The impossible just got possible

NVIVO 7

Getting Started

Get up and running with your NVivo Project

This guide provides information about installing NVivo 7 and introduces the basic steps to get you started

QSR International

www.qsrinternational.com

Contents

Introducing NVivo

Welcome to **NVivo**. This guide provides information about installing the application and introduces the basic steps to get you started.

For detailed information about using **NVivo**, refer to the following resources:

Resource	Description
NVivo Online Help	On the **Help** menu, click **NVivo Help** to access comprehensive information about working with **NVivo**. The help is organized in two parts: • ***Using the Software*** contains step-by-step instructions for working with the application. • ***Working With Your Data*** provides concepts and strategies that help you get the most out of the product.
NVivo Getting Started Tutorials	On the **Help** menu, click **NVivo Tutorials** to see animated demonstrations of how to create and set up a project. **Note:** To run the tutorials you will need the Adobe Flash player. If you do not have it installed, you will be prompted to download the player from the Adobe website: www.adobe.com
QSR Website and QSR Forum	The QSR website (www.qsrinternational.com) provides: • Frequently asked questions. • Product tour. • Latest product information. The QSR Forum (http://forums.qsrinternational.com/) is also a useful resource for tips on using **NVivo**.

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 number on your **NVivo** CD sleeve, or – if you downloaded the product – on 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	1GHz Pentium III-compatible or faster	1.6GHz Pentium III-compatible or faster
RAM	256MB or more	512MB or more
Video	800 x 600 or higher resolution	1024 x 768 or higher resolution
Operating System	Windows 2000 Service Pack 4 or later	Windows XP Service Pack 2 or later*
Hard Disk	Approximately 700MB of available hard-disk space	Approximately 1GB of available hard-disk space
Other		Internet connection

*NVivo 7 has passed the requirements for the Microsoft Works with Vista program. NVivo 7 is supported on 32 bit Microsoft Windows Vista.

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 NVivo 7.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** window is displayed.

3 Click the **Next** button.
The **License Agreement** is displayed. Read the agreement and, if you agree, click the **I accept the terms of the license agreement** option.

4 Click the **Next** button.
The **Registration** window is displayed.

5 Enter your **license key**. You can find this on your **NVivo** CD sleeve, or – if you downloaded the product – on the download email communication received from QSR.

6 Click the **Next** button.
The **Setup Type** window is displayed.

7 Choose the **Complete** set up option—this is recommended for most users.

8 Click the **Change** button if you want to change the default location for the application.
Software is commonly installed under **Program Files**.

9 Click the **Next** button.
The **Select Program Folder** window is displayed.

10 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.

11 Choose 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, clear the check boxes.

12 Click the **Next** button. The **Ready to Install Program** window is displayed.

13 Check the settings in the **Current Settings** list. To change a setting, click the **Back** button. To continue the installation, click the **Install** button.

14 When the files have been copied, the **Installshield Wizard Complete** 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, click the check box.

15 Click the **Finish** button.
To start **NVivo**, double-click the **QSR NVivo 7** icon on your desktop.

Note: If you are a system administrator installing and activating **NVivo 7** on multiple computers, you can perform a 'silent install' using MSI command line techniques. Refer to the ***NVivo 7** Network Administrator's Guide* for more information. You can download this guide from the QSR website (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 activate your license by:

- Providing an activation request to QSR.
- Entering the activation key provided by QSR.

To provide an activation request:

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 the **Activate via Mail/Fax** or **Phone** options.

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 Click the **Print** button to print the **Activation Request** form.

6 Contact QSR using the details provided on the form.

Entering the Activation Key provided by QSR:

1 On the **Help** menu, click **Activate License**.
The **Activate** screen is displayed.

2 In the **Activation Key** field, enter the **Activation Key** provided by QSR.

3 Click the **Activate** button.

Removing NVivo

To remove the **NVivo** software from your computer:

1 On your Windows **Start** menu, click the **Control Panel** option.
The **Control Panel** is displayed.

2 Click the **Add or Remove Programs** option.

3 Choose **QSR NVivo 7** from the list of currently installed programs.

4 Click the **Change/Remove** button.
The **InstallShield Wizard** is displayed.

5 Click the **Remove** option.

6 Click the **Next** button.
You are prompted to confirm the removal of **NVivo**.

7 Click **OK**.
NVivo files are 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 **Add or Remove Programs** 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. Components to be removed in the following order are:

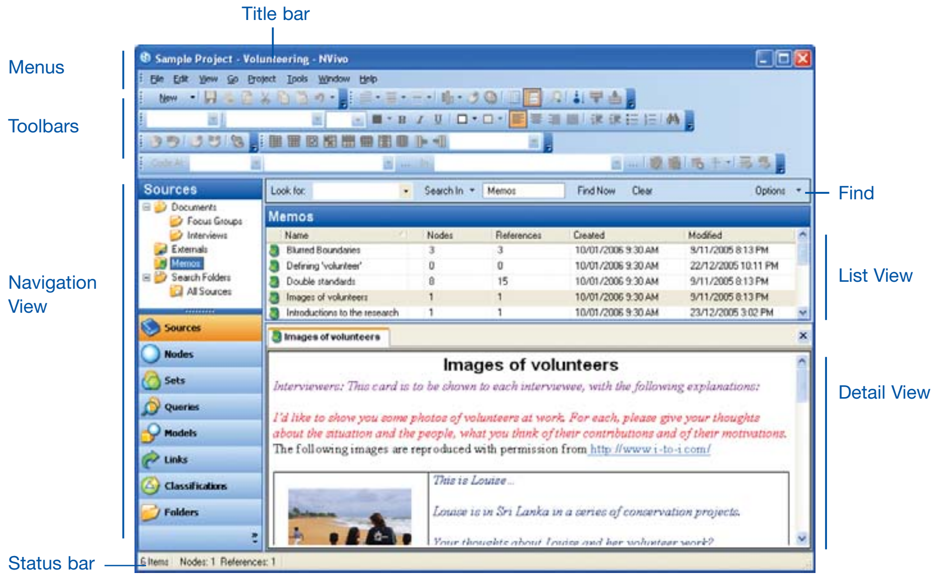
- Crystal Reports for .NET Framework 2.0
- Microsoft SQL Server 2005
- Microsoft .NET Framework 2.0

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 online help for detailed instructions.

The workspace is made up of the following components:



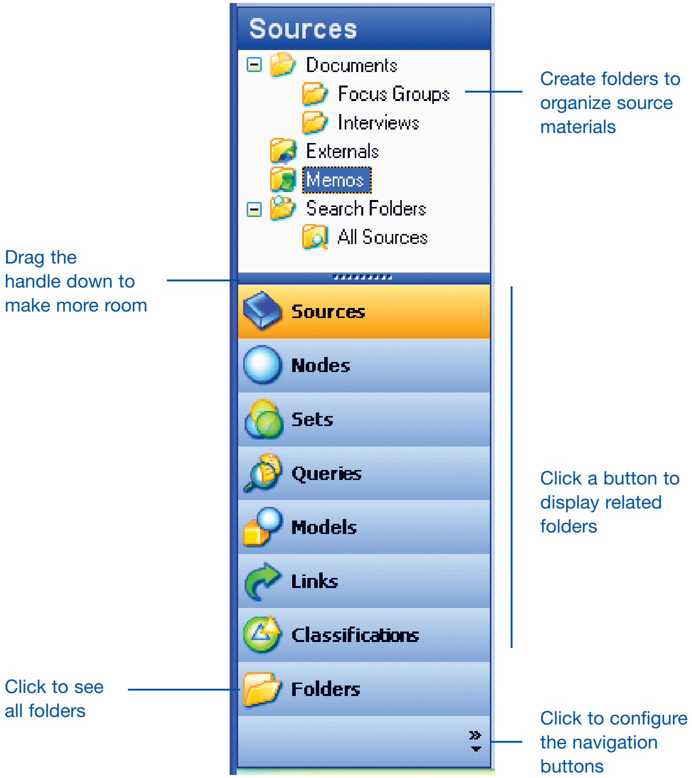
In **NVivo**, you work with your project items in three main *views*:

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

The menus and toolbars buttons are ‘context-sensitive’ and change depending on the views you are working in.

Navigation View

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



The Components of a Project

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

Component	Description
Sources	In **NVivo**, 'sources' is the collective term for your research or project materials—anything from interview transcripts to video of research settings. Sources are categorized into the following types: • **Documents**: source materials such as field notes, transcripts, interviews, literature reviews or whatever material is relevant to your project. You can import them or create them directly in **NVivo**. • **Externals**: 'proxy' sources representing material that you cannot import into **NVivo** (newspaper articles, books, video footage or audio tape). 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. • **Memos**: 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.
Nodes	You can 'code' sources to gather material by topic, for example, you could gather all the content relating to the concept of *community*. The container for references to this material is called a 'node'. **NVivo** provides the following types of nodes: • **Free Nodes**: 'stand-alone' nodes that have no clear logical connection with other nodes—they do not easily fit into a hierarchical structure. • **Tree Nodes**: 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). • **Cases**: 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. • **Relationships**: nodes that describe the connection between two project items. For example, the relationship between two cases (*Anne* loves *Bill*) or between two nodes (*Poverty* impacts *Health*). • **Matrices:** 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.
Sets	Sets provide a flexible way of grouping project items of different types. For example, you might create a set for the documents, memos and nodes that belong to a specific team member.
Queries	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.
Models	Models can illustrate initial ideas about your project or identify emerging patterns and connections. Make a 'static' model to capture your project at a specific point in time.
Links	**NVivo** provides the following ways to link your data: • **Memo Links**: use memo links to attach a memo to the source or node that is related to it.

Component	Description
Links	• **'See Also' Links**: use 'See Also' links to place pointers between the content of sources or nodes. • **Annotations**: like scribbled notes in a margin, annotations enable you to comment on selected content.
Classifications	**NVivo** enables you to classify: • **Cases** by setting up attributes such as gender, age and location. • **Relationships** by setting up relationship types *(loves, impacts, employs, is married to* and so on).

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.

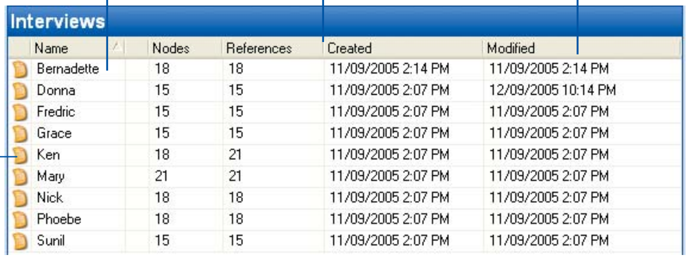
This **List View** displays the contents of a folder:

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



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**:

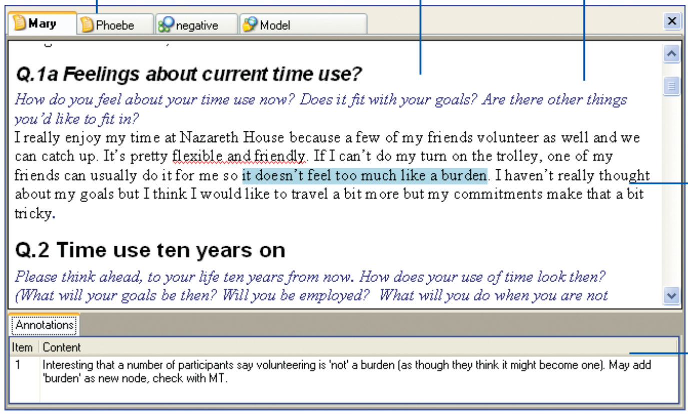
Open multiple items and move through them using the tabs

Apply styles and text formatting

Select content and code it at a node

Create 'See Also' links

Add and view annotations



In **Detail View** you can also:

- Open and explore a node to see the content gathered there. If required, you can *code on* from the node.
- Display a node summary listing each source coded at the node.
- Display the results of a query.
- Undock the view from the workspace and work in a separate window.

Refer to the online help for information about performing these tasks.

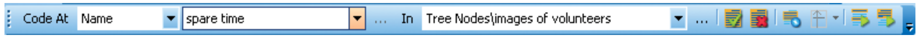
Working with Toolbars

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 **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:

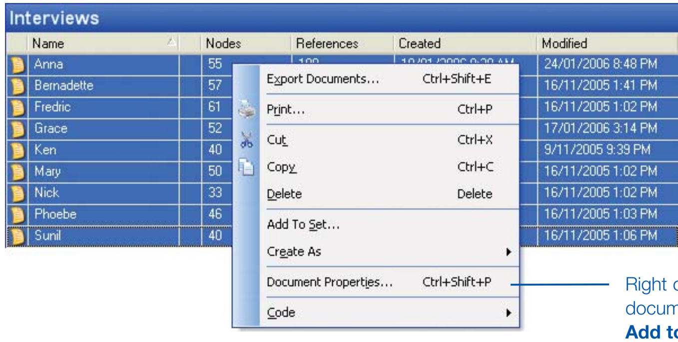
Click the handle and drag a toolbar to a new location

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

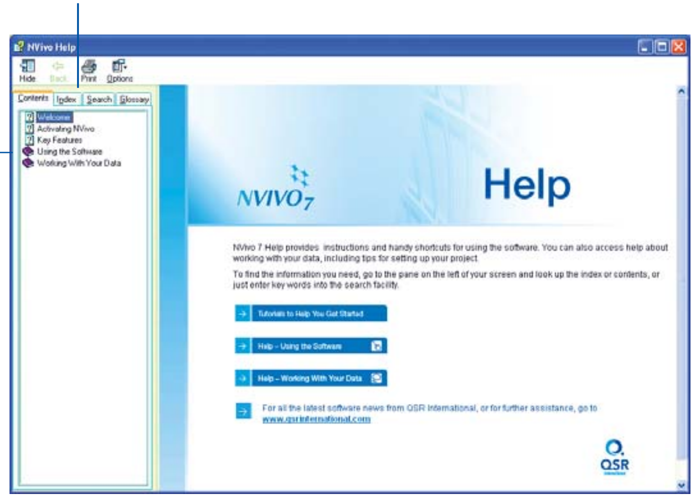
Using Help

This guide provides the instructions for getting up and running with an **NVivo** project. For more detailed information about using the software and working with your data, refer to the **NVivo** online help. To access the help, click the **NVivo Help** option on the **Help** menu.

Use the tabs to access an index, search facility and glossary

The help is divided into **Using the Software** and **Working With Your Data**

Double-click on a book icon to see the topics below it



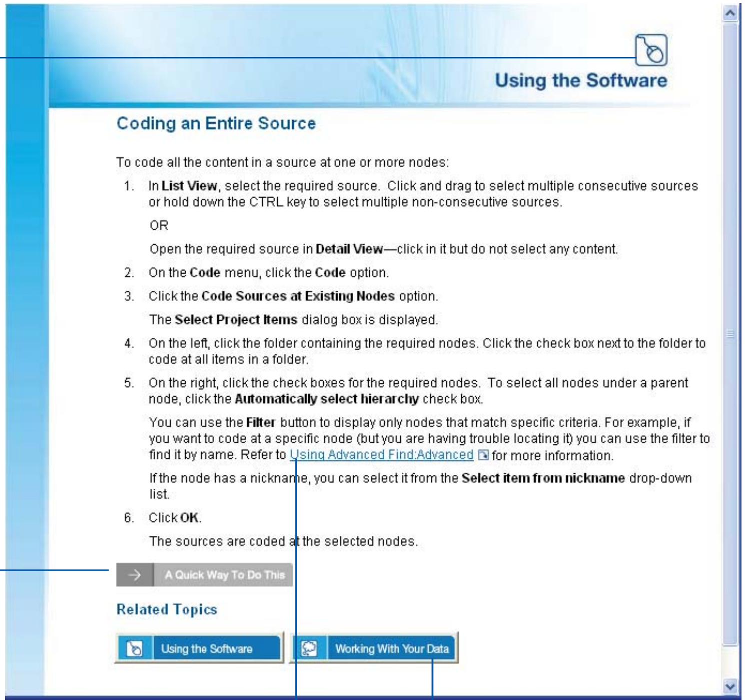
Help – Using the Software

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

This icon indicates that this is a help topic from the **Using the Software** section

These topics introduce **NVivo** terminology and provide step-by-step instructions for completing tasks

Click to see alternative ways of completing the task



Click drop-down arrows to access detailed information

Click the buttons for related concepts or instructions

Help – Working With Your Data

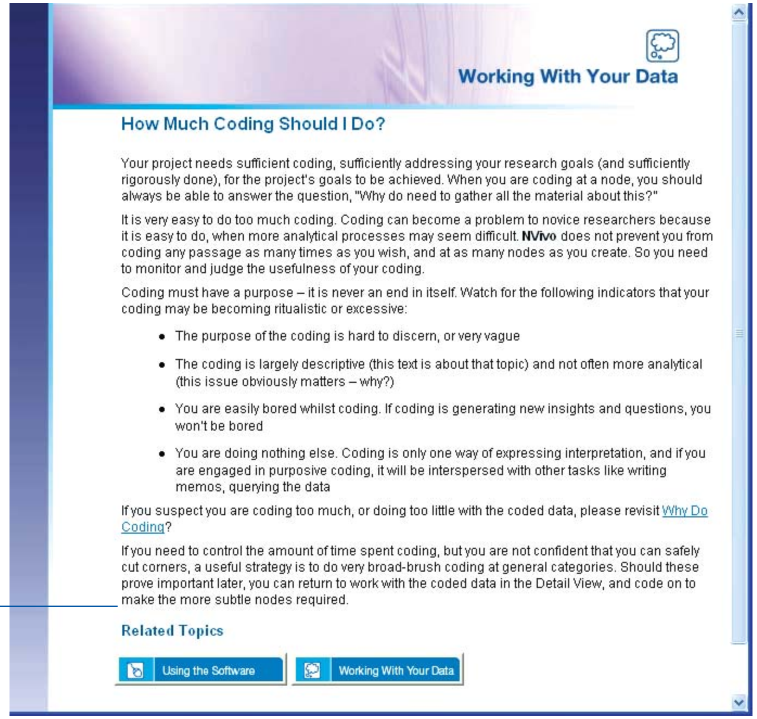
The help topics under **Working With Your Data** provide concepts and strategies that help you to handle your data—everything from 'How to Get Started' to 'How to Assess My Project'.

Notice that the color of these topics differs from **Using the Software** topics—so you always know what type of information you are reading

This icon indicates that this help topic is from the **Working With Your Data** section

These topics provide concepts, tips, strategies and examples for handling your data

Click a button for related instructions or concepts



NVivo Basics

It is easy to get up and running with an **NVivo** project. This guide will take you through the basic steps involved in:

- Creating a Project
- Gathering Sources
- Creating Nodes
- Simple Coding

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

- Adding ‘See Also’ links and annotating text
- Running queries to find patterns in the data
- Drawing models to visualize connections in the data
- Running reports

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

Creating a Project

When you save a project it is stored on your computer as an .nvp file. Since all your project data is stored in a single file, you can easily back it up by copying it to a new location.

To create a new project:

1 Click the **QSR NVivo 7** icon on your desktop to open the application.

2 On the **Welcome** screen, click the **New Project** button.
The **New Project** dialog box is displayed.

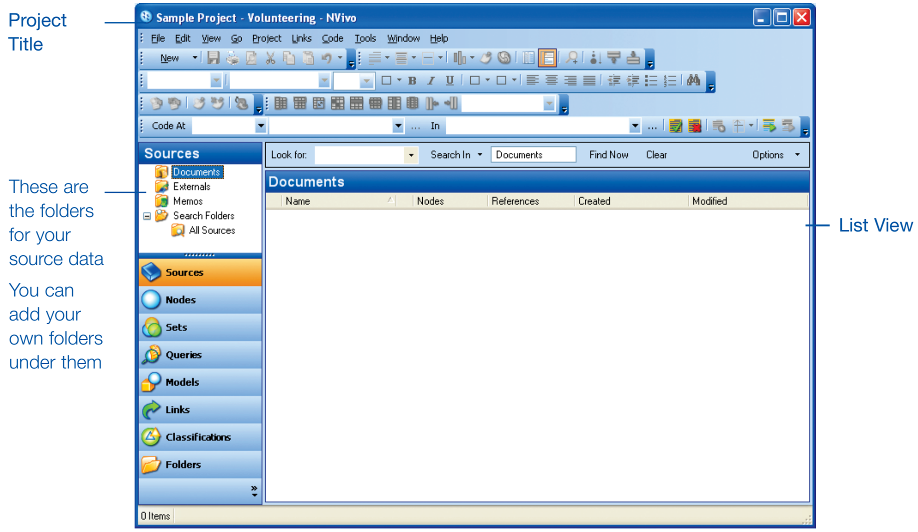
3 Enter a name for your project in the **Title** field.

> **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.

4 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.

5 To change the location of the project, click the **Browse** button.

6 Click **OK**.
The **NVivo** window is displayed with the name of your project in the title bar:



Upgrading Projects from Previous Versions

This version of **NVivo** will allow you to open projects from **NVivo 1**, **NVivo 2**, **N4**, **N5** or **N6**. 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** (.nvp)
- **NVivo 1** or **2** (.qda)
- **N4**, **N5** or **N6** 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 the required **Import Options**. Refer to the **NVivo** online 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.

Importing Projects

You can merge projects by importing one project into another. This can be useful if you are working in a team or if you want to use an existing project's structure when creating a new project.

Refer to the online help for detailed information about importing projects.

Gathering Your Source Materials

In **NVivo**, 'sources' is the collective term for your research materials—anything from hand-written diaries to interview transcripts. After creating a project, you can gather your research data in the following ways:

- **Import documents** that are in text (.txt), rich text (.rtf) or Word (.doc) format. This might include interview transcripts, emails, literature reviews and so on. You can also create documents directly in **NVivo**, refer to the online help for more information.
- **Create 'externals'** for files that you cannot import—audio or video files, hand written diaries, books, newspaper articles and so on.
- **Create or import memos** to record your thoughts and observations. For example, you could create a *project journal* or *log* to capture information about the progress of your project.

Importing Documents

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

To import your source documents:

1 Click the **Documents** folder.

2 On the **Project** menu, click **Import Documents**.
The **Import Documents** dialog box is displayed.

3 In the **Import from** field, click the **Browse** button.

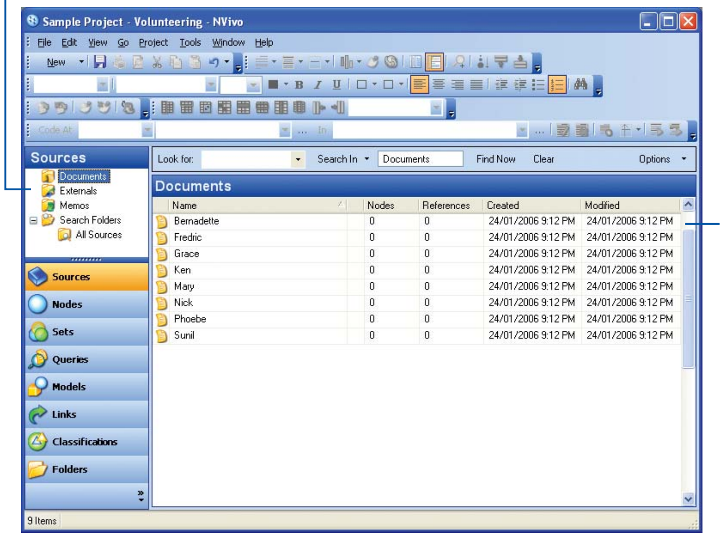
4 Locate the documents you want to import. Hold down the CTRL key to select multiple files or the SHIFT key to select a range of files.

5 Click the **Open** button.
The selected files are displayed in the **Import from** field.

6 Select the required **Options**:

Option	Description
Update text styles	Update the text styles of the source to those set in the **Project Properties**.
Create descriptions	Use the first paragraph of the imported document to create the document description. To see the description for a selected document, click **Document Properties** on the **Project** menu.
Code sources at new cases located under	Click this option to automatically create a case for each document. This is useful if your documents 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 online help for more information about working with cases.
Create as read-only	Click this option to import the document as read-only. This means you can code and add annotations or links to the document but you cannot edit the text.

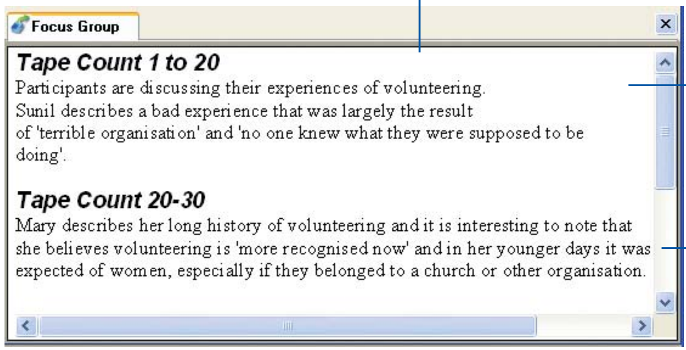
7 Click **OK**.
The imported documents are displayed in **List View**:



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 an external for a focus group audio recording:

You can open the audio file and play it as you summarize the contents—click **Project>Open External File**



NVivo can automatically create these 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. Click the **New** toolbar 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
File link	The item is stored on your computer as an executable file. For example, a video, audio or image file. If you choose this option, you can create a link to the file. In the **File Path** field, click the **Browse** button and locate the file.
Web link	The item is a web page. You can create a live link to the web page by providing the web address in the **URL Path** field.
Other	The item is not stored on your computer. For example, it might be a book or a diary in hand-written format. You can specify the physical location in the **Location description** field—*top shelf of bookcase*.

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 will become the headings *chapter 1*, *chapter 2* and so on.
   c. Enter a start and end range—*1 to 20*
8. Click **OK**.

   The external is created and you can begin entering your notes or summaries. You can create 'See Also' links from within your documents to external files. For example, while exploring a document you could open a related website or audio file—refer to the online 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.

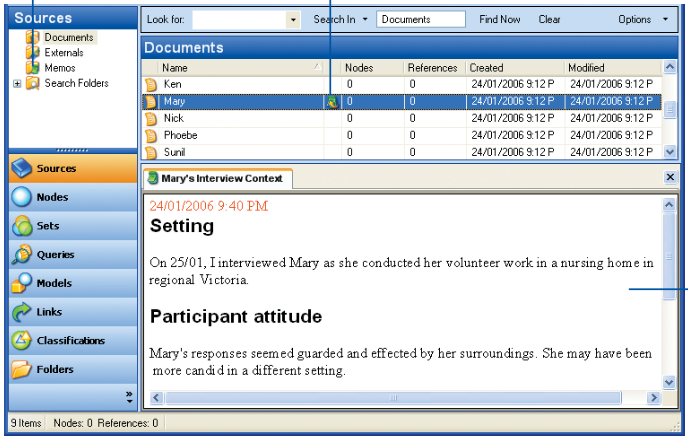
To create a linked memo while working in a source:

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 the document is linked to a memo



Enter and format the memo content as required

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

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 detail about working with other node types, refer to the online help.

To create tree nodes:

1 In the **Navigation View**, click the **Nodes** button.

2 Click the **Tree Nodes** folder.

3 Click the **New** button on the main toolbar.

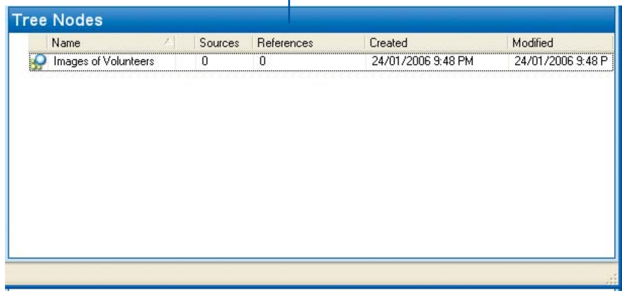
4 Click the **Tree Node in this Folder** option.
The **New Tree Node** dialog box is displayed.

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



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

If required, you can add children under it

To add children under this node:

1 Click the parent node. For example, click Images *of Volunteers*.

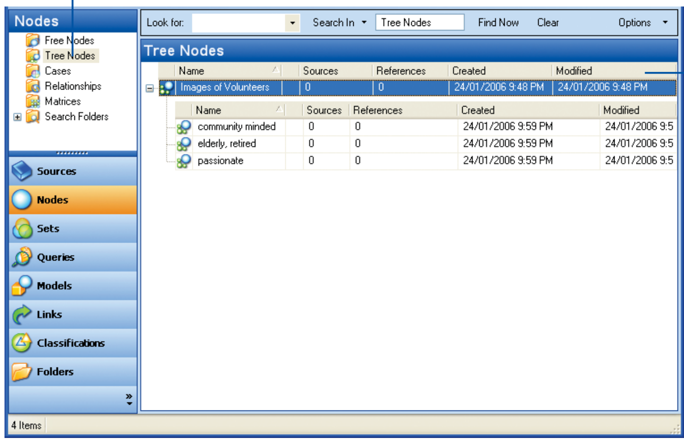
2 Click the **New** button on the **Main** toolbar.

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 can compare *male* with *female* or *regional* with *urban*.

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 online 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. Click the **New** toolbar 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** checkbox 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 online 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. Click the **New** toolbar 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 online 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

You can code your sources to gather all the material related to a topic. For example, when participants describe volunteers as 'older' you could code the text at the *elderly, retired* node. When you open the node, you can see all the references gathered there.

NVivo also provides more advanced features for:

- Auto coding by heading level
- Auto coding by paragraph
- Coding by text search

Refer to the online help for more information about these features.

Coding at an Existing Node

It is easy to code source content at an existing node—simply drag and drop. To do this:

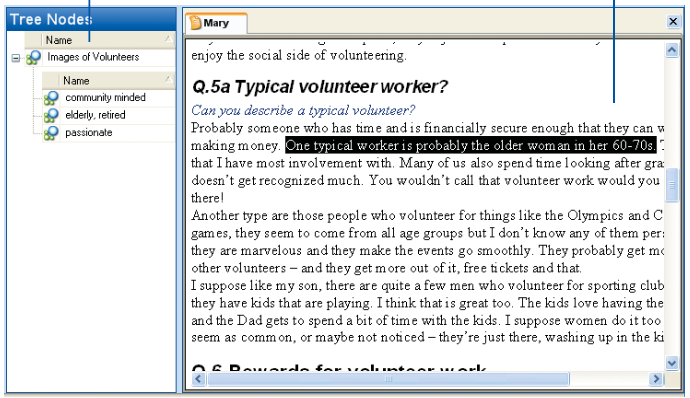
1 Open the source you want to code—it is displayed in **Detail View**.

2 Open the required node folder to display the nodes in **List View**.

3 If required, re-arrange the views for easy coding—on the **View** menu, click **Detail View>Right**:

See your nodes in a vertical list

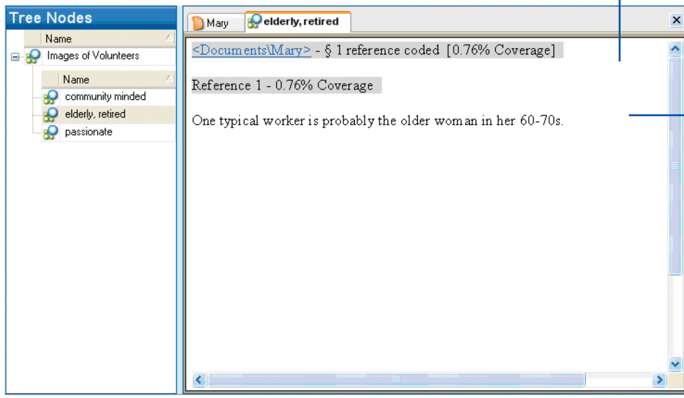
Click and drag to select the content you want to code



4 Select the source content you want to code and drag it to the required node.

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

Open the node to see what has been coded—each time you code at *elderly*, *retired* a reference will be added to the node display



You can customize the node display, refer to the online help for more information

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

Coding at a New Node

New ideas and themes may emerge as you code your sources. To code at a new node:

1 Open the source you want to code and select the required content.

2 On the **Coding** toolbar, select the **Name** option from the **Code At** drop-down list.

3 Enter a name for the new node in the next drop-down list.

4 From the **In** drop-down list, select the location for the node.

5 Click the **Code** button.
Selected content is coded at the newly-created node.

You can also create a new free node based on selected text by choosing the **Code In NVivo** button on the **Coding** toolbar—refer to the online help for more information.

Displaying Coding Stripes

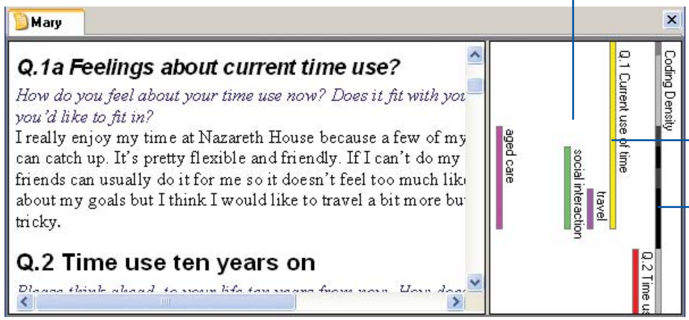
Coding stripes enable you to see the nodes that code a source. You can see a maximum of seven nodes when you display coding stripes.

To display coding stripes:

1 Open the required source.

2 On the **View** menu, click **Coding Stripes**.

3 Click the required display option.



Exploring a Node

When you open a node you can see all the content that has been coded at it. To open a node:

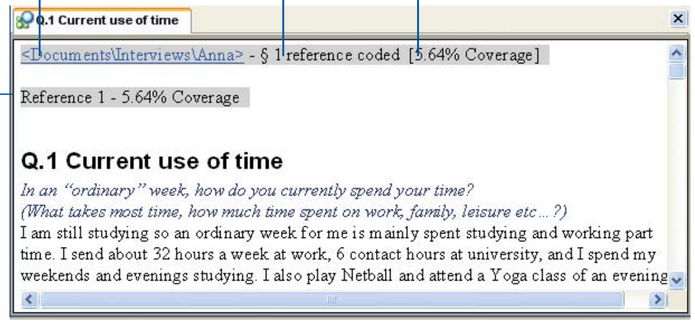
1 In **Navigation View**, click the **Nodes** button.

2 Click the required node folder.

The nodes are displayed in **List View**.

3 Double-click the required node.

The node is displayed in **Detail View**.



Refer to the online help for more information about exploring node content 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.

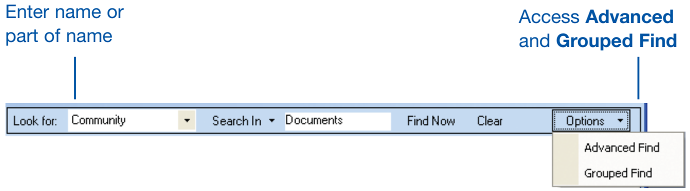
Moving on from Basics

When you are familiar with sources, nodes and coding you can begin looking at the tools for finding, querying and modeling. This guide provides an introduction to these tools—refer to the online help for detailed instructions.

Finding Project Items

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

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



- Use **Intermediate Find** to filter project items based on selected criteria—for example, find all the cases who are *women*.
- Use **Advanced Find** to build a list of criteria for filtering your project items. For example, you could find all the cases who are *women* over *50* who have a *positive* attitude towards volunteering.
- Use **Grouped Find** to list selected items and find the items related to them. For example, you can list sources and the nodes that code them.

Querying Your Data

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

- **Text Search**: to get a list of all sources that contain specified text and code them if required.
- **Coding**: to gather content based on how it was coded. For example, show me all the content where *women* talked about *personal goals*.
- **Matrix Coding**: create a matrix of nodes based on search criteria. For example, *show me attitudes about volunteering by age group.*
- **Word Frequency**: to get a list of 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.
- **Compound**: combine text and coding queries.

To create a query:

1 In **Navigation View**, click the **Queries** button.

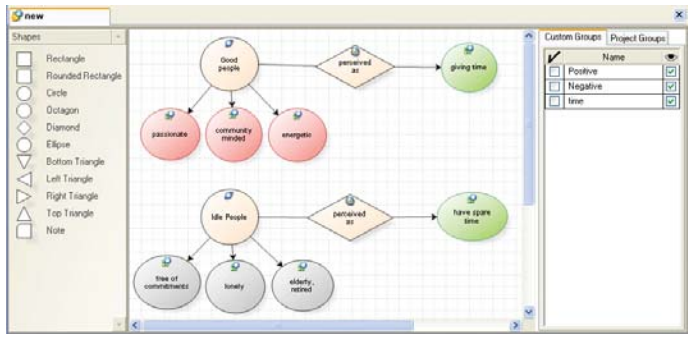
2 Click the **New** toolbar button.

3 Select the **Query Type**.

Refer to the online help for detailed information about setting up and running each type of query—the **'Working With Your Data'** section of the online 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 add a model:

1 In **Navigation View**, click the **Models** button.

2 Click the **New** toolbar 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 online help for detailed information about working with models.

Reports

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

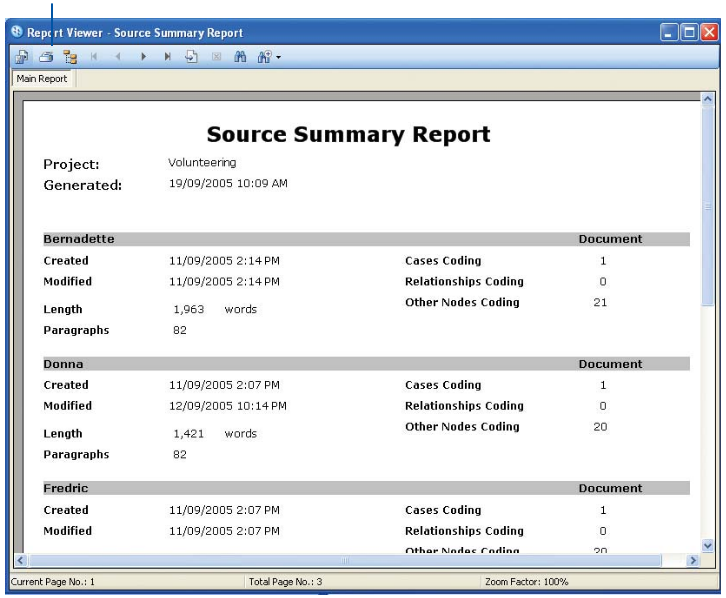
Report	Provides...
Project Summary	A list of the project status in terms of the items it contains. This can be useful for communicating or recording the overall progress of your project.
Source Summary	A list of the sources in the project including the number of nodes that code them. It also contains information about paragraph and word length.
Node Summary	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.
Relationship Summary	A list of relationships organized by relationship type. This gives you an indication of how much coding has been done for each relationship type.
Attribute Summary	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.
Coding Summary	A list of sources and the nodes that code it—a useful way to check the progress of your coding.
Coding Comparison	An outline of the similarities and differences in coding between two project items. This assists in checking for consistency in the coding and supports comparison of coding across team members.

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**:

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



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

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 7** welcome screen.

It is a small project containing interviews and focus groups, with the transcripts imported into **NVivo**. Here is a high-level description of how the project was developed:

Project Set Up

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

Import Sources

Under Sources, create a documents folder called interviews and import interview transcripts into this folder. On import, let **NVivo** automatically create a case for each transcript—each transcript is coded at the case and any further material about that case can be coded there.

Auto Code by Heading Level

Auto code the transcripts by *Heading level 1* to create nodes for each interview question—open a node to see all the answers in one place.

Code Transcripts

Read and reflect on interview and focus group transcripts. 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 participant's perceptions of volunteers. Now move to exploring (through models, coding, query and memos) the ways in which these themes are impacted by other factors you find in the interviews.

The impossible just got possible

NVIVO 7

For further information, please contact:

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

QSR International