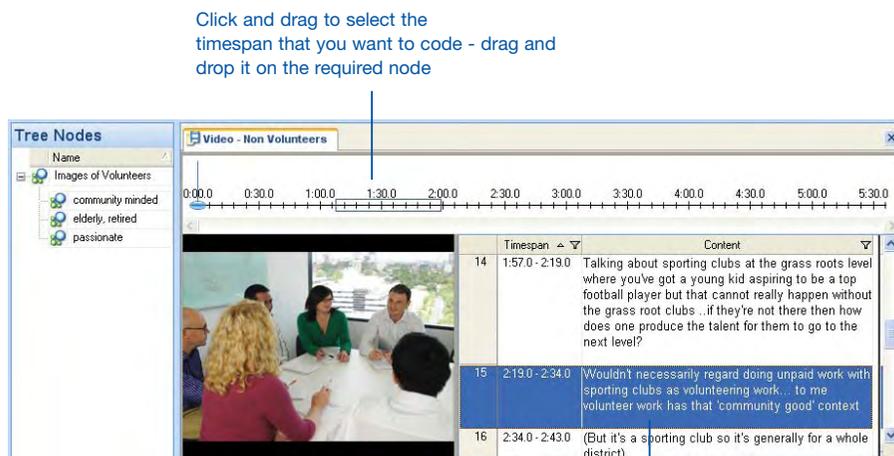
The content is coded at the node. If you open the node (by double-clicking on it), you can see coded content.

### Coding an Audio or Video Source

To code the content of an audio or video source:

- 1 Open the audio or video source you want to code—it is displayed in **Detail View**.
- 2 Open the required node folder to display the nodes in **List View**.
- 3 To code directly on the audio or video, select a portion of the timeline and drag and drop it on the required node.

To code text in the transcript, select a row and drag and drop it on the required node. You can also select specific text in the **Content** column and right-click to code at a node.



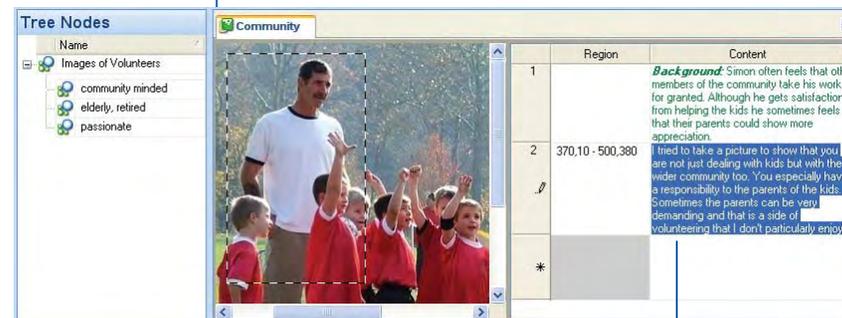
Select a transcript row and drag and drop it on the required node

### Coding a Picture

To code the content in a picture source:

- 1 Open the picture source you want to code—it is displayed in **Detail View**.
- 2 Open the required node folder to display the nodes in **List View**.
- 3 To code directly on the picture, click and drag to select the region you want to code. To code in the log, select the required text.
- 4 Drag and drop it on the required node.

Click and drag to select the region you want to code - drag and drop it on the required node



Select text and right-click to code it at the required node

To find out more about working with pictures in **NVivo**, refer to the help.

You can also use the **Coding** toolbar or the **Code** menu to code selected content—refer to the help for detailed instructions.

## Displaying Coding Stripes

Coding stripes are colored bars that enable you to see the:

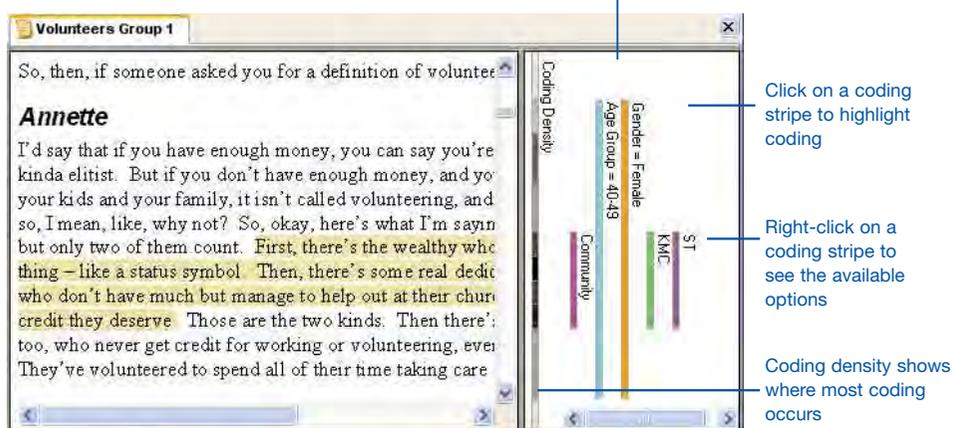
- Nodes that code content (for example, *Interview with Anna* could be coded at the node *Community* and the node *Retired*)
- Attributes of content coded at a case (gender, age and so on)
- Coding by specific researchers (useful if you are working in a team)

To display coding stripes:

- 1 Open the required source.
- 2 On the **View** menu, click **Coding Stripes**.
- 3 Click the **Selected Items** option to choose specific nodes, attribute values or users. You can also choose a pre-defined selection such as **Nodes Most Coding** or **Nodes Recently Coding**.

The selected coding stripes are displayed:

In this example, the coding stripes show the nodes (*community*), attribute values (*gender = female*) and users that code the highlighted text



You can also hover over a coding stripe to see more information. Coding stripes are updated as you code.

**Note:** While displaying coding stripes, the content of a source becomes read-only and you cannot edit it.

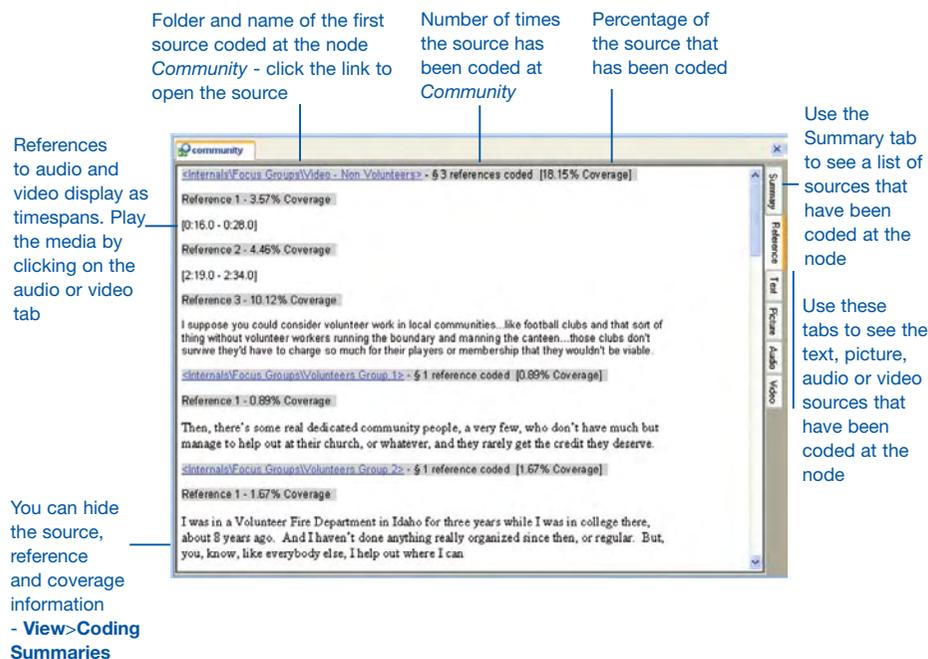
## Exploring a Node

To open a node and see all the references that have been coded there:

- 1 In **Navigation View**, click on **Nodes**.
- 2 Click the required node type.
- 3 In **List View**, double-click the required node.

The node is opened in **Detail View** with the **Reference** tab displayed. This tab provides a text-based view of all the references that have been gathered for a node—including references to video, audio and pictures.

For example, when you open the node *Community*—the **Reference** tab is displayed. You can use the vertical tabs on the right to see the text, pictures, audio and video that has been coded at the node *Community*:



If you click on the **Video** tab, you can see and play all the video excerpts that have been coded at **Community**:

These thumbnails show that two videos contain coding at **Community** - click one to see and play the coded content

On the timeline, you can see the timespans that have been coded

Click the **Play** button to play the coded sections of video - notice we have moved the Media toolbar to a new location

You can also see any transcript entries that have been coded at **Community**

The Audio and Picture tabs work in a similar way—refer to the help for more information about exploring nodes in **Detail View**.

When you explore the material gathered at a node, other ideas or categories may emerge—you can code node content and create new nodes as required.

## Moving on from Basics

When you are familiar with sources, nodes and coding you can begin to explore other features:

- Finding project items
- Querying your data
- Creating models
- Creating charts
- Running reports
- Exporting data

## Finding Project Items

**NVivo** provides a number of tools for finding and filtering your data. You can:

- Use the Find function to locate text in a source—on the **Edit** menu, click **Find**.
- Use the Find bar (at the top of **List View**) to find project items by name:



- Use **Advanced Find** to filter project items based on selected criteria—for example, find all the cases who are *women* or find all the cases who are *women, over 50*, and *retired*.
- Use **Grouped Find** to list selected items and find the items related to them. For example, you can view a selected source and the nodes that code it.

## Querying Your Data

You can create (and save) the following queries in **NVivo**:

- **Text Search Query**: lists all sources that contain specified text. This can provide a quick way of coding your sources—you can search for words and code the occurrences at a particular node.
- **Word Frequency Query**: lists words and the number of times they occur in selected items. Seeing which words appear most frequently can help you to identify themes and concepts.
- **Coding Query**: gathers content based on how it was coded. For example, show me all the content where *women* talked about *personal goals*.
- **Matrix Coding Query**: creates a matrix of nodes based on search criteria. For example, show me *attitudes about volunteering by age group*.
- **Compound Query**: combines text and coding queries—search for specified text in or near coded content.
- **Coding Comparison Query**: compares the coding of two researchers or two groups of researchers. This is useful for teams who are interested in coding consistency and the questions posed by researcher disagreement.

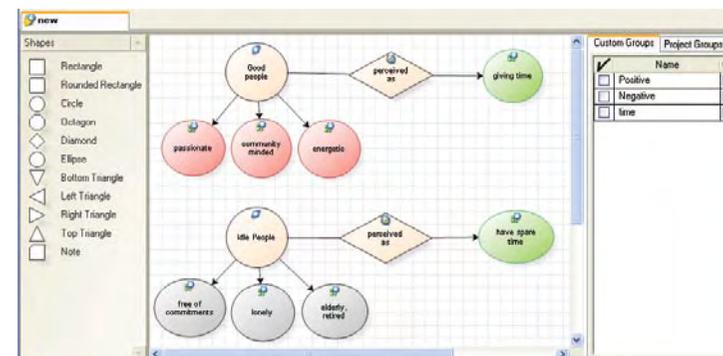
To create a query:

- 1 In **Navigation View**, click the **Queries** button.
- 2 Click the **New** toolbar button.
- 3 Select the **Query Type**.

Refer to the help for detailed information about setting up and running each type of query—the **'Working With Your Data'** section of the help provides tips, strategies and examples for working with queries.

## Creating Models

You can create models to visualize, explore and present the connections in your data. For example, you might use a model to plan your project and sketch your expectations or hypotheses:



To create a model:

- 1 In **Navigation View**, click the **Models** button.
- 2 On the **Main** toolbar, click the **New** button.
- 3 Click the **Dynamic Model in This Folder** button. The **New Model** dialog box is displayed.
- 4 Enter a name in the **Name** field.
- 5 If required, enter a description in the **Description** field.
- 6 Click **OK**. An empty model is displayed in **Detail View**—to work with the model in a separate window, uncheck **Docked** in the **Window** menu.

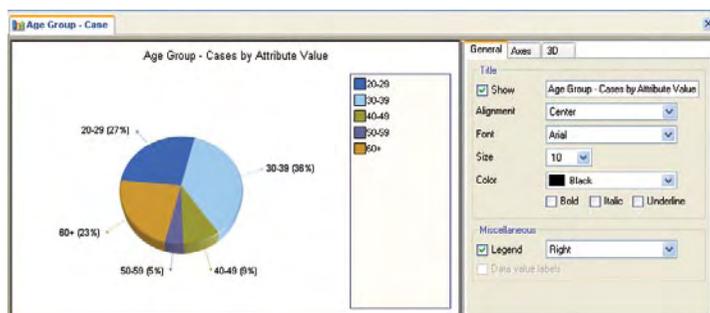
To add a shape to the model:

- 1 In the **Shape** panel, click a shape and drag it to the required location.
- 2 Double-click the shape to give it a name and description.
- 3 To associate the shape with an item in your project, right-click the shape and select **Convert to > Project Item**.

Refer to the help for detailed information about working with models.

## Creating Charts

You can create charts to visually present your coding data or display your matrix query results. For example, you might want to create a pie chart which shows the age groups of your survey participants.



To create a chart:

- 1 On the **Tools** menu, click **Charts**. The **Chart Wizard** dialog box is displayed.
- 2 Select the chart you want to create and click **Next**.
- 3 Select the data you want to chart in the options provided. These options will change depending on the chart you want to generate.
- 4 Click **Finish** to generate the chart. The chart will be displayed in **Detail View**.

You can change the display options and the data selected, even after the chart has been generated. Although you cannot save the chart within your project, you can copy and paste it into a memo or export it as an image file or PDF document.

Refer to the help for detailed information about working with charts.

## Running Reports

NVivo provides reports that enable you to check the progress of your project:

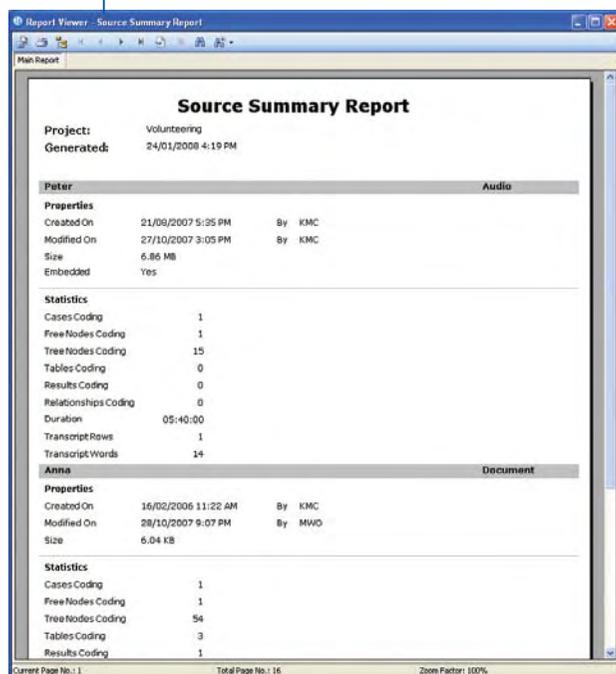
Report	Provides...
<b>Project Summary</b>	A list of the project status in terms of the items it contains. This can be useful for communicating or recording the overall progress of your project.
<b>Source Summary</b>	A list of the sources in the project including the number of nodes that code them. It also contains information about paragraph and word length.
<b>Node Summary</b>	A list of the nodes in the project including the number of sources coded at each node. This can help you to see which themes or ideas are occurring more than others.
<b>Relationship Summary</b>	A list of relationships organized by relationship type. This gives you an indication of how much coding has been done for each relationship type.
<b>Attribute Summary</b>	A list of attributes and the number of cases assigned to each attribute value. This is a useful way of checking for consistency and balance in the project sample.
<b>Coding Summary</b>	A list of sources and the nodes that code them—a useful way to check the progress of your coding. You can report on sources coded by all or selected users.

To run a report:

- 1 On the **Tools** menu, click **Reports**.
- 2 Select the required report.
- 3 Select options for the report layout.
- 4 Click **OK**.  
The report is displayed in the **Report Viewer**.

Reports can be printed or exported. You can export reports as an Excel spreadsheet, or as a document in .doc, .pdf, .htm or .rtf format.

Use these buttons to **Print, Export, Find text and Zoom**

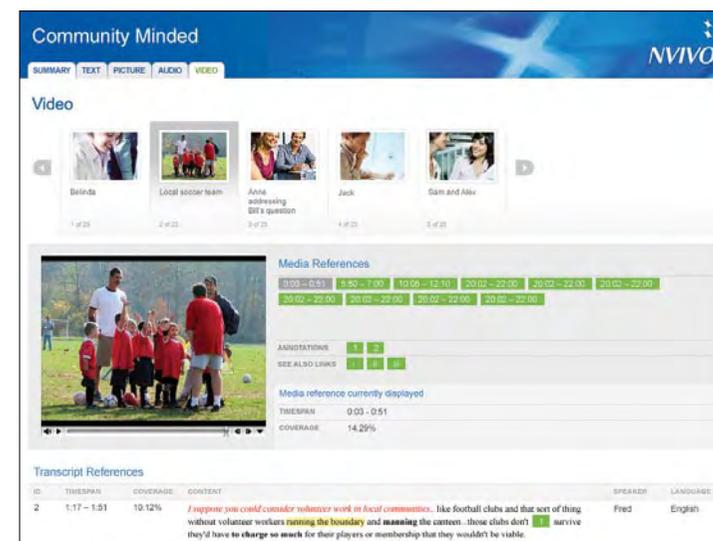


The **Source Summary** and **Node Summary** reports include information about the researcher who created or last modified a project item—this can be a useful way to manage the work done by project teams.

Refer to the help for detailed information about working with reports.

## Exporting Data

You can export various project items as HTML pages. This can be useful if you want to present your research project to others, or share information with people who do not have **NVivo**.



In this guide, we provide the steps for exporting a node as an example.

To export a node as HTML pages:

- 1 In **List View**, select the node you want to export. You can select multiple nodes by holding down the CTRL key while clicking.
- 2 On the **Project** menu, click on **Export <Node>**. The **Export Options** dialog box is displayed.
- 3 Select the content to export. These options will change depending on the project item you are exporting.
- 4 Click **OK**.
- 5 Select the folder where you want to export the node and click **Save**.  
For each node, **NVivo** creates a top-level HTML file and a folder of associated files. To open the exported node, locate the exported files and double-click on the top-level HTML file.

Other export options are available depending on the type of project item—for example, documents can be exported in .txt, .doc, .rtf, or .pdf formats. Refer to the help for detailed information about exporting project items.

## About the Sample Project

While there is no prescribed path through **NVivo**—since your approach depends on your data and methodology—it is useful to see how a simple project may be handled.

**Volunteering** is a sample project included with the software. You can access the sample project from the **NVivo** Welcome screen. It is a good idea to make a copy of the sample project—on the **File** menu, click **Copy Project**.

This small project consists of a series of interviews and group discussions, and the research data has been imported into **NVivo** as documents, audio/video files and pictures. You could create a similar project by following the high-level guidelines below:

### Project Set Up

In **NVivo**, create a new project and call it *Volunteering*. Set up participant attributes and their possible values. For example, **Gender**: *male, female*.

### Import Sources

Under **Internals**, create a folder called *interviews* and import document sources containing transcripts of the interviews into this folder. On import, let **NVivo** automatically create a case for each interview document—each document is coded at the case and any further material about that case can be coded there. As more data is gathered, create other folders and import audio, video and pictures.

### Auto Code by Heading Level

Auto code the interview documents by **Headings** to create nodes for each interview question—open a node to see all the answers in one place.

### Code Transcripts

Read and reflect on the interview and focus group documents, audio/video and picture data. Create and code at nodes as themes emerge. For example, create an *Images of Volunteers* tree node to gather perceptions of volunteer work.

### Explore Nodes

Open nodes to read and reflect on all the material gathered there. Create new nodes and 'code on' to capture ideas that arise from data.

### Filter and Query the Data

Use **Advanced Find** to filter project items. For example, find all cases that are *female* or all the interviews that are coded at *community minded*.

Use the **Query** tools to ask questions about the data—for example, give me the text where men describe volunteers as *community minded*.

### Discover Connections and Draw Models

Represent the connections you are seeing between participants' perceptions of volunteers. Now move to exploring (through models, coding, queries and memos) the ways in which these themes are impacted by other factors you find in the interviews.



For further information, please contact:

QSR International Pty Ltd  
info@qsrinternational.com  
www.qsrinternational.com

