NVivo 8 Help
Using the Software

This is a printable version of the NVivo 8 help that is built into the software. The help is divided into two sections - Using the Software and Working with Your Data. This section of the help contains step-by-step instructions and provides the fundamental information you need to work with the software.

Creating Memos

A memo is a type of source in NVivo. It can be linked to a specific source or node.

To create a new memo:
1. In Revolution View, click the Sources button.
   The sources folders are displayed.
2. Click the Memos folder. If you have created other memo folders, you can select one of those.
3. Click the New button button.
4. Click the Memo in This Folder option.
   The New Memo window is displayed.
5. Enter a name in the Name field.
6. If required, enter a description of the source in the Description field.
7. Click OK.
   The new memo is opened in Detail View and you can add the required content.

To electronically navigate through this help and link to other topics, go to the NVivo Help under the Help menu in your NVivo 8 software.

Click a button for related instructions or concepts.
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Introduction

What's New

**NVivo 8** provides major new features and enhancements that can enrich your research and save you time. Learn about the new features and access the related help topics:

Documents

You can now import Adobe PDF (.pdf) and Microsoft Word 2007 (.docx) documents. Refer to [Importing Documents](#) for more information.

Audio and Video

Take advantage of new tools that enable you to import, play and analyze audio and video files. You can transcribe the media in **NVivo** or import an existing transcript. If you do not require a transcript, you can code, annotate and link directly on the media. Refer to these topics to get started:

- [About Audio and Video](#)
- [Importing Audio and Video](#)
- [About Transcripts](#)
- [Coding Audio and Video Sources](#)

Pictures

You can now import digital pictures such as photos taken in the field or pictures used to elicit participant responses. You can add text descriptions (picture logs) for selected regions of a picture or for the picture as a whole. You can code and annotate directly on the picture or work with the picture log—or do a mixture of both. Here are some useful help topics:

- [About Pictures](#)
- [Working with Log Entries](#)
- [Coding Picture Sources](#)
- [Making a Picture Gallery](#)

Coding Stripes

**NVivo 8** provides enhanced coding stripes that enable you to explore demographic attributes. For example, you can display a stripe to show everything coded at cases to which the attribute value 'male' has been assigned. You can also display a stripe to see what has been coded by a particular researcher. To find out more about coding stripes:

- [About Coding Stripes](#)
- [Displaying Coding Stripes](#)

Thumbnails

Preview your data using the new thumbnail view—an easy way to see and work with your videos and pictures. Refer to [Viewing Thumbnails in List View](#) for more information.
Export

Export your data to HTML files and create a mini-website—a great way to present your findings or share material with colleagues. For example, you could export a node that contains all the references to Community. You could then use your Internet browser to view all the related text, audio, video and images. Refer to Exporting Items for more information.

Charts

Create colorful 2D and 3D charts using the Chart Wizard. Charts help you analyze coding—for example, you can compare the nodes coding a particular source, or look at coding by attribute values such as age or gender. You can also generate charts to visually display matrix query results. Refer to these topics to get started:

- About Charts
- Creating Charts
- Copying and Exporting Charts

Teamwork

Create ‘user profiles’ to support teamwork. Each team member is identified by their user name and initials which allow you to track work done by different team members—you can check their coding and see what sources they have created or modified. You can use the Coding Comparison Query to check coding consistency across the team. To find out more about teamwork:

- Meeting the Challenges of Teamwork
- Working in Teams
- Adding User Profiles
Managing Your NVivo Software

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.

To activate NVivo

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 dialog box is displayed.
3. Click the Activate via Internet option.
   Enter your details. Those marked with an asterisk (*) must be provided.
   Click Activate.

   If you need a user name and password to access the Internet on your network, you may be prompted to enter your network credentials (user name and password) when activating NVivo. Contact your network administrator if you have any difficulty with your network credentials.

If you do not have an Internet connection, you can activate your license by:

1. Sending an activation request to QSR by email, mail, fax or phone
   a. On the Help menu, click the Activate License option (or select Activate Now on the activation reminder).
   b. The Activate dialog box is displayed.
   c. 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.
   d. Enter your details. Those marked with an asterisk (*) must be provided.
   e. Click the Generate button to obtain an Installation Key. (This key must be provided to QSR along with your details).
   f. 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 8 Activation Request form. Contact QSR using the details provided on the form.
2. **Entering the activation key provided by QSR**
   a. On the Help menu, click Activate License.
   b. The Activate dialog box is displayed.
   c. Click Activate via Email, Mail/Fax or Phone.
   d. In the Activation key field, enter the Activation Key provided by QSR.
   e. Click the Activate button.

### Deactivating NVivo

You may want to deactivate the NVivo license on a particular computer. For example, if you get a new computer, then you should deactivate the NVivo license on your old computer, before installing and activating NVivo on your new computer.

**To deactivate NVivo**

1. Ensure that you are connected to the Internet.
2. If you have an NVivo project open, you must close it before you can deactivate the license—on the File menu, click Close Project.
3. On the Help menu, click the Deactivate License option.
4. Click Yes to confirm.
   NVivo deactivates the license and displays a message confirming that the license has been deactivated.
5. Click OK.
   The NVivo application automatically closes.

If you need a user name and password to access the Internet on your network, you may be prompted to enter your network credentials (user name and password) when deactivating NVivo. Contact your network administrator if you have any difficulty with your network credentials.

If necessary, you can re-activate a deactivated license. Simply launch NVivo and then follow the normal procedure for activation.

### License Expiry Reminders

NVivo alerts you when your license is about to expire. If your license is about to expire, contact QSR Support to obtain a new license or an extension to your existing license.

**More on expiry reminders**

NVivo will notify you when your license is about to expire.

The License/Trial Expiry Reminder dialog box displays the days remaining before your license/trial expires, and allows you to choose when you will be reminded again.

To change the reminder interval:

1. In the Remind Me field select when you want to be reminded next. If you do not want to be reminded again, select Never.
2. Click OK.
Software Updates

**NVivo** can automatically check for updates to your installed software. Software updates can include enhancements or fixes for known issues.

More on software updates

**NVivo** automatically checks for software updates every 7 days, and notifies you when an update to your installed **NVivo** software is available. If you do not want **NVivo** to automatically check for software updates, you can disable automatic checks—for more information refer to Setting Application Options.

If you have turned off automatic checks for software updates, you can do a one-off check for software updates whenever you choose.

To do a one-off check for software updates:

1. Ensure that you are connected to the Internet.
2. On the Help menu, click Check for Software Updates.

   **NVivo** checks whether any software updates are available for download. If any software updates are available, the **NVivo - Software Update Available** dialog box is displayed.

The **NVivo - Software Update Available** dialog box provides a description of the software update. You have the following options:

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<th>Option</th>
<th>Description</th>
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<tr>
<td>Download Now</td>
<td>Select this option to download and install the software update.</td>
</tr>
<tr>
<td>Remind Me Later</td>
<td>Select this option if you do not want to download the update now, but want the opportunity to download it in the future. You will be reminded about the update the next time that <strong>NVivo</strong> checks for software updates.</td>
</tr>
<tr>
<td>Ignore Update</td>
<td>If you select this option, <strong>NVivo</strong> will ignore this update. You will not be notified about this particular update again.</td>
</tr>
</tbody>
</table>
Navigating NVivo

Introducing the NVivo Workspace

NVivo is designed so you can easily see and manage all the elements of your project. You can also customize the workspace to suit the way you work.

Views

The NVivo workspace is made up of three views.

Navigation View

This view provides access to all your project items. Items are organized under group buttons such as Sources, Nodes, Sets and so on. When you click on a folder in Navigation View, its contents are displayed in List View.

In Navigation View you can:
- Add folders for sources, queries or models.
- Cut, copy and paste user folders.
- Drag items from List View into the required folders.

List View

This view displays the contents of your folders. You can double-click an item in List View to open it in Detail View.

In List View you can:
- Sort items (by clicking on the column headings)
- Add selected items to sets
- Delete, cut, copy, paste, print and export items

Detail View

In this view you can explore the content of your project items. For example, in Detail View you can:
- Open a source to examine and code its content
- Open a node to see all the content gathered there
- Examine the results of a query

You can have multiple items opened in Detail View and use the tabs to move between them.

To close an item, click the X in the top-right of the Detail View.
To close all open items, click Close All on the Window menu.
Menus

The menu bar is at the top of the application window. Menus are 'context sensitive' and change depending on the items or views you are working with — for example, the Media menu only appears on the menu bar when you are working with an audio or video file.

You can access all NVivo functions via the menus on the menu bar.

Context (right-click) menus are also available throughout the application. You can access the most frequently-used functions via the context menus.

Toolbars

For fast access to many functions, you can use the following toolbars:

Main

Use the Main toolbar to perform common tasks such as saving, printing and undoing the previous action:

View

Use the View toolbar to adjust display settings for your sources and nodes:

Edit

Use the Edit toolbar to format text and model shapes and to find text in your sources or nodes:

Links

Use the Links toolbar to work with 'See Also' links, annotations and memo links

Grid

Use the Grid toolbar to set display options for matrices or the project casebook:

Coding

Use the Coding toolbar to quickly perform common coding tasks such as coding at a new or existing node:

Media

Use the Media toolbar to run your audio and video files, control volume, select sections in the file, and transcribe while on play mode:

You can hover over a toolbar button to see a brief description of its use.
Status Bar

The status bar—the horizontal area at the bottom of the NVivo window—provides information about the current state of what you are viewing in the window and any other contextual information. For example, it shows the current user initials, number of items in a selected folder, the progress of document import or duration of an open audio/video source.

Customizing the Workspace

You can customize the NVivo menus, toolbars and views to suit the way you work. When you close your project, your customizations are saved. If you share NVivo with other users on the same computer, any customizations you make, will apply only to you.

Changing the Layout of Your Views

You can arrange views to suit your requirements. For example, when coding you can have a list of nodes and a document displayed vertically side-by-side.

Displaying views vertically
1. On the View menu, click Detail View.
2. Click the Right option.
   OR
   Click the Detail View Right or Detail View Bottom buttons on the View toolbar:

   ![View options]

When displayed vertically, the List View for nodes displays only the name column—the columns for Sources, References, Created and Modified are hidden.

Resizing views

Click and drag the splitter bar to increase or decrease the size of a view.

Hiding Navigation View

You can hide the Navigation View, and use the Go menu to navigate between sources, nodes and other project items.

To hide/show the Navigation View; on the View menu, click Navigation View.
Customizing the buttons on Navigation View

You can customize the Navigation View—for example, you can hide buttons or re-order buttons.

To change the Navigation View display:

1. Click the configure button at the bottom of the Navigation View.
2. Select the required display settings.

Undocking Detail View

You can undock Detail View to work with the contents in a separate window:

With an item open in Detail View, click the Window menu, then click the Docked option.
To re-dock a window, click the Docked option from the Window menu in the undocked window.
You can also choose to Dock or Undock All items opened in Detail View.

Adding, Removing and Reordering Columns in List View

Adding columns to the List View

When you are working with project items in List View, you can add columns to display more information. For example, if you have set up nicknames for your nodes, you may want to show the Nickname column. The available columns will vary depending on the project items currently displayed in the List View.

To add List View columns:

1. In Navigation View, click on the required project item folder—for example, the Internals or Tree Nodes folders.
   The project items are displayed in List View.
2. Click in the List View.
3. On the View menu, click List View.
4. Click Customize Current View.
   The Customize Current View dialog box is displayed
5. Under Available columns, select the column you want to add.
6. Click the >> (add) button.
7. Click the up or down arrow buttons to order the columns in the Selected columns list. This order corresponds to the order that the columns are displayed in the List View from left (up) to right (down).
8. Click OK.
Removing columns from the List View

You can remove columns from the List View to hide information. For example, if you are working alone on your project, you may want to remove the Created By and Modified By columns.

Some columns are required as identifiers for the project item and cannot be removed. For example, you cannot remove the Icon and Name columns. The columns required as identifiers vary depending on the type of project item—for example, relationships require the Direction column.

To remove List View columns:
1. In Navigation View, click on the required project item folder—for example, the Internals or Tree Nodes folders.
    The project items are displayed in List View.
2. Click in the List View.
3. On the View menu, click List View.
4. Click Customize Current View.
    The Customize Current View dialog box is displayed.
5. Under Selected columns, select the column you want to remove.
6. Click the << (remove) button.
7. Click OK.

Reordering columns in the List View

You can reorder columns in List View to suit the way you work—for example, if you are working in a team, you might prefer to show the Created By column to the left of the Created On column.

To reorder List View columns:
1. In Navigation View, click on the required item folder—for example, the Internals or Tree Nodes folders.
    The project items are displayed in List View.
2. Click in the List View.
3. On the View menu, click List View.
4. Click Customize Current View.
    The Customize Current View dialog box is displayed.
5. Under Selected columns, select the column you want to move to the left or right.
6. Click the up or down arrow buttons to order the column in the Selected columns list. This order corresponds to the order that columns are displayed in the List View from left (up) to right (down).
7. Click OK.

Resetting List View customizations

You can reset List View customizations back to 'factory settings'. You can choose to reset all List View customizations or only customizations for particular project items—for example, Internals or Tree nodes.

To reset List View customizations for specific project items:
1. In Navigation View, click the required project item folder—for example, the Internals or Tree Nodes folders.
    The project items are displayed in List View.
2. Click in the **List View**.
3. On the **View** menu, click **List View**.
4. Click **Customize Current View**.
   The **Customize Current View** dialog box is displayed.
5. Click the **Reset** button.
   The **Selected columns** are reset back to factory settings.
6. Click **OK**.

To reset all your **List View** customizations:
1. On the **Tools** menu, click **Reset Customizations**.
   The **Reset Customizations** dialog box is displayed.
   - By default, NVivo will reset all your customizations to toolbars, menus and **List Views**.
2. If you want to keep your toolbar and menu customizations, clear the **Toolbars and menus** check box.
3. Click **OK**.

If the **List View** is showing 'thumbnails', you must change it to show 'details' before you can add, remove or reorder columns. To change the display, click in the **List View**, and then select **View> List View> Details**

---

**Resizing and Sorting Columns**

**Resizing columns**

To resize columns in **List** or **Detail View**:

Click and drag the border to resize a column

**Sorting columns**

To sort the items in **List** or **Detail View**:

Click the required column header. For example, to sort items by their creation date, click the **Created** column header.

You can also sort items by clicking the **View** menu and clicking the **Sort By** option. Refer to **Sorting Sources** and **Sorting Nodes** for more information.

---

**Adjusting Headings for Tree Nodes in List View**

**Hiding child node column headings**

When working with tree nodes in the **List View** you can simplify the display by hiding the child node column headers. To hide the column headers:

On the **View** menu, click the **Child Node Headers** option.
Customizing Toolbars and Menus

**Customizing menus**

You can add, remove or rearrange options on your NVivo menus:

1. On the Tools menu, click Customize.
2. Click the Commands tab.
3. Click Rearrange Commands.
4. From the Menu Bar drop down list, select a menu to rearrange.
5. To customize the selected menu, use the Add, Delete, Move Up and Move Down buttons.
6. To apply the changes, click Close.
   OR
   To revert the selected menu back to its original configuration, click Reset.

**Adding and removing buttons from toolbars**

1. On the Tools menu, click Customize.
   The Customize dialog box is displayed.
2. In the Toolbars tab, select the toolbars you want to display.

   You cannot hide the Main Menu bar.

3. In the Commands tab, click Rearrange Commands.
4. Select Toolbar.
5. From the drop down list, choose a bar to rearrange.
6. To customize the selected toolbar, use the Add, Delete, Move Up and Move Down buttons.
7. To apply the changes, click Close.
   OR
   To revert the selected toolbar back to its original configuration, click Reset.
8. In the Options tab, set information about how menus are displayed.
9. To apply the changes, click Close.

**Adding toolbars**

You can also create a new toolbar to contain the commands you most frequently use:

1. On the Tools menu, click Customize.
   The Customize dialog box is displayed.
2. In the Toolbars tab, click New.
   The New Toolbar dialog box is displayed.
3. Enter a name for the new toolbar, select the location and click OK.
4. In the Commands tab, click on Rearrange Commands.
5. Select Toolbar.
6. From the drop down list, choose the new toolbar to rearrange.
7. To select and arrange commands for the new toolbar, use the Add, Delete, Move Up and Move Down buttons.
8. To apply the changes, click Close.
OR
To cancel the changes, click **Reset**.

**Moving toolbars**

Click and drag a toolbar handle to move the toolbar.

If you drag a toolbar to the edge of the **NVivo** window, it becomes a docked toolbar. When you move one docked toolbar, this might affect the location and size of other toolbars on the same row.

**Hiding toolbars**

To hide/show selected toolbars:
1. On the **View** menu, click **Toolbars**.
2. Click the toolbars you want to hide/show.

**Hiding the Find Bar**

To hide/show the **Find Bar**:
1. On the **Tools** menu, click **Find**.
2. Click the **Find** option.

**Resetting menu and toolbar customizations**

To reset your customizations to one or more toolbars:
1. On the **Tools** menu, click **Customize**.
   
The **Customize** dialog box is displayed.
2. On the **Toolbars** tab, click the toolbar you want to reset.
3. Click the **Reset** button.
   
The **Confirm Toolbar Reset** dialog box is displayed.
4. Click **OK**.

To reset all your customizations to **NVivo** menus and toolbars:
1. On the **Tools** menu, click **Reset Customizations**.
   
The **Reset Customizations** dialog box is displayed.

   **By default, **NVivo** will reset all your customizations to toolbars, menus and List Views.**

   2. If you want to keep your **List View** customizations, you must clear the **List views** check box.
   3. Click **OK**.

If you remove the **Tools** menu (or the **Reset Customizations** option on it) you can still reset by right-clicking in the toolbar area and selecting the **Customize** option.

If you rearrange menus and toolbars, related Help content may no longer be applicable.
Customizing the Model Workspace

Hiding the Shapes palette

To hide the shapes palette while you are working in a model:
1. Click the View menu.
2. Click the Models Shapes Palette option.

Hiding the Groups panels

To hide the Groups panels that are displayed on the right of Detail View:
- On the View menu, click Model Groups.
- To display a specific panel click:
  - Custom Groups
  - Project Groups

Viewing Thumbnails in List View

You can view sources as thumbnail pictures in List View—this is especially useful when you are working with pictures and videos.

To display thumbnails:
1. Click the Sources button in Navigation View.
2. Click the required source folder.
3. Click in the List View.
4. On the View menu, click List View.
5. Select the required thumbnail options.

For video sources, you can assign a specific frame to be viewed or displayed as a thumbnail in List View:
1. Open the video source in Detail View.
2. In the timeline, drag the playhead to the desired frame.
3. In the Media menu, click Assign Frame as Thumbnail.

Setting Application Options

You can set application-wide options that apply to all new projects you create in NVivo and project items which have not yet been opened in the current project you are working on. Application options are 'user specific'—your options may differ from those set by another NVivo user on the same computer.

To set application options:
1. On the Tools menu, click Options.
   - The Application Options dialog box is displayed.
2. You can set a range of options on the General tab.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>The <strong>Name</strong> and <strong>Initials</strong> of the current user are displayed. You can change the current user by updating these details.</td>
</tr>
<tr>
<td></td>
<td>If you enter a name that is not currently defined for the project, a new user profile is created.</td>
</tr>
<tr>
<td></td>
<td>The initials of the current user are displayed in the <strong>NVivo</strong> status bar.</td>
</tr>
<tr>
<td></td>
<td>To change the initials being used for a currently opened project, refer to <strong>Changing User Initials</strong>.</td>
</tr>
<tr>
<td>Prompt for user on launch</td>
<td>Check this option to prompt users to provide their user name and initials every time they launch <strong>NVivo</strong>. The user name defaults to the Windows user name, but users can change this if required. User initials must be entered.</td>
</tr>
<tr>
<td></td>
<td>This is useful if multiple researchers will be accessing <strong>NVivo</strong> using the same computer and Windows login.</td>
</tr>
<tr>
<td></td>
<td>Refer to <strong>Working in Teams</strong> for more information.</td>
</tr>
<tr>
<td>Optimized for project size</td>
<td>If you are working with a large project (over 500 sources), you can optimize <strong>NVivo</strong>'s performance by selecting the <strong>Large</strong> option from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>Experiment with this setting to achieve the best performance for your project size and computer capacity.</td>
</tr>
<tr>
<td>Display plain text for nodes with &lt;0&gt; or more sources</td>
<td>By default, nodes are displayed in rich text format. Depending on the speed of your computer, you may experience poor performance when working with nodes that code many sources. To counteract this, you can have large nodes automatically displayed in plain text.</td>
</tr>
<tr>
<td></td>
<td>Click the check box to enable plain text display, then set the number of sources.</td>
</tr>
<tr>
<td>User interface</td>
<td>The user interface language is the language used in all menus and dialogs within <strong>NVivo</strong>.</td>
</tr>
<tr>
<td></td>
<td>If your license provides more than one user interface language, you will have a choice of languages in this drop-down list.</td>
</tr>
<tr>
<td></td>
<td>If you select a user interface language other than English, you must ensure that the language is installed on your computer. Refer to Microsoft Windows online help for more information.</td>
</tr>
<tr>
<td>Text search index</td>
<td>To ensure efficient performance of text searches, choose the appropriate language from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>Note: Stemmed text searches are not available for languages other than English—refer to <strong>Text Search Queries</strong> for more information on stemmed text searches.</td>
</tr>
<tr>
<td>Code whole words</td>
<td>When selecting text for coding you may (inadvertently) select part of a word. For example, &quot;ick brown fox&quot; instead of &quot;quick brown fox&quot;. If this option is enabled, <strong>NVivo</strong> will automatically code the whole word <strong>quick</strong>.</td>
</tr>
</tbody>
</table>
Click this button to set the Narrow default when spreading coding, viewing the coding context or running queries. Refer to Spread Coding to the Context or Viewing the Coding Context for more information.

Click this button to set the Broad default when spreading coding, viewing the coding context or running queries. Refer to Spread Coding to the Context or Viewing the Coding Context for more information.

Select this option to enable access to the online version of the Help. Make sure you are connected to the Internet before you launch the NVivo program.

If you were not connected to the Internet when you launched NVivo, clicking the Help will open the offline version installed with your software.

Select this option to only access the offline version of the Help whether you are connected to the Internet or not.

Click this button to remove projects from My Recent Projects list on the NVivo Welcome screen.

### 3. To set options about messages and updates, click the Notifications tab

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable project save reminders every ( ) minutes</td>
<td>It is important to regularly save your work. NVivo can remind you to save at appropriate intervals. Click the check box and enter an interval.</td>
</tr>
<tr>
<td>Enable deletion confirmation messages</td>
<td>When you delete items in NVivo, a message is displayed prompting you to confirm your decision. You can clear the check box to disable confirmation messages.</td>
</tr>
<tr>
<td>Check for software updates</td>
<td>Software updates can include enhancements, additional user interface languages or fixes for known issues. By default, NVivo checks for software updates every 7 days. If you do not want NVivo to check for software updates automatically, set this option to Never. For more information on software updates, refer to Managing Your NVivo Software.</td>
</tr>
</tbody>
</table>
4. To set options about how information is displayed, click the Display tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window</td>
<td>By default, Detail View is ‘docked’ to the NVivo workspace. If you prefer to work with free-floating windows, you can change the default to ‘Floating’.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Detail View" /></td>
</tr>
<tr>
<td></td>
<td>Refer to Customizing the Workspace for more information about docking and undocking Detail View.</td>
</tr>
<tr>
<td>Node display</td>
<td>When you open a node in Detail View—the Reference tab is displayed by default. It contains all the references coded at the node. References to audio or video are represented as a timespan and references to pictures are represented by the pixel range. You can change this default to Summary View by selecting from the drop-down list. This view provides a list of all the sources coded at the node.</td>
</tr>
<tr>
<td></td>
<td>Refer to Opening and Viewing Nodes for more information.</td>
</tr>
<tr>
<td>Highlight Coding</td>
<td>By default, coded content in a source or node is not highlighted. You can change this default by choosing All Nodes from the drop-down list—then, when you open a source or node, all coded content is automatically highlighted. Refer to Highlight Coding for more information.</td>
</tr>
<tr>
<td>Node user view</td>
<td>By default, when you open a node, the coding done by all users is displayed. You can change this default to display only the coding for the current user. Refer to Filtering Nodes by User for more information.</td>
</tr>
<tr>
<td>Annotations tab</td>
<td>By default, when you open a source or node the Annotations tab is not automatically displayed. Select this check box to change this default and display annotations automatically.</td>
</tr>
<tr>
<td>Relationships tab</td>
<td>By default, when you open a source or node the Relationships tab is not automatically displayed. Select this check box to change the default and display relationships automatically.</td>
</tr>
<tr>
<td>See also links tab</td>
<td>By default, when you open a source or node the See Also Links tab is not automatically displayed. Select this check box to change the default and display See Also Links automatically.</td>
</tr>
</tbody>
</table>
### Media waveforms

By default, when you open an audio or video source the media waveform is automatically displayed behind the timeline.

![Waveform Example]

The waveform can be a useful way to visualize sound patterns in a media file. Clear the check box if you want to hide the waveform.

The new setting is not applied to currently opened sources, but will be applied to newly opened and imported sources. To hide the waveform in a currently open source, on the **View** menu click **Waveform**.

### Coding Stripes

If you work with coding stripes displayed, you can set a default for the stripes that should be visible—this saves you from having to set the stripes for each source or node that you open.

Select the required option from the drop-down list.

Refer to [Displaying Coding Stripes](#) for more information.

### Maximum number of stripes

You can change the default for the number of coding stripes that are displayed when you choose the *most*, *least* and *recently* and *last selected* options.

You can display up to 200 coding stripes—resize the coding stripe panel and use the horizontal scroll bar to see the coding stripes.

Experiment with this setting to achieve the best performance for your project size and computer capacity.

### Text date format

When working with sources, you can insert the current date and time. To specify the format for the date and time, select it from the drop-down list.

- **Local Format** is universal time converted to your local time zone.
- **Universal Format** is the reference time zone from which all other time zones around the world are calculated. It is the successor of Greenwich Mean Time (GMT), and is still colloquially called GMT.

### Default Model layout

Select the required default layout for models:

- Circular
- Directed
- Hierarchical (tree structure)
- Orthogonal

You can change the default layout while working in a model. Refer to [Laying Out Models](#) for more information about each layout type.
Minimum connector length  Specify the default minimum length for connectors in a model.

5. To define labels for attribute values and relationship types, click the [Labels tab](#).

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Unassigned&quot; attribute value label</td>
<td>If you want to use another term for the attribute value 'unassigned' (such as 'blank' or the equivalent in another language) you can enter it in this field. The term must be unique among attribute values. See also <a href="#">Adding Attributes and Values</a>.</td>
</tr>
<tr>
<td>&quot;Not Applicable&quot; attribute value label</td>
<td>If you want to use another term for the attribute value 'not applicable' (such as 'irrelevant' or the equivalent in another language) you can enter it in this field. The term must be unique among attribute values.</td>
</tr>
<tr>
<td>&quot;Associated&quot; relationship type label</td>
<td><a href="#">NVivo</a> provides a default relationship type. It is non-directional and is labeled Associated. Although you cannot change the direction of this default relationship type, you can enter a new label (for example, 'Related' or the equivalent in another language). You can set another relationship type as the default by selecting it, clicking the <a href="#">Project</a> menu and choosing the Default Relationship Type option. See also <a href="#">About Relationships</a>.</td>
</tr>
</tbody>
</table>

6. To define the default locations for your [NVivo](#) files, click the [File Locations tab](#).

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default location of projects</td>
<td>By default, projects are saved to your My Documents folder. If you are running Windows Vista, projects are stored in the Users&lt;username&gt;\Documents folder. Click the <a href="#">Browse</a> button to define a new default location for saved projects.</td>
</tr>
<tr>
<td>Default location of externals</td>
<td>You can specify the default location for the files that are linked to externals (such as images, sound or video files). Click the <a href="#">Browse</a> button to define a default location for these files.</td>
</tr>
<tr>
<td>Default location to import</td>
<td>Click the <a href="#">Browse</a> button to define a default location for items that you import. For example, if the sources you import are in a specific file folder, you can specify it as the default.</td>
</tr>
</tbody>
</table>
Default location to export

Click the **Browse** button to define a default location for exported items. For example, if the items you export (nodes, casebook and so on) are to be stored in a specific file folder, you can specify it as the default.

---

7. To define paragraph styles used to format text, click the **Paragraph Styles** tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Font</td>
<td>Select a style and choose the required font from the drop-down list. You can choose from the fonts that are available on your computer.</td>
</tr>
<tr>
<td>Size</td>
<td>Select a style from the list and select the required point size.</td>
</tr>
<tr>
<td>Color</td>
<td>Select a style and choose a color from the drop-down list.</td>
</tr>
<tr>
<td>Bold</td>
<td>Check the box to make a selected style <strong>bold</strong>.</td>
</tr>
<tr>
<td>Italic</td>
<td>Check the box to make the selected style <strong>italic</strong>.</td>
</tr>
<tr>
<td>Underline</td>
<td>Check the box to make the selected style <strong>underlined</strong>.</td>
</tr>
<tr>
<td>Reset Style</td>
<td>Click this button to return the selected system style to the default settings.</td>
</tr>
<tr>
<td>Reset System Styles</td>
<td>Click this button to return all system styles to the default settings.</td>
</tr>
<tr>
<td>New Style</td>
<td>Click this button to create a new style. Enter a name for the style and select the settings.</td>
</tr>
<tr>
<td>Remove Style</td>
<td>Click this button to delete a selected style.</td>
</tr>
</tbody>
</table>

Any changes you make to paragraph styles will be available for **new** projects but are not applied to existing projects. Refer to **Defining Paragraph Styles** for more information.

---

8. To define the default style or create new styles for items in a model, click the **Model Styles** tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Style</td>
<td>Click to add a new style. When you create a new model style at this application level, it is available for all <strong>new</strong> projects.</td>
</tr>
<tr>
<td>Remove</td>
<td>Click to remove a selected style. You cannot remove the <strong>Default</strong> style.</td>
</tr>
<tr>
<td>-------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Name</td>
<td>Enter a name for a new style. You cannot change the name of the <strong>Default</strong> style.</td>
</tr>
<tr>
<td>Text</td>
<td><strong>These options apply to the text that appears in model shapes and with connector lines.</strong></td>
</tr>
</tbody>
</table>
| Font        | Select a style and choose the required font from the drop-down list.  
|             | You can choose from the fonts that are available on your computer. |
| Size        | Select a style and enter the required point size or select it from the drop-down list. |
| Color       | Select a style and choose the required color from the drop-down list. |
| Bold        | Select a style and click the **Bold** check box to make the text **bold**. |
| Italic      | Select a style and click the **Italic** check box to make the text **italic**. |
| Underline   | Select a style and click the **Underline** check box to **underline** the text. |
| Line        | **These options apply to shape borders and connectors.** |
| Style       | Select a style and choose the line type from the drop-down list. |
| Weight      | Select a style and choose a weight from the drop-down. **Weight** refers to the thickness of a line. |
| Color       | Select a style and choose a color from the drop-down list. |
| Fill        | **This option applies to the background color of shapes.** |
| Color       | Select a style and choose a color from the drop-down list. |
| Reset Style | Click this button to return the default formats back to the **NVivo** factory settings. This button is only available for the **Default** style. |
When you add or edit styles, the changes are available for new projects—they are not available in the currently open project.

For more information about model styles refer to Applying Styles to Shapes and Connectors.

9. To change media file settings and customize transcript fields, click the Audio/Video tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Embed media in project if file size less than ( )MB</td>
<td>By default, this box is checked and the maximum file size indicated is 20 MB. This means any media files you import will become part of the project file automatically, as long as the file size is less than 20 MB. The maximum size allowed for embedding is 40MB. Clear the box if you do not want to embed audio or video files within the project.</td>
</tr>
<tr>
<td>Player skip interval</td>
<td>You can change the number of seconds the media player skips when you select Skip Back or Skip Forward. By default the skip interval is set to 5 seconds.</td>
</tr>
<tr>
<td>Skip back on play in transcribe mode</td>
<td>If you select this option, the media player skips back (by the Player skip interval) when you play after pausing in transcribe mode.</td>
</tr>
<tr>
<td>Audio tab</td>
<td>Click the New button to add a custom column to the transcript template for audio files. Refer to Adding Custom Columns to Transcripts for more information. You can change the placement of the new column by using the Move Up and Move Down buttons. To remove the custom column, click Remove.</td>
</tr>
<tr>
<td>Video tab</td>
<td>Click the New button to add a custom column to the transcript template for video files. Refer to Adding Custom Columns for Transcripts for more information. You can change the placement of the new column by using the Move Up and Move Down buttons. To remove the custom column, click Remove.</td>
</tr>
</tbody>
</table>

Except for 'Player skip interval' and 'Skip back on play in transcribe mode', the changes to these options will affect new projects only and are not applied to existing or currently opened projects. To change audio and video options in existing projects, refer to Setting Project Properties.

10. Click Apply to save the changes made in a tab.

11. Click OK when you have finished defining application options.
Printing Project Items

To print a selected project item:

1. Click on the item in List View. Click and drag to select multiple consecutive items or hold down the CTRL key to select non-consecutive items.
   OR
   Click in the item in Detail View. To print the coding stripes for a source or node, open the item and display the required stripes.

2. On the File menu, click Print.
   OR
   If the item is open in Detail View, you can click Print Preview to preview the pages before you print.

3. Select the required options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td><strong>Reference View</strong> prints the contents of the node. <strong>Summary View</strong> prints a list of all the sources coded in the node including folder location, number of references and coverage. This option is only available when you are printing nodes.</td>
</tr>
<tr>
<td>Name</td>
<td>Include the item name on the print out.</td>
</tr>
<tr>
<td>Format</td>
<td>If you choose to include names, you can select the required format.</td>
</tr>
<tr>
<td>Description</td>
<td>Include the description that is defined in the item's properties.</td>
</tr>
<tr>
<td>Other Properties</td>
<td>Include other item properties—for example, the date that the project item was created. This option is only available for sources, and the properties vary depending on the type of source you are printing.</td>
</tr>
<tr>
<td>Annotations</td>
<td>Annotated text is highlighted and numbered. The text of the annotation is displayed under Annotations at the end of the print out.</td>
</tr>
<tr>
<td>See Also Links</td>
<td>'See Also' links are identified by superscript roman numerals (I) and the destination of the link is displayed under See Also Links at the end of the print out.</td>
</tr>
<tr>
<td>Relationships</td>
<td>Relationships to other project items are displayed under Relationships at the end of the print out.</td>
</tr>
<tr>
<td>Memo Links</td>
<td>Memo links are displayed at the end of the print out. If you are printing a source or node, the linked memo is listed under the heading Linked Memo. If you are printing a memo, the linked source or node is listed under the heading Linked Item.</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Paragraph numbers</td>
<td>Display a number next to each paragraph. This option is only available for documents, memos and externals.</td>
</tr>
<tr>
<td>Coding stripes</td>
<td>Include coding stripes for the item. This option is only available when you print from Detail View. You must also display coding stripes to enable the option. Refer to Printing Coding Stripes for more information.</td>
</tr>
</tbody>
</table>

4. Click **OK**.

→ **A Quick Way To Do This**

**Print toolbar button:**

1. Select the required item in **List View**.
2. Click the Print button on the main toolbar:

   ![Print toolbar button](image)

**Right-click:**

1. Right-click the required item in **List View**.
2. Click the Print <Item> option.

When you print an audio or video source, the media file is represented by the timeline.

### Printing Lists of Items

To print a list of the items displayed in **List View**:

1. Click in **List View**.

   OR

   Click in **Detail View**, when there are lists of items displayed (query results or node summaries).

2. On the **File** menu, click **Print List**.

   OR

   Click **Print Preview** to preview the pages before you print.
Page Setup Options

If you are printing documents, memos, externals, nodes or models, you can set the paper size, page orientation and margins.
1. Open the item you want to print in **Detail View**.
2. On the **File** menu, click **Page Setup**.
   The **Page Setup** dialog box is displayed.
3. Click the required settings.
4. Click **OK**.

Exporting Items

You can export project items to work with them in other applications such as Microsoft Word or Excel. You can also export your sources and nodes to HTML, so you can open them in your web browser. This can be useful if you want to share project items with someone who does not have NVivo.

You can set a default location for exported items—refer to the **File Locations** tab in **Setting Application Options** for more information.

To export various project items, view the following topics:

Exporting Sources
- **Exporting documents, memos and externals**
- **Exporting audio and video sources**
- **Exporting picture sources**

Exporting Nodes
- **Exporting nodes (free nodes, tree nodes, cases and relationships)**
- **Exporting matrices**
- **Exporting the casebook**

Exporting Reports, Models and Query Results
- **Exporting reports**
- **Exporting models**
- **Exporting query results**
Exporting Lists

You can export a list of items as displayed in List View. This can also be exported as a Microsoft Excel spreadsheet (.xls) or as a document (.txt, .doc, .docx, .rtf or .pdf).

To export a list of items:
1. In the List View, expand/collapse the folders containing the items you want to export.
2. On the Project menu, click Export List.
   The Save As dialog box is displayed.
3. In the Save in drop-down list, select the destination for the exported file.
4. In the File name field, enter a name for the exported file.
5. In the Save as type drop-down list, select the format for the exported file.
6. Click Save.

Undoing Your Last Action

If you make a mistake while working in NVivo, you can undo your most recent actions. Undo is also useful when you want to try an action without keeping the results.

To undo an action:
1. From the Edit menu, click Undo <last action>. Click the option again to undo the previous action; you can do this up to five times.
   OR
2. On the Main toolbar, click the Undo button:

   ![Undo button](image.png)

Displaying a List of Actions You Can Undo

1. On the Main toolbar, click the arrow next to Undo.
2. A list of your most recent actions is displayed.
3. Click the action you want to undo.
   When you undo an action, you also undo all actions above it in the list.

When you save a project, the undo list is cleared and you cannot undo updates that were made prior to the save.

Shortcut Keys

You can quickly accomplish tasks by using shortcut keys—one or more keys you press on the keyboard to complete a task.

For example, press CTRL+O to open a project in NVivo.
Using Menu Shortcuts

Each **NVivo** menu name has an underlined letter. You can open any menu using ALT+ (underlined letter). For example, to open the **File** menu press ALT+F.

Each option on a menu also has an underlined letter. Once a menu is open, you can select an option using the CTRL+ (underlined letter). For example, to select the **Close Project** option from the **File** menu, press CTRL+C.

You can also customize shortcuts to suit the way you want to work.

To customize shortcuts:
1. On the **Tools** menu click **Customize**.
   The **Customize** dialog box is displayed.
2. Click the **Commands** tab
3. Click the **Keyboard** button.
4. Edit the required shortcuts.

Using Other Shortcuts

**Shortcuts for frequently used functions**

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL+A</td>
<td>Select all—for example, all items in a list, all text in a source, or an entire image.</td>
</tr>
<tr>
<td>CTRL+C</td>
<td>Copy selected project content.</td>
</tr>
<tr>
<td>CTRL+F</td>
<td>Find text in a source or node.</td>
</tr>
<tr>
<td>CTRL+G</td>
<td>Go to specified heading level, paragraph, 'See Also' link or annotation—in a source or a node.</td>
</tr>
<tr>
<td>CTRL+H</td>
<td>Replace text in a source.</td>
</tr>
<tr>
<td>CTRL+N</td>
<td>Create a new project.</td>
</tr>
<tr>
<td>CTRL+O</td>
<td>Open an existing project.</td>
</tr>
<tr>
<td>CTRL+P</td>
<td>Print selected item.</td>
</tr>
<tr>
<td>CTRL+S</td>
<td>Save the project.</td>
</tr>
<tr>
<td>CTRL+V</td>
<td>Paste selected project content.</td>
</tr>
<tr>
<td>CTRL+X</td>
<td>Cut selected project content.</td>
</tr>
<tr>
<td>CTRL+Z</td>
<td>Undo previous action (up to five levels).</td>
</tr>
<tr>
<td>CTRL+SHIFT+C</td>
<td>Open the casebook for the project.</td>
</tr>
<tr>
<td>Shortcut</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CTRL+SHIFT+I</td>
<td>Import a new Internal source (document, audio, video or picture).</td>
</tr>
<tr>
<td>CTRL+1</td>
<td>Open <strong>Sources</strong> group in <strong>Navigation View</strong>.</td>
</tr>
<tr>
<td>CTRL+2</td>
<td>Open <strong>Nodes</strong> group in <strong>Navigation View</strong>.</td>
</tr>
<tr>
<td>CTRL+3</td>
<td>Open <strong>Sets</strong> group in <strong>Navigation View</strong>.</td>
</tr>
<tr>
<td>CTRL+4</td>
<td>Open <strong>Queries</strong> group in <strong>Navigation View</strong>.</td>
</tr>
<tr>
<td>CTRL+5</td>
<td>Open <strong>Models</strong> group in <strong>Navigation View</strong>.</td>
</tr>
<tr>
<td>CTRL+6</td>
<td>Open <strong>Links</strong> group in <strong>Navigation View</strong>.</td>
</tr>
<tr>
<td>CTRL+7</td>
<td>Open <strong>Classifications</strong> folder in <strong>Navigation View</strong>.</td>
</tr>
<tr>
<td>CTRL+8</td>
<td>Show all folders in <strong>Navigation View</strong>.</td>
</tr>
<tr>
<td>CTRL+ENTER</td>
<td>Insert a page break within a document, external or memo.</td>
</tr>
<tr>
<td>F1</td>
<td>Open online help.</td>
</tr>
<tr>
<td>F5</td>
<td>Refresh.</td>
</tr>
<tr>
<td>ALT+F1</td>
<td>Show or hide <strong>Navigation View</strong>.</td>
</tr>
</tbody>
</table>

**Shortcuts for selecting text**

Many of the shortcut keys used in Microsoft Word are also available in **NVivo**.

**Selecting text using a mouse:**

<table>
<thead>
<tr>
<th>To Select...</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any amount of text</td>
<td>Drag over the text.</td>
</tr>
<tr>
<td>A word</td>
<td>Double-click the word.</td>
</tr>
<tr>
<td>A paragraph</td>
<td>Triple-click anywhere in the paragraph.</td>
</tr>
<tr>
<td>A large block of text</td>
<td>Click at the start of the selection, scroll to the end of the selection, and then hold down SHIFT and click.</td>
</tr>
</tbody>
</table>
Selecting content using your keyboard:

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extending or decreasing a selection by one or more characters</td>
<td>Hold down SHIFT and then press the RIGHT or LEFT arrow to extend or decrease your selection by one or more characters.</td>
</tr>
<tr>
<td>Selecting a single line of text</td>
<td>Click anywhere in the line. Press HOME to move to the start of the line. Then hold down SHIFT+END.</td>
</tr>
<tr>
<td>Selecting multiple lines of text</td>
<td>Select the first line using the shortcut 'Selecting a single line of text'. Then hold down SHIFT and use the DOWN and UP arrows to extend the selection to one or more lines immediately below or above.</td>
</tr>
<tr>
<td>Extending a selection to the beginning of a paragraph</td>
<td>CTRL+SHIFT+UP ARROW</td>
</tr>
<tr>
<td>Extending a selection to the end of a paragraph</td>
<td>CTRL+SHIFT+DOWN ARROW</td>
</tr>
<tr>
<td>Extending a selection to the beginning of a source or node</td>
<td>CTRL+SHIFT+HOME</td>
</tr>
<tr>
<td>Extending a selection to the end of a source or node</td>
<td>CTRL+SHIFT+END</td>
</tr>
<tr>
<td>Selecting an entire source or node</td>
<td>Click CTRL+HOME to move to the start of the document, then press CTRL+SHIFT+END.</td>
</tr>
</tbody>
</table>

Shortcuts for playing and transcribing audio and video sources

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F7</td>
<td>Play / Pause</td>
</tr>
<tr>
<td>F8</td>
<td>Stop</td>
</tr>
<tr>
<td>F9</td>
<td>Skip back</td>
</tr>
<tr>
<td>F10</td>
<td>Skip forward</td>
</tr>
</tbody>
</table>
F11 Start selection

F12 Finish selection

Find

Finding Text

While you are working with a source or node in Detail View, you can search for specific text. If you want to search for specific text in multiple sources, refer to Text Search Queries.

When working with sources and nodes you can search for all occurrences of:

A word or phrase

1. In Detail View, place the cursor in a source or node.
2. On the Edit menu, click Find.
   The Find Content dialog box is displayed.
3. In the Text drop-down list, enter the text you want to search for. If required, you can select previous search text from the list. Click the Special button to search for special characters

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>^p</td>
<td>Paragraph Mark</td>
</tr>
<tr>
<td>^t</td>
<td>Tab Character</td>
</tr>
<tr>
<td>^?</td>
<td>Any Character</td>
</tr>
<tr>
<td>^#</td>
<td>Any Digit</td>
</tr>
<tr>
<td>^$</td>
<td>Any Letter</td>
</tr>
<tr>
<td>^^</td>
<td>Caret Character</td>
</tr>
<tr>
<td>^i</td>
<td>Ellipsis Character</td>
</tr>
<tr>
<td>^w</td>
<td>White Space</td>
</tr>
</tbody>
</table>

4. From the Look in drop-down list, select an option

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Search for text in the content only.</td>
</tr>
</tbody>
</table>
Annotations | Search for text in annotations only.
---|---
Text and Annotations | Search for text in the content and associated annotations.

5. From the **Search** drop-down list, select the required search direction.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Down</td>
<td>To search from the cursor to the end of the text.</td>
</tr>
<tr>
<td>Up</td>
<td>To search from the cursor to the beginning of the text.</td>
</tr>
<tr>
<td>All</td>
<td>To search all of the text.</td>
</tr>
</tbody>
</table>

6. Click the **Match case** checkbox to find the exact combination of upper and lower case letters.

7. Click the **Find whole word** checkbox if you want to find only the occurrences of the complete word that you entered in the **Find** field. For example, if you search for *stick* the words *tick* and *sticky* will not be found.

8. Click **Find Next**.

**A word or phrase in a specific heading style**

1. Place the cursor in **Detail View**.
2. On the **Edit** menu, click **Find**. The **Find Content** dialog box is displayed.
3. In the **Text** drop-down list, enter the required text. If required, you can select previous search text from the list. Click the **Special** button to search for special characters such as paragraph marks or white space.
4. In the **Style** drop-down list, click the required text style.
5. Select **Text** from the **Look in** drop-down list. Styles cannot be applied to annotations.
6. From the **Search** drop-down list, select the required search direction.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Down</td>
<td>To search from the cursor to the end of the text.</td>
</tr>
<tr>
<td>Up</td>
<td>To search from the cursor to the beginning of the text.</td>
</tr>
<tr>
<td>All</td>
<td>To search all of the text.</td>
</tr>
</tbody>
</table>

7. Click the **Match case** checkbox to find the exact combination of upper and lower case letters.
8. Click the Find whole word checkbox if you want to find only the occurrences of the complete word that you entered in the Find field. For example, if you search for stick the words tick and sticky will not be found.

9. Click Find Next.

Finding and Replacing Text in a Source

When working with a source you can find and replace text and styles (or any combination of these)—for example, you can replace

- 'Acme' with 'Apex'
- 'Strategy' with 'Strategy' (same text to new style)
- 'Scope' with 'Goal' (new text and new style)
- All text in heading 1 style to heading 3 style

You cannot replace text or styles in a node.

To find and replace text in a source:

1. Place the cursor in Detail View.
2. On the Edit menu, click Replace.
3. The Replace Content dialog box is displayed.
4. In the Find What panel, enter the text and style you want to find. If the style is irrelevant, click Any. To find all occurrences of a selected style (regardless of text), leave the Text field blank.
5. In the Replace With panel, enter the replacement text and style. To keep the existing style, select the Same option.
6. From the Look in drop-down list, select an option:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Search for text in the content only.</td>
</tr>
<tr>
<td>Annotations</td>
<td>Search for text in annotations only.</td>
</tr>
<tr>
<td>Text and Annotations</td>
<td>Search for text in the content and associated annotations.</td>
</tr>
</tbody>
</table>
7. From the **Search** drop-down list, select the required search direction:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Down</td>
<td>To search from the cursor to the end of the text.</td>
</tr>
<tr>
<td>Up</td>
<td>To search from the cursor to the beginning of the text.</td>
</tr>
<tr>
<td>All</td>
<td>To search all of the text.</td>
</tr>
</tbody>
</table>

8. Click the **Match case** checkbox to find the exact combination of upper and lower case letters.

9. Click the **Find whole word** checkbox if you want to find only the occurrences of the complete word that you entered in the **Find** field. For example, if you search for *stick* the words *tick* and *sticky* will not be found.

10. Click **Find Next** button to find the next occurrence of the text and/or style.

11. Click the **Replace** button to replace the existing text and/or style.

12. To change all occurrences of the search text to the replacement text, click **Replace All**.

Finding Project Items by Name

You can find project items based on their name or characters contained in their name. For example, you could find all the sources, nodes and sets that have *North* somewhere in their name.

To find project items by name:

1. Ensure the **Find Bar** is visible at the top of **List View**. To show the **Find Bar**, select **Find** on the **Tools** menu and then click the **Find** option.

2. In the **Find Bar**, enter the item name (or any part of the name) in the **Look for** field. The name can include wildcards.

   A wildcard character is a keyboard character such as an asterisk (*) or a question mark (?) that is used to replace one or more characters when you are searching for project items such as sources, nodes or sets.

<table>
<thead>
<tr>
<th>Wildcard</th>
<th>Description</th>
</tr>
</thead>
</table>
| Asterisk (*) | Use the asterisk as a substitute for zero or more characters.  
For example: *g*t will find names that contain **get**, **great** and **gt** |
| Question mark (?) | Use the question mark as a substitute for a single character in a name.  
For example: ?g*t will find names that contain **get** and **gate** but not **great** or **grunt** |

3. From the **Search In** drop-down list, select the folder you want to search.

4. Click the **Find Now** button.
Items matching the criteria are displayed in **List View**. From here, you can open items, add items to a set, print items, copy items to a model and so on.

**Using Advanced Find**

You can also use **Advanced Find** to locate project items by name (combined with other criteria if required):

1. On the **Tools** menu, click **Find**.
2. Click the **Advanced Find** option.
   
   The **Advanced Find** dialog box is displayed.
3. Click the **Advanced** tab.
4. From the **Look for** drop-down list (at the top of the dialog), click the required item type.
5. From the **Interaction** drop-down list, click **Name**.
6. From the **Option** drop-down list, click **Is Exactly** if you know the exact name—or **Contains** if you know part of it.
7. Enter the name or part of the name in the **Value** field.
8. Click the **Add to List** button.
9. Click the **Find Now** button.

Items matching the criteria are displayed in **List View**. From here, you can open items, add items to a set, print items, copy items to a model and so on.

---

**A Quick Way To Do This**

**Find Bar:**

1. On the **Find Bar**, click the **Options** button.
2. Click the **Advanced Find** option.
3. Click the **Advanced** tab.

**Using Advanced Find: Intermediate**

You can use the **Advanced Find** feature in **NVivo** to gather a list of project items based on specific criteria. For example, you can find:

- Nodes that were created *last week*.
- Cases with the attribute value *male*.
- Memos that have a 'See Also' link to the node *adventure*.
- Documents that are coded at the node *passionate*.
- Nodes that code the document *Volunteers Group 1*.
- Sets that contain cases.
- Audio/Video files that have a relationship with a case.

To gather project items based on specific criteria:

1. In the **Tools** menu, click **Find**.
2. Click the **Advanced Find** option.

   The **Advanced Find** dialog box is displayed.
3. From the Look for drop-down list, select the type of project item you want to find—this selection determines the search options that are available.

4. Select the required options:

The options you can see in the Intermediate tab depend on the item type you selected from the Look for drop-down list. This table describes all possible options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Created** | To find items created in a specified time frame, select the time frame from the drop-down list. Then, specify which users to find in the by field:  
  - Any Users—will find items created by any users identified in the open project  
  - Current User—will find items created by the current user named in the open project  
  - Selected Users—will find items created by specific users. Clicking on the Select button will display the Select Project Item dialog box to enable you to choose the required users. |
| **Modified** | To find items that have been modified in a specified time frame, select the time frame from the drop-down list. Then, specify which users to find in the by field:  
  - Any Users—will find items modified by any users identified in the open project  
  - Current User—will find items modified by the current user named in the open project  
  - Selected Users—will find items modified by specific users. Clicking on the Select button will display the Select Project Item dialog box to enable you to choose the required users. |
| **In** | To find items that are included in a set, click the checkbox and choose Any Set from the drop-down list. To find items that are included in a specific set (or sets),  
  1. Choose Selected Set(s) from the drop-down list.  
  2. Click the Select button. The Select Sets dialog box is displayed.  
  3. Click the check box for the required set.  
  4. Click OK. |
With See Also Link

Click the checkbox to find items with a 'See Also' link from or to project items.

To find items with a 'See Also' link from or to any item, select **From** or **To** and **Any Item** from the drop-down lists.

To find items with a 'See Also' link from or to selected items:

1. Select **From** or **To** and **Selected Item(s)** from the drop-down lists.
2. The **Select Project Items** dialog box is displayed.
3. On the left, click the folder that contains the required items. Click the folder check box to include all items in the folder— to include all items in subfolders click the **Automatically select subfolders** option.
4. Check the boxes for the required items.
5. Click **OK**.

Coded at

Click the checkbox to find items that are coded at nodes.

To find items that are coded at any node, select **Any Item** from the drop-down list.

To find items that are coded at selected nodes:

1. Choose **Selected Item(s)** from the drop-down list.
2. The **Select Project Items** dialog box is displayed.
3. On the left, click the folder that contains the required nodes. Click the folder check box to include all items in the folder— to include all items in subfolders click the **Automatically select subfolders** option.
4. On the right, check the boxes for the nodes you want to include. To select all nodes under a parent node, click the **Automatically select hierarchy** checkbox.
5. Click **OK**.

Then, specify which users to find in the **by** field:

- **Any Users**—will find items coded by any users identified in the open project
- **Current User**—will find items coded by the current user named in the open project
That code

Click the checkbox to find nodes that code project items:
To find nodes that code any item, select Any Item from the drop-down list.
To find nodes that code selected project items:
1. Choose Selected Item(s) from the drop-down list.
   The Select Project Items dialog box is displayed.
2. Click the folder that contains the required sources or nodes. Click the folder check box to include all items in the folder—to include all items in subfolders click the Automatically select subfolders option.
3. Check the boxes for the items you want to include. To select all nodes under a parent node, click the Automatically select hierarchy checkbox.
4. Click OK.

With a

Click the checkbox to find items that have a relationship with another project item. You can find items that have:
- (any) relationship with other items
- a relationship from other items
- a relationship to other items
- a bi-directional relationship with other items
- a non-directional relationship with other items

That are

Click the checkbox to find tree nodes or cases that have the following hierarchical structure with selected nodes:
- Ancestors of (above the selected node in the tree hierarchy)
- Ancestors of, including (above and including the selected node)
- Descendants of (below the selected node in the tree hierarchy)
- Descendants of, including (below and including the selected node)
- Children of (directly below the node in the tree hierarchy)
- Children of, including (directly below and including the selected node)
- Siblings of (at the same level in the hierarchy as the selected node)
- Siblings of, including (same level and including the selected node)

Click the Select button to choose the required nodes.
Cases where

Click the checkbox to find cases where an attribute is (or is not) equal to a specified value.

To find cases based on attribute values:
1. Choose the required attribute from the drop-down list.
2. Choose the required condition from the drop-down list— for example equals value.
3. Choose the required attribute value from the drop-down list.

When working with attribute values that are text strings (gender = male, female) the 'greater' and 'less than' options relate to the value's position in the Attribute Properties values list. Refer to Adding Attribute Values for more information.

With Relationship type

Click the checkbox to find relationships based on type and related item.

To find relationships of any type, select Any Relationship Type from the drop-down list.

OR

To find relationships of a selected type, select the type from the drop-down list. Refer to Adding Relationship Types for more information.

To look for all relationships that are with, from or to other selected relationships:
1. Select the required direction from the With drop-down list and click the Select button.
   
   The Select Project Items dialog box is displayed.

2. Click the folder that contains the required sources or nodes. Click the folder check box to include all items in the folder— to include all items in subfolders click the Automatically select subfolders option.

3. Check the boxes for the items you want to include. To select all nodes under a parent node, click the Automatically select hierarchy check box.

4. Click OK.
Sets with Click the checkbox to find sets that contain items.

To find sets that contain at least one item, select **At least one Item** from the drop-down list.

To find sets that contain selected items:

1. Click **Selected Items** in the drop-down list.
   
   The **Select Project Items** dialog box is displayed.

2. Click the folder that contains the required items.
   
   Click the folder check box to include all items in the folder— to include all items in subfolders click the **Automatically select subfolders** option.

3. Check the boxes for the items you want to include.
   
   To select all nodes under a parent node, click the **Automatically select hierarchy** check box.

4. Click **OK**.

5. When you have specified the required criteria, click **Find Now**.

   The results of the search are displayed in **List View**. From here, you can open items, add items to a set, print items, add items to a model and so on.

---

**Using Advanced Find: Advanced**

You can build a list of criteria for finding your project items. For example, you could find:

- Cases who are *women* and are also over the age of 50
- Documents coded by *adventure* and coded by *travel*
- Externals whose description contains the term *photo*
- Tree nodes that were created *last week* and that code documents in the *Interviews* folder
- Audio/Video files with duration value of less than 2:00 minutes

To gather project items based on a combination of criteria:

1. On the **Tools** menu, click **Find**.
2. Click the **Advanced Find** option.
   
   The **Advanced Find** dialog box is displayed.

3. Click the **Advanced** tab.
4. From the **Look for** drop-down list, select the type of project item you want to find—this selection determines the search options that are available.
5. In the Define More Criteria panel, select the required criteria—comprised of Interaction, Option and Value. For example, you could find all cases where the age is equal to 50.

6. Click the Add to List button. The selected criteria are displayed in the Find Items that match these criteria panel.

7. If required, define more criteria and add it to the list.

8. Click the Find Now button.

The results of the search are displayed in List View. From here, you can open items, add items to a set, print items, paste items into a model and so on.

---

A Quick Way To Do This

<table>
<thead>
<tr>
<th>Find Bar:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>On the Find Bar, click the Options button.</strong></td>
</tr>
<tr>
<td>2. <strong>Click the Advanced Find option.</strong></td>
</tr>
<tr>
<td>3. <strong>Click the Advanced tab.</strong></td>
</tr>
</tbody>
</table>

---

Using Grouped Find

Grouped Find enables you to list selected items and find the items related to them. For example, you can list:

- Sources and the nodes that code them

![Grouped Find Results Diagram](image)

- Nodes and the sources they code
- Attribute values and the matching cases
- Nodes or sources and the items they have a relationship with
- Nodes or sources and the items they link to
- Project items and the models they appear in
To Find and Group Project Items:

1. On the Tools menu, click Find.
2. Click the Grouped Find option.
   The Grouped Find dialog box is displayed.
3. From the Look for drop-down list, select the type of project item you want to find—this selection determines the search options that are available. For example, to find sources and the nodes that code them, select Items Coding.
4. To include all relevant items in the scope, select the All <Items> option from the Scope drop-down list.
   OR
   To include only selected items in the scope, click the Selected Items option from the Scope drop-down list.
   The Select Project Items dialog box is displayed:
   a. On the left, click the required folder. Click the folder check box to include all items in the folder.
   b. On the right, click the check boxes for the required items. To select all nodes under a parent node, click the Automatically select hierarchy checkbox.
   c. You can use the Filter button to limit the display to items that match specific criteria—refer to Finding Project Items by Name for more information. Click the Select All button to automatically select items matching the criteria.
5. To include all relevant items in the range, click the All <Items> option from the Range drop-down list.
   OR
   To include only selected items in the range, click the Selected Items option from the Range drop-down list.
6. The Coded By drop-down list is only available when you select Items Coding or Items Coded At from the Look for drop-down list. By default, NVivo displays coding by all users—you can limit the results to coding by the current user only or coding by selected users.
7. If you have selected Relationships from the Look for drop-down list, you can specify the direction and type in the Relationship Criteria panel.
8. Click the Find Now button.
   The find results are displayed, grouped by the specified scope items.

→ A Quick Way To Do This

Find Bar:
1. On the Find Bar, click the Options button.
2. Click the Grouped Find option.
Projects

About Projects

What is in a Project?

A project is a file that contains:

- Internal source materials—your primary data such as field notes, audio/video interviews and pictures
- External source materials representing books, hand-written diaries and other materials that cannot be imported
- Memos that you use to hold your observations and ideas
- Nodes representing the themes, cases or relationships that you use for coding
- Attributes (such as age or gender) assigned to cases
- Queries for finding patterns and pursuing ideas
- Models that enable you to graphically demonstrate and explore your research data

When you save a project it is stored on your computer as a .nvp file. By default, projects are stored in your My Documents folder. If you are running Windows Vista, projects are stored in the Users<username>\Documents folder.

All your project data is stored in a single file (except for audio or video content which may be stored outside your project), so you can easily move it to a new location.

If your project includes audio/video content stored outside the project, you can still move your project to a new location, however, you may need to move the media files as well or update media file locations within your project. Refer to Storing Audio and Video for more information.

NVivo 2, NVivo 1, N4-N6 Projects

You can open projects created in NVivo 2, NVivo 1, N6, N5, and N4. When you open an older project, NVivo will create a new project based on the conversion options that you specify—your older project is not overwritten.

NVivo 7 Projects

You can open projects created in NVivo 7. Although, unlike the earlier versions mentioned above, NVivo will overwrite your NVivo 7 project and create an updated version based on the conversion options that you specify.

ATLAS.ti and MAXQDA Projects

You can convert projects created in MAXQDA 2007 (*.mx3) and ATLAS.ti versions 5.2 and 5.5. When you convert a project, NVivo will create a new project based on the conversion options that you specify—your original project is not overwritten.

Merging 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.
Creating Projects

To create a new project:

1. On the Welcome screen, click the New Project button. OR
2. On the File menu, click New Project.
   The New Project dialog box is displayed.
3. Enter a name for your project in the Title field.
   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. By default projects are saved to your My Documents folder. If you are running Windows Vista, projects are stored in the Users<username>\Documents folder.
   You can edit this default in Application Options.
6. Click OK.
   The NVivo window is displayed with project file name in the title bar.

Clearing My Recent Projects

To clear the My Recent Projects list on the NVivo Welcome screen:

1. On the Tools menu, click Options.
   The Application Options dialog box is displayed.
2. On the General tab, click the Clear Recent Project List button.
   All projects are cleared from the list and you can use the Open Project button to open the required project.

Opening Projects from Previous Versions

When you open an early-version project in NVivo, a new project is created with a .nvp extension—the original project is not overwritten.

To open and convert an early project:

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 legacy project you want to open. You can open the following projects in NVivo 8:
   - NVivo & NUD*IST Projects (.nvp, .qda, .stp)
   - NVivo 7 & 8 (.nvp)
   - NVivo 1 or 2 (.qda)
   - N4, N5 or N6 including N6 Student (.stp)
3. Locate the 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 to choose the destination and name for the converted project.

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**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code sources at cases</td>
<td>Click this option to create a case for each document in the project. The case name is based on the document name. Each document is coded at the case created for it.</td>
</tr>
<tr>
<td></td>
<td>If the documents in your existing project are already coded at cases, then do not select this option.</td>
</tr>
<tr>
<td></td>
<td>For <strong>NVivo 1</strong> and <strong>2</strong> projects, existing document attributes are converted to case attributes.</td>
</tr>
<tr>
<td>Import paragraph styles</td>
<td>Click this option if you want to import the text styles used in the existing project. Clear the check box, if you want to use default NVivo 8 paragraph styles.</td>
</tr>
<tr>
<td>Project requires a username, or</td>
<td>If the project you are converting is password protected, click the check box and enter the required user name and password.</td>
</tr>
<tr>
<td>username and password</td>
<td></td>
</tr>
</tbody>
</table>

11. If required, enter the relevant user name and/or password for the converted project.

12. Click the **Convert** button.

   For **NVivo 2** users: Any files in your NVivo 2 'External DataBites' folder will be imported into your NVivo 8 project as 'externals'. However, paths to the files will still refer to their original location i.e.: \All Users\External DataBites\ or elsewhere in your NVivo 2 project folder structure. Before you delete the NVivo 2 project, you should copy these files to a different folder and update the file path or location within the NVivo 8 externals. Refer to [Creating Externals](#) for more information.

**Items Not Converted**

For **NVivo 1** and **2** projects the following items are not included in your new **NVivo 8** project:

- Models
- Team member login information such as user names and passwords
- Team member named “Administrator”
- Node-to-node links
- Extract nodes
Any background colors or text highlighting

For NVivo 7, teams and team member information are not included in your new project.

For N4, N5 and N6 projects the following items are not included in your new project:
- Matrix nodes
- Clipboard node
- Reports folder
- Commands folder
- Raw files folder

Converting ATLAS.ti Projects to NVivo

ATLAS.ti projects (versions 5.2 and 5.5) can be converted to NVivo. To do this, you will need to first export the Hermeneutic Unit (HU) as an XML file (*.xml), including its Primary Documents (PDs) and Quotations (meta info only). When you open the ATLAS.ti XML file in NVivo, a new project is created with a .nvp extension—the original project is not overwritten.

Before exporting to XML from ATLAS.ti

In the ATLAS.ti HU, change any relative file-paths (HUPATH or TBPATH) of each PD to 'Absolute', e.g. C:\Documents and Settings\username\My Documents\PrimaryDocument1.doc. If not changed to 'Absolute' paths, NVivo will not be able to locate the files and the PDs will be converted to 'externals'—any coding will be discarded and the file path will simply be recorded in the external properties.

Also, make sure that the PDs are in the following formats:
- Text documents - .doc, .docx, .rtf, .txt, .pdf
- Audio files - .mp3, .wma, .wav
- Video files - .mpg, .mpeg, .mpe, .wmv, .avi, .mov, .qt., mp4
- Picture files - .bmp, .gif, .jpg, .jpeg, .tif, .tiff

These will be converted into sources (i.e. Documents, Audio, Video and Picture Sources) in NVivo.

If you have PDs that are in a format other than the ones listed above, these PDs will be converted to 'externals' in NVivo.

When you export an ATLAS.ti 5.2 HU to XML and import it to NVivo, any quotations for videos will automatically be converted. If you have opened your ATLAS.ti 5.2 HU in ATLAS.ti version 5.5 and it contains quotations for videos, you will need to open any .avi and .mpeg videos and play a segment before exporting the HU to XML. This will ensure that the quotations for videos will be converted correctly in NVivo.

Opening the ATLAS.ti XML file in NVivo

To open and convert the ATLAS.ti XML file:
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 Atlas XML Export (*.xml).
3. Locate the folder that contains the project you want to convert.
4. Click the required file.
5. Click the **Open** button. The **Convert Project** dialog box is displayed.

6. Click the **Browse** button to choose the destination and enter a name for the converted project.

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**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code sources at cases</td>
<td>Click this option to create a case for each primary document (PD) that is converted to a source. The case name is based on the PD name. Each PD, which is converted as a 'source' in NVivo, is coded at the case created for it.</td>
</tr>
<tr>
<td>Import paragraph styles</td>
<td>This option is not available when converting an ATLAS.ti XML file.</td>
</tr>
<tr>
<td>Project requires a username, or username and password</td>
<td>This option is not available when converting an ATLAS.ti XML file.</td>
</tr>
</tbody>
</table>

11. Click the **Convert** button.

**How ATLAS.ti elements are converted to NVivo project items**

<table>
<thead>
<tr>
<th>ATLAS.TI</th>
<th>NVivo</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>HU exported as a single XML file</td>
<td>Single .nvp file</td>
<td>The original file will not be overwritten.</td>
</tr>
<tr>
<td>Name</td>
<td>Title</td>
<td>HU name is retained as the NVivo project name.</td>
</tr>
<tr>
<td>Comment</td>
<td>Description</td>
<td>Text will be truncated during conversion if it contains more than 512 characters.</td>
</tr>
<tr>
<td>Authors</td>
<td>Users</td>
<td>Any Authors (all those in the co-authors list as well as those assigned to objects but not present in the co-authors list) in the HU will be created as users in NVivo.</td>
</tr>
</tbody>
</table>

You can apply various settings to the converted project. For information, refer to **Setting Project Properties**.
**Primary Documents (PDs)**

<table>
<thead>
<tr>
<th>ATLAS.TI</th>
<th>NVivo</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text file</td>
<td>Document source</td>
<td>The source will contain the original content of the text file.</td>
</tr>
<tr>
<td>Audio file</td>
<td>Audio source</td>
<td>You will be able to play the media content within the created source but conversion will not embed the file within the NVivo project. The audio file will remain stored outside the NVivo project.</td>
</tr>
<tr>
<td>Video file</td>
<td>Video source</td>
<td>You will be able to play the media content within the created source but conversion will not embed the file within the NVivo project. The video file will remain stored outside the NVivo project.</td>
</tr>
<tr>
<td>Picture file</td>
<td>Picture source</td>
<td>The source will contain the image from the original picture file.</td>
</tr>
<tr>
<td>Memo promoted to PD</td>
<td>Memo</td>
<td>The promoted memo is not converted to a source in NVivo, even if it is considered a PD in the ATLAS.ti HU. It is converted as a memo in NVivo and retains any coding references.</td>
</tr>
</tbody>
</table>

If the file being converted is not found, is using an unknown file format or the file path is relative and begins with `<HUPATH>` or `<TBPATH>`, the files will be converted to an 'external'. For more information about externals, refer to About Internals, Externals and Memos.

If you selected the option 'Code sources to cases', the PDs will be converted to sources and a case will be created for each source. Both the source and case created will have the same name. The entire source will be coded to the case. For more information, refer to Creating Cases from Sources.

Comments will be converted as source descriptions and truncated if they contain more than 512 characters.

**Quotations**

<table>
<thead>
<tr>
<th>ATLAS.TI Elements</th>
<th>NVivo Project Items:</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quotation</td>
<td>Node reference</td>
<td>All quotations created in PDs are converted as node references for the created sources in NVivo. The codes where they were linked to in ATLAS.ti are converted as free nodes in NVivo. See 'Codes and Families' for more information.</td>
</tr>
<tr>
<td>Quotation not linked to any code</td>
<td>Node reference</td>
<td>If a quotation is not linked to any code in ATLAS.ti, then it will be converted as a node reference to a free node named 'Unused'</td>
</tr>
</tbody>
</table>
### Quotations'

<table>
<thead>
<tr>
<th>Comment in a quotation</th>
<th>Annotation</th>
<th>Any comment created for the quotation is converted as an annotation for the source. For more information, refer to About Annotations.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memo linked to a quotation</td>
<td>See Also Link</td>
<td>If a memo is linked to a quotation, a 'See Also' link is created from the quoted text in the source to the memo. For more information, refer to About See Also Links.</td>
</tr>
</tbody>
</table>

#### Codes and Families

Free codes are converted to 'Free Nodes' in NVivo. A free node called "Unused Quotations" is created for quotations not mapped to any code in ATLAS.ti. For more information, refer to About Nodes.

Coding relations are converted to 'Relationship Types' in NVivo. For more information, refer to About Relationships.

Families are converted to 'Sets' in NVivo. For more information, refer to About Sets.

#### Memos

Memos are converted to 'Memos' in NVivo. For more information, refer to About Internals, Externals and Memos.

If a memo is linked to a free code in ATLAS.ti, a 'See Also' link will be used to relate the converted memo and node. For more information, refer to About See Also Links.

### Items Not Converted

The following ATLAS.ti family types will not be converted:

- Super Code Family
- Super Memo Family
- Super Primary Document Family

### Converting MAXQDA Projects to NVivo

MAXQDA 2007 projects (.mx3) can be converted to NVivo. When you open a MAXQDA project in NVivo, a new project is created with a .nvp extension—the original project is not overwritten.

To open and convert a MAXQDA project:

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 MAXQDA 2007 Projects (*.mx3).
3. Locate the folder that contains the project you want to open.
4. Select the MAXQDA project file you want to convert.
5. Click the Open button.
   The Convert Project dialog box is displayed.
6. Click the **Browse** button to choose the destination and name for the converted project.

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**.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code sources at cases</td>
<td>Check this option to create a case for each document (text). The case name is based on the document name. Any user-defined attributes associated with the text, are converted to attributes on the case, and the document is coded at the case created for it. Note: If you do not check this option, user-defined attributes are discarded during conversion.</td>
</tr>
<tr>
<td>Import paragraph styles</td>
<td>This option is not available when converting a MAXQDA project.</td>
</tr>
<tr>
<td>Project requires a username, or username and password</td>
<td>This option is not available when converting a MAXQDA project.</td>
</tr>
</tbody>
</table>

11. Click the **Convert** button.

**How MAXQDA elements are converted to NVivo project items**

**Projects and authors**

<table>
<thead>
<tr>
<th>MAXQDA</th>
<th>NVivo</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAXQDA project (.mx3)</td>
<td>NVivo project (.nvp)</td>
<td>The original project file is not overwritten.</td>
</tr>
<tr>
<td>Author</td>
<td>User</td>
<td>All authors in the MAXQDA project are created as users in the NVivo project.</td>
</tr>
</tbody>
</table>

**Texts, text groups, text sets, text memos and attributes**

<table>
<thead>
<tr>
<th>MAXQDA</th>
<th>NVivo</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text group</td>
<td>User folder within the Internals folder</td>
<td>The maximum length of the description is 512 characters. The memo will be truncated during conversion if it contains more than 512 characters. If the MAXQDA memo contains</td>
</tr>
</tbody>
</table>
linked codes, a 'See Also' link is created, linking the first word of each document (text) in the folder (text group) to the corresponding node.

If the MAXQDA project has a memo attached to the root level 'Texts' group, this is converted to the NVivo project description, but any linked codes are not converted.

<table>
<thead>
<tr>
<th>Text set</th>
<th>Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memo attached to text set</td>
<td>Set description</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Text</th>
<th>Document source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memo attached to entire text</td>
<td>Memo</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Memo attached to a text segment</th>
<th>Annotation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attributes (user-defined)</th>
<th>Attribute of a case</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
attributes (values '0' or '1') in NVivo.
MAXQDA attributes resulting from transformed codes are not converted.

<table>
<thead>
<tr>
<th>Codes, code sets, code memos and coding</th>
<th>MAXQDA</th>
<th>NVivo</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Tree node</td>
<td>Code color attributes are not converted.</td>
<td></td>
</tr>
<tr>
<td>Memo attached to a code</td>
<td>Memo</td>
<td>The memo is linked to the node by a memo link. If the MAXQDA memo contains linked codes, a 'See Also' link is created, linking the first word of the memo to the corresponding node.</td>
<td></td>
</tr>
<tr>
<td>Code set</td>
<td>Set</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coding (code references)</td>
<td>Node references</td>
<td>Weight scores on coded segments are not converted. Color coding codes (red, green, blue, magenta) and code references are converted, but the color coded text segments will not be displayed with highlight color in NVivo.</td>
<td></td>
</tr>
</tbody>
</table>

If the MAXQDA project contains texts, codes or other elements with duplicate names, when converted to NVivo, numbers are appended to the names to ensure uniqueness.

Items Not Converted
Maps created using MAXMaps are not converted. If you want to preserve the image of a map, you can export the map to a graphics file (.bmp or .jpeg) and then import it into your new NVivo project as a picture source. Note: You cannot edit the picture source image in NVivo.

Setting Project Properties
Project properties enable you to provide high-level information about your project.

A number of project properties default to the current application settings but you can change them for individual projects.

To set project properties:
1. On the File menu, click Project Properties. The Project Properties dialog box is displayed.
2. To edit the title and description for the project, click the General tab.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>A name that identifies the project. 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.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the project such as research objectives and goals.</td>
</tr>
<tr>
<td>File Name</td>
<td>The path and file name of your project. You cannot edit the contents of this field. If required, you can move the project file (.nvp) using the Windows file system.</td>
</tr>
<tr>
<td>Index language</td>
<td>To ensure efficient performance of text searches, choose the appropriate language from the drop-down list. Stemmed text searches are not available for languages other than English.</td>
</tr>
<tr>
<td>Created</td>
<td>The date and time the project was created. NVivo sets this date and time and you cannot change it.</td>
</tr>
<tr>
<td>Modified</td>
<td>The date and time the project was last modified. NVivo sets this date and time and you cannot change it.</td>
</tr>
</tbody>
</table>

3. To edit the default labels for attribute values and relationship types, click the Labels tab. 

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Unassigned&quot; attribute value label</td>
<td>If you want to use another term for the attribute value 'unassigned' (such as 'blank' or the equivalent in another language) you can enter it in this field. The term must be unique among attribute values. See also Adding Attributes.</td>
</tr>
<tr>
<td>&quot;Not Applicable&quot; attribute label</td>
<td>If you want to use another term for the attribute value 'not applicable' (such as 'irrelevant' or the equivalent in another language) you can enter it in this field. The term must be unique among attribute values.</td>
</tr>
</tbody>
</table>
"Associated" relationship type label

**NVivo** provides a default relationship type. It is non-directional (_____ ) and is labeled Associated. Although you cannot change the direction of this default relationship type, you can enter a new label (for example, 'Related' or the equivalent in another language).

You can set another relationship type as the default by selecting it, clicking the **Project** menu and choosing the **Default Relationship Type** option.

See also About Relationship Types.

| Reset | Click this button to reset labels back to the term defined in Application Options. |

4. To set passwords for the project, click the **Passwords tab**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read/Write password</td>
<td>A password that enables you to view and update all items in your project. You can enter up to twelve alpha-numeric characters. The password is case-insensitive and is displayed as a series of asterisks.</td>
</tr>
<tr>
<td>Read Only password</td>
<td>A password that enables you to view but <em>not</em> update project items. You can enter up to twelve alpha-numeric characters. The password is case-insensitive and is displayed as a series of asterisks.</td>
</tr>
<tr>
<td>Confirm password</td>
<td>The same password to confirm that it is correct.</td>
</tr>
<tr>
<td>Password hint</td>
<td>A hint to remind you of your password. For example, <em>my pet</em>.</td>
</tr>
<tr>
<td>Clear</td>
<td>Click this button to remove a password setting.</td>
</tr>
</tbody>
</table>

5. To view or change user initials, click the **Users tab**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>This is for viewing only. You cannot change or remove user names. To modify user profiles, refer to Setting Application Options for details.</td>
</tr>
<tr>
<td>Initials</td>
<td>You can modify the initials of all users displayed. Changes will apply to the currently opened project.</td>
</tr>
</tbody>
</table>
6. To change the format of a selected text style, click the **Paragraph Styles tab**.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Font</td>
<td>Select a style and choose the required font from the drop-down list. You can choose from the fonts that are available on your computer.</td>
</tr>
<tr>
<td>Size</td>
<td>Select a style from the list and select the required point size.</td>
</tr>
<tr>
<td>Color</td>
<td>Select a style and choose a color from the drop-down list.</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>Check the box to make a selected style <strong>bold</strong>.</td>
</tr>
<tr>
<td><strong>Italic</strong></td>
<td>Check the box to make the selected style <strong>italic</strong>.</td>
</tr>
<tr>
<td><strong>Underline</strong></td>
<td>Check the box to make the selected style <strong>underlined</strong>.</td>
</tr>
<tr>
<td><strong>Reset Style</strong></td>
<td>Click this button to return the selected text style to the default settings.</td>
</tr>
<tr>
<td><strong>Reset System Styles</strong></td>
<td>Click this button to return all text styles to the default settings.</td>
</tr>
<tr>
<td><strong>New Style</strong></td>
<td>Click this button to create a new style. Enter a name for the style in the given field and select the settings.</td>
</tr>
<tr>
<td><strong>Remove Style</strong></td>
<td>Click this button to delete a selected style.</td>
</tr>
</tbody>
</table>

The formats will be available for **new** sources but are not applied to existing sources.

7. To change the format or create new model styles, click the **Model Styles tab**.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Style</strong></td>
<td>Click to add a new style.</td>
</tr>
<tr>
<td><strong>Remove</strong></td>
<td>Click to remove a selected style. You cannot remove the <strong>default</strong> style.</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>Enter a name for a new style. You cannot change the name of the <strong>default</strong> style.</td>
</tr>
<tr>
<td><strong>Text</strong></td>
<td>These options apply to the text that appears in model shapes and with connector lines.</td>
</tr>
<tr>
<td>----------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Font</strong></td>
<td>Select a style and choose the required font from the drop-down list. You can choose from the fonts that are available on your computer.</td>
</tr>
<tr>
<td><strong>Size</strong></td>
<td>Select a style and enter the required point size or select it from the drop-down list.</td>
</tr>
<tr>
<td><strong>Color</strong></td>
<td>Select a style and choose the required color from the drop-down list.</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>Select a style and click the <strong>Bold</strong> check box to make the text <strong>bold</strong>.</td>
</tr>
<tr>
<td><strong>Italic</strong></td>
<td>Select a style and click the <strong>Italic</strong> check box to make the text <strong>Italic</strong>.</td>
</tr>
<tr>
<td><strong>Underline</strong></td>
<td>Select a style and click the <strong>Underline</strong> check box to underline the text.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Line</strong></th>
<th>These options apply to shape borders and connectors.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Style</strong></td>
<td>Select a style and choose the line type from the drop-down list.</td>
</tr>
<tr>
<td><strong>Weight</strong></td>
<td>Select a style and choose a weight from the drop-down. <strong>Weight</strong> refers to the thickness of a line.</td>
</tr>
<tr>
<td><strong>Color</strong></td>
<td>Select a style and choose a color from the drop-down list.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Fill</strong></th>
<th>This option applies to the background color of shapes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Color</strong></td>
<td>Select a style and choose a color from the drop-down list.</td>
</tr>
</tbody>
</table>

| **Reset Style** | Click this button to return the default formats back to the **NVivo** factory settings. This button is only available for the default style. |

---

When you add or edit styles, the changes are available for new shapes and connectors—they are not applied to existing shapes and connectors. For more information about model styles refer to Setting Styles for Models.
8. To change media file settings and customize transcript fields, click the Audio/Video tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Embed media in project if file size less than</td>
<td>By default, this box is checked and the maximum file size indicated is 20 MB. This means any media files you import will become part of the project file automatically as long as the file size is less than 20 MB. You can change the maximum size of the files to embed using your keyboard or by using the up and down arrows. Clear the box if you do not want to embed audio or video files within the project.</td>
</tr>
</tbody>
</table>

Audio tab
Press the New button to create a new transcript property. You can change the name of this property by typing over the default text "New Transcript Property". This will create a new column in the transcript table. You can change the placement of the new column by using the Move Up and Move Down buttons. To remove the property, press Remove.

Video tab
Press the New button to create a new transcript property. You can change the name of this property by typing over the default text "New Transcript Property". This will create a new column in the transcript table. You can change the placement of the new column by using the Move Up and Move Down buttons. To remove the property, press Remove.

The changes and customization will affect currently opened projects only.

9. Click Apply to save the changes made in a tab.
10. Click OK when you have finished working with project properties.

Saving Projects

To save your project:
On the File menu, click Save Project.
OR
Click the Save Project button on the Main toolbar:

NVivo can remind you to save at appropriate intervals. You can set save reminders in Application Options.

You cannot save a project unless you have read/write access to it.
Closing Projects

To close a project:
On the File menu, click Close Project.
You are prompted to save any unsaved changes.
The NVivo Welcome screen is displayed.

Copying and Backing-up Projects

To backup your project you can copy it to another location. To copy an existing project:
1. On the File menu, click Copy Project.
   The Copy Project dialog box is displayed.
2. In the Copy project field, click the Browse button.
   The Copy From Project File dialog box is displayed.
3. Click the project you want to copy. By default, projects are stored in your My Documents folder—if you are running Windows Vista, projects are stored in the Users\<username>\Documents folder. If the project you want to copy is in another location, locate it using the Look in drop-down list.
4. Click the Open button.
5. In the To location field, click the Browse button.
   The Copy To Project File dialog box is displayed.
6. In the Save in drop-down list, click the destination folder.
7. In the File name field, enter a name for the copied project.
8. Click the Save button.
9. Click OK.

Compacting and Repairing Projects

You can use the Compact and Repair facility when a project is performing slowly or behaving unpredictably. Projects can become fragmented and use disk space inefficiently —especially if they contain large numbers of sources and coding references.

To ensure optimal performance, you should compact and repair your NVivo projects on a regular basis.

To compact and repair a project:
1. On the File menu, click Close Project to close the currently open project.
2. On the Tools menu, click the Compact and Repair option.
   The Select Project dialog box is displayed.
3. Locate and select the project you want to compact and repair.
4. Click the Open button.
   The Compact and Repair facility performs project maintenance and optimization.
If there are inconsistencies in your project, you may get a dialog box detailing this out and asking if you wish to proceed or cancel the operation. You might want to create a backup of your project before clicking Yes to proceed. Refer to Copying and Backing Up Projects for details.

Importing Projects

You can merge projects by opening a 'target' project and importing another project or selected parts of another project. For example, you could import an existing project's node structure (without the coded content) into a new project, or you could import all sources and coding created by a particular user.

Only projects created in the same version of NVivo can be merged. You can convert a project from an earlier version of NVivo to your current version, refer to Opening Projects from Previous Versions for more information.

Duplicate project items are not imported. More information

Sources (documents, pictures, media sources, externals and memos)

Text-based sources (documents, externals or memos) are duplicates when both sources have the same name, hierarchical location and text content. Any differences in text formatting are ignored.

Picture sources are duplicates when both sources have the same name, hierarchical location and the same image. Any differences in image rotation, brightness or contrast are ignored. Any differences in picture logs are ignored.

Media sources are duplicates when both sources have the same name, hierarchical location and when both contain either a matching media item, or no media item at all. Any differences in transcripts are ignored.

Links (memo links, see also links and annotations)

Memo links are duplicates when both link the same memo to the same source item.

See also links are duplicates when both link the same project item content to the same destination.

Annotations are duplicates when both have the same text and are linked to the same project item content.

Queries, query results and matrices

Queries, query results and matrices are considered duplicates when they have the same name, location and modification date.

Models

Models are considered duplicates when they have the same name, location and modification date.

Attributes and attribute values

Attributes are duplicates when both have the same attribute name and the same data type (for example, string).

Attribute values are duplicates when both have the same attribute name, same data type and the same attribute value name.

Free nodes, tree nodes, cases and relationships

Free nodes, tree nodes and cases are considered duplicates when they have the same name and hierarchical location.

Relationships are considered duplicates when both have the same name, location and direction.
Sets
Sets are considered duplicates when both have the same name and hierarchical location.

User folders
User folders are considered duplicates when both have the same name and hierarchical location.

When you import content, you decide how you want to handle duplicates—you can choose to merge the duplicates or create new project items. More information about these options:

- **Merge into existing item**
  Choose this option to combine the content of duplicate items. If you choose this option:
  - Folders and sets with matching names and hierarchical locations are combined.
  - If a duplicate source has different linked memos, the memos from the imported item are appended to the linked memos in the target project.
  - If a duplicate media source contains a transcript, then the transcript entries are considered duplicates when both the timespan and text in the **Content** field is matched. Any unique transcript entries are added to the matching source in the target project.
  - If a duplicate transcript entry has different text within a custom transcript field (and the field exists in both projects), any unique custom field content is appended to the content of the matching field. For example, if the custom field ‘Speaker’ has the value **Anne** in the target project versus the value **Kate** in the imported project, then after import, the value in the target project will be **Anne, Kate**.
  - If an imported project contains uniquely-named custom transcript fields, these custom fields are added to the target project (until you have reached the limit of 10 custom transcript fields). The values of the custom fields are added to matching transcript entries.
  - If a picture source is a duplicate, any unique log entries in the imported project are added to the matching source in the target project.
  - If two nodes have the same name but different content coded at them, then content from the imported node is combined with the content of the target node (if the content exists in the target project or is also being imported).
  - Cases in the target project retain their attributes and attribute values, however if the target case has an 'Unassigned' attribute value, the value from the imported case will replace it.

- **Create new item**
  Choose this option if you want to import duplicate items, renaming them so that both items exist in the target project.

  The new item inherits all the content of the item in the imported project but has a sequential number appended to the name—for example, a node called **Community** would be imported and renamed **Community (2)**.

Where a source, model or query is not a duplicate, but has the same name and location, the item is imported as a new item and renamed with an appended number—for example, **Interview with Sally** would be imported as **Interview with Sally (2)**.

How project properties (including user profiles) are handled during import

User profiles:

  - Duplicate user profiles are not imported. A user profile is considered a duplicate when the name is matched.

  - If both projects contain a user with the same name but different initials, then they are considered to be the same user. The user profile in the target project is not changed,
therefore the user initials of the target project will be used to identify the user in items that are imported into the target project.

- If you import content created or modified by user profiles which do not exist in the target project, then the user profiles are imported into the target project.

**Paragraph styles:**

- Default paragraph styles defined in the target project are not updated when you import a project. Documents created in the imported project retain their original styles, but your project properties are not updated.
- When you import selected project structure and content, custom paragraph styles are not updated. Documents created in the imported project retain their original styles, but your project properties are not updated.
- When you import an entire project, custom paragraph styles may be updated. If you import a project which has custom paragraph styles which do not exist in the target project, the custom styles are added to the target project. If a custom style with the same name exists in both projects, the custom style definition in the target project is not updated.

**Custom transcript fields:**

- Custom transcript fields that are unique to the imported project are added to your project, unless you have reached the limit of 10 custom transcript fields.
- The default model style of the target project is not changed when you import another project. Any imported model which uses the default model style will be updated with the default model style of the target project.
- Other target project properties (for example, name and description) are not updated when you import a project.

You can choose to:

**Import an entire project**

1. Open the ‘target’ project you want to import into.
2. On the **File** menu, click **Import Project**.
   The **Import Project** dialog box is displayed.
3. Click the **Browse** button and select the project you want to import.
4. Click the **Open** button.
   The name of the project you are importing is displayed in the **Project to import** field.
5. Click the **All (including content)** option.
6. Choose how you want to handle duplicate items. You can choose to merge duplicates or create new project items. More information about these options:
   - **Merge into existing item**
     Choose this option to combine the content of duplicate items. If you choose this option:
     - Folders and sets with matching names and hierarchical locations are combined.
     - If a duplicate source has different linked memos, the memos from the imported item are appended to the linked memos in the target project.
     - If a duplicate media source contains a transcript, then the transcript entries are considered duplicates when both the time span and text in the **Content** field is matched. Any unique transcript entries are added to the matching source in the target project.
     - If a duplicate transcript entry has different text within a custom transcript field (and the field exists in both projects), any unique custom field content is
appended to the content of the matching field. For example, if the custom field 'Speaker' has the value Anne in the target project versus the value Kate in the imported project, then after import, the value in the target project will be Anne, Kate.

* If an imported project contains uniquely-named custom transcript fields, these custom fields are added to the target project (until you have reached the limit of 10 custom transcript fields). The values of the custom fields are added to matching transcript entries.

* If a picture source is a duplicate, any unique log entries in the imported project are added to the matching source in the target project.

* If two nodes have the same name but different content coded at them, then content from the imported node is combined with the content of the target node (if the content exists in the target project or is also being imported).

* Cases in the target project retain their attributes and attribute values, however if the target case has an 'Unassigned' attribute value, the value from the imported case will replace it.

* Create new item

Choose this option if you want to import duplicate items, renaming them so that both items exist in the target project.

The new item inherits all the content of the item in the imported project but has a sequential number appended to the name—for example, a node called Community would be imported and renamed Community (2).

7. Click the Import button.

The project is imported and the Imported Project report is displayed.

8. Print the report to keep a record of the import results—you cannot access this report once it is closed.

Import selected project structures

1. Open the 'target' project you want to merge into.

2. On the File menu, click Import Project.

   The Import Project dialog box is displayed.

3. Click the Browse button and select the project you want to import.

4. Click the Open button.

   The name of the project you are importing is displayed in the Project to import field.

5. Click the Selected (excluding content) option.

6. Click the Options button.

   The Import Options dialog box is displayed.

7. Select the structures you want to import.

8. Click OK.

9. Click the Import button.

10. The selected structures are imported and the Import Project report is displayed.

11. Print the report to keep a record of the import results—you cannot access this report once it is closed.
1. Open the 'target' project you want to merge into.
2. On the File menu, click Import Project.
   The Import Project dialog box is displayed.
3. Click the Browse button and select the project you want to import.
4. Click the Open button.
   The name of the project you are importing is displayed in the Project to import field.
5. Click the Selected (including content) option.
6. Click the Options button.
   The Import Options dialog box is displayed.
7. Select the items you want to import. More information
   The Import Options dialog box allows you to:
   - Select the type of project items you want to import—for example, sources and coding
   - Refine your selection to import only items which were created or last modified by particular users
   When selecting items, note that:
   - Only items you select are imported. For example, if you select only sources, only sources are imported—any associated coding, see also links, and annotations are not imported.
   - If you select annotations or see also links, these are only imported if the associated source exists in the target project or is also being imported.
   - If you select coding, it is only imported if the source containing the coding, and the node containing the coding reference, exist in the target project or are also being imported.
   - When you select sources or nodes, memo links will be preserved if the linked memo exists in the target project or is also being imported.
   - If you select sources which are located in a folder that does not exist in the target project, then the folder (and any necessary hierarchical structure) is also imported.
   - If you select tree nodes or cases that are located in a hierarchical structure that does not exist in the target project, then the necessary hierarchical structure is also imported.
   - If you select attributes and attribute values, they are imported without cases, unless you also choose to import nodes and cases.
   - When you import cases, attribute values are only imported when the same attribute already exists in the target project or is also being imported.
   - When an imported case has an attribute value for an attribute that exists in the target project, the attribute value is imported.
8. Click OK.
9. Choose how you want to handle duplicate items. You can choose to merge duplicates or create new project items. More information about these options:
   - Merge into existing item
     Choose this option to combine the content of duplicate items. If you choose this option:
- Folders and sets with matching names and hierarchical locations are combined.

- If a duplicate source has different linked memos, the memos from the imported item are appended to the linked memos in the target project.

- If a duplicate media source contains a transcript, then the transcript entries are considered duplicates when both the time span and text in the Content field is matched. Any unique transcript entries are added to the matching source in the target project.

- If a duplicate transcript entry has different text within a custom transcript field (and the field exists in both projects), any unique custom field content is appended to the content of the matching field. For example, if the custom field 'Speaker' has the value *Anne* in the target project versus the value *Kate* in the imported project, then after import, the value in the target project will be *Anne, Kate*.

- If an imported project contains uniquely-named custom transcript fields, these custom fields are added to the target project (until you have reached the limit of 10 custom transcript fields). The values of the custom fields are added to matching transcript entries.

- If a picture source is a duplicate, any unique log entries in the imported project are added to the matching source in the target project.

- If two nodes have the same name but different content coded at them, then content from the imported node is combined with the content of the target node (if the content exists in the target project or is also being imported).

- Cases in the target project retain their attributes and attribute values, however if the target case has an 'Unassigned' attribute value, the value from the imported case will replace it.

   Choose this option if you want to import duplicate items, renaming them so that both items exist in the target project.

   The new item inherits all the content of the item in the imported project but has a sequential number appended to the name—for example, a node called *Community* would be imported and renamed *Community (2)*.

10. Click the **Import** button.

11. The selected structure and content is imported and the **Import Project** report is displayed.

12. Print the report to keep a record of the import results—you cannot access this report once it is closed.

   It is a good idea to make a copy of the target project before importing all or part of another project into it. Refer to **Copying and Backing Up Projects** for more information.

### Deleting Projects

You cannot delete a project from within **NVivo**.

If required, you can use the Windows file system to delete a project file (.nvp).

   Once you delete a project file, you can no longer open the project in **NVivo**.
Setting a Default Location for Projects

If you want to store all your NVivo projects in a specific place, you can set a default location. When you save a project, you will be prompted to save it in the default location.

To set a default location:
1. On the Tools menu, click Options.
   The Application Options dialog box is displayed.
2. Click the File Locations tab.
3. In the Default location of projects field, click the Browse button.
   The Browse for Folder dialog box is displayed.
4. Select the required folder. If required, use the Make New Folder button to create a new folder.
5. Click OK.
When you create new projects, you will be prompted to save them in the specified default location.

Setting Project Passwords

You can prevent unauthorized access to a project by defining one or both of the following passwords:

Read/Write
A password that allows a user full access to view and edit project items.

Read Only
A password that allows a user to read but not edit project items. You must have a Read/Write password before you can create a Read Only password.

To create passwords:
1. On the File menu, click Project Properties.
   The Project Properties dialog box is displayed.
2. Click the Passwords tab.
3. In the Read/Write Password options, enter a password that enables users to view and edit all project items. You can enter up to twelve alpha-numeric characters. The password is case-insensitive and is displayed as a series of asterisks.
4. In the Confirm password field, enter the password again to ensure it is correct.
5. In the Password hint field, enter a description to remind you of your password. For example, my pet.
6. In the Read Only Password options, enter a password that enables users to view but not edit project items. You must have a Read/Write password before you can create a Read Only password.
7. In the Confirm password field, enter the password again to ensure it is correct.
8. In the Password hint field, enter a description to remind you of your password.
9. Click OK.
Folders

About Folders

NVivo provides a folder for each type of project item — for example, internal sources, tree nodes, queries and models.

You can organize your project by creating your own folders and moving or copying project items into them. You can create your own folders for:

- Sources - Internals, Externals and Memos
- Queries
- Sets
- Models

For example, your sources could be organized in the following way:

NVivo creates the top level folders; Internals, Externals, Memos and Search Folders.

You can create subfolders to organize your sources — for example, Focus Groups and Interviews.

You cannot create your own folders for nodes, links, queries, or classifications.
Adding Folders

You can add your own folders for sources, models and queries.

To add a folder:
1. In Navigation View, click the required folder. For example, click the Internals folder to add a folder under it.
2. On the Project menu, click New Folder.
   The New Folder dialog box is displayed.
3. In the Name field, enter a name for the folder.
4. If required, enter a text description of the folder in the Description field.
5. Click OK.

A Quick Way To Do This

New toolbar button:
1. Click the parent folder.
2. Click the New button on the Main toolbar.
3. Click the Subfolder in This Folder option.

Right-click:
1. Right-click the parent folder.
2. Click the New Folder option.

Copying Folders

To copy one or more folders:
1. In Navigation View, click the folder you want to copy. Hold down the CTRL key and click to select multiple folders or use the SHIFT key to select a range of folders.
2. On the Edit menu, click Copy.
3. Click the destination folder.
4. On the Edit menu, click Paste.

You can only copy folders of the same type. For example, you cannot copy Internals folders into Externals folders.
Copy and Paste toolbar buttons:
1. Select the folder(s) you want to copy.
2. Click the Copy button:
3. Click the destination folder.
4. Click the Paste button:

Right-click:
1. Right-click the folder(s) you want to copy.
2. Click Copy.
3. Right-click the destination folder.
4. Click Paste.

Deleting Folders

When you delete a folder you also delete the items in it.

To remove one or more folders:
1. In Navigation View, select the required folder. Hold down the CTRL key and click to select multiple folders or use the SHIFT key to select a range of folders.
2. On the Edit menu, click Delete.
3. Click Yes to confirm.

If required, you can disable deletion confirmation messages in Application Options.

Right-click:
1. Right-click the folder(s) you want to delete.
2. Click Delete.

DELETE Key:
1. Select the required folders.
2. Press the DELETE key.
Renaming Folders

To change the name of a folder:

1. Click the folder you want to rename.
2. On the Project menu, click Folder Properties.
   The Folder Properties dialog box is displayed.
3. Edit the name in the Name field.
4. If required, edit the description in the Description field.
5. Click OK.

A Quick Way To Do This

Click twice:
1. Click the folder you want to rename.
2. Click the folder name again to make it editable.
3. Edit the name.
4. Press ENTER to apply the changes.

Right-click:
1. Right-click the folder you want to rename.
2. Click Folder Properties.

Moving Folders

To move one or more folders:

1. In Navigation View, click the folder you want to move. Hold down the CTRL key and click to
   select multiple folders or use the SHIFT key to select a range of folders.
2. On the Edit menu, click Cut.
3. Select the destination folder.
4. On the Edit menu, click Paste.

You can only move folders within folders of the same type. For example, you cannot move
Internals folders into Externals folders.
A Quick Way To Do This

Drag and Drop:
1. Click the folder(s) you want to move.
2. Drag them to the destination folder.

Cut and Paste toolbar buttons:
1. Select the folder(s) you want to copy.
2. Click the Cut button:
3. Click the destination folder.
4. Click the Paste button.

Right-Click:
1. Right-click the folder(s) you want to copy.
2. Click Cut.
3. Right-click the destination folder.
4. Click Paste.

Adding Folders to a Set

If required, you can add the contents of a folder to a set.

To add folders to a set:
1. In Navigation View, click the required folder.
2. On the Project menu, click Add to Set.
   The Select Set dialog box is displayed.
3. Click the required set. If there are no existing sets, you will be prompted to create one.
4. Click OK.
   All the items in the selected folder are added to the set.

System folders (those supplied by NVivo) cannot be added to sets. For example, you cannot add the Internals folder to a set.

A Quick Way To Do This

Right-click:
1. Right-click the folder you want to add.
2. Click Add to Set.
Using Search Folders

Search Folders is an option in Navigation View that enables you to see all items with the Sources or Nodes group. This is useful if you want to view and work with items from multiple folders, and perform tasks such as coding, printing, exporting or adding to sets.

Viewing Nodes

You can use the Search Folders to see a list of all nodes in your project— expand the Search Folders in the Nodes group and click All Nodes.

Viewing Sources

You can use the Search Folders to see a list of all sources in your project— expand the Search Folders in the Sources group and click All Sources.

Checking Media Files

To see all media files stored externally, expand the Search Folders in the Sources group and click All Sources Not Embedded.

This is useful if you work with large audio and video files not embedded in the project. The tick in the Available column indicates that the file is available to the project.

If you move or delete linked files, the media files will become unavailable to your project because they are not present in the location specified in the Filename column. If you need to view or work with a media file that is not available, you will need to locate the file and update the file location. Refer to Moving Media Files for more information.

Search Folders contain only shortcuts to actual project items. You cannot delete project items using the Search Folders.
Sources

About Internals, Externals and Memos

In NVivo, 'sources' is the collective term for your research materials. These materials are categorized into the following types:

- Internals
- Externals
- Memos

Internals

Internals are the 'primary' research materials that you import or create inside your NVivo project. Internals can include any combination of the following sources:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Source</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📄</td>
<td>Document</td>
<td>Text-based material such as interviews, field notes, focus groups, project notes and so on</td>
</tr>
<tr>
<td>🎥</td>
<td>Video</td>
<td>Video and associated transcript</td>
</tr>
<tr>
<td>🎧</td>
<td>Audio</td>
<td>Audio and associated transcript</td>
</tr>
<tr>
<td>📷</td>
<td>Picture</td>
<td>Picture and associated picture log</td>
</tr>
</tbody>
</table>

Externals

Externals are 'proxies' for the primary research materials that you cannot import into your NVivo project. For example:

- Handwritten diaries
- Books
- Paper-based news articles
- Web pages
- PowerPoint presentations

You can create an external source and summarize the content of the item—for example, you might enter interesting quotes from an article or summarize the chapters in a book.

If the external represents a web page or a file on your computer you can create a link and easily open it.

Memos

Memos are the 'secondary' research materials that you import or create in your NVivo project. They contain your observations and insights about the data you have collected. If required, you can link a memo to the source or node that inspired it. You can also use memos to keep track of your progress.
through a project. By creating a project 'journal' you can record questions, assumptions and conclusions as you go.

Gathering Sources

Importing Sources

Importing Documents

You can import documents that are of the following file formats:

- Microsoft Word (.doc, .docx)
- Rich Text Format (.rtf)
- Text (.txt)
- Portable Document Format (.pdf)

You can import documents that contain images or tables and you can code at these items. To import documents:

1. In Navigation View, click the Sources button.
2. Click on the Internals folder.
3. On the Project menu, click Import Internals.
   The Import Internals dialog box is displayed.
4. In the Import from field, click the Browse button.
5. In the Import Sources dialog box, select the file you want to import. Hold down the CTRL key to select multiple files or the SHIFT key to select a range of files.
6. Click the Open button.
   The selected files are displayed in the Import from field.
7. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Select this option to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create descriptions</td>
<td>Uses the first paragraph of the imported document to create the document's description.</td>
</tr>
<tr>
<td>Code sources at new cases located under</td>
<td>Code the entire source at a new case. For example, if a document is an interview with Mary Smith you could code the document at a new case Mary Smith. The new case will be added at the root level of the cases folder, unless you specify an alternative location.</td>
</tr>
</tbody>
</table>

To specify an alternative location for the new case:

1. Click the Select button.
   The Select Location dialog box is displayed.
2. On the left, select Cases to add the cases under a selected parent case.
3. On the right, click the required case.
4. Click OK.
Create as read-only: If you want to prevent editing of the imported document, click this check box. Refer to Making Sources Read-Only for more information.

8. Click **OK**.

   The Document Properties dialog box is displayed.

9. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Select this option to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Specify a new name for the document within your NVivo project. By default NVivo uses the filename of the document you are importing.</td>
</tr>
<tr>
<td>Description</td>
<td>Record a description of the document (optional)</td>
</tr>
<tr>
<td>Read-only</td>
<td>If you want to prevent editing of the imported document, click this check box. Refer to Making Sources Read-Only for more information.</td>
</tr>
</tbody>
</table>

10. Click **OK**.

**A Quick Way To Do This**

<table>
<thead>
<tr>
<th>Right-click:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Right-click in <strong>List View</strong>.</td>
</tr>
<tr>
<td>2. Click <strong>Import Internals</strong>.</td>
</tr>
</tbody>
</table>

Microsoft Word headers, footers, footnotes, and end notes are not imported. Drawings created using the Microsoft Word drawing features cannot be imported.

**Importing Audio and Video**

You can import media files of the following formats:

- Video (mpg, mpeg, mpe, wmv, avi, mov, qt, mp4)
- Audio (mp3, wma, wav)

When you import an audio/video file, **NVivo** creates a new audio or video source. By default, **NVivo** will import the media file as follows:
<table>
<thead>
<tr>
<th>File Size</th>
<th>Storage Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 20MB</td>
<td>Embedded within the project.</td>
</tr>
<tr>
<td>More than 20MB</td>
<td>Not embedded within the project.</td>
</tr>
</tbody>
</table>

File location is recorded in your NVivo project. If you move the media file, you will need to update the file location in NVivo. Refer to Moving Media Files for more information.

In both cases, you will be able to play, code and work with the media file from the created audio/video source.

To import audio and video files:

1. In Navigation View, click the Sources button.
2. Click the Internals folder. If you have created sub-folders, select the destination folder.
3. On the Project menu, click Import Internals.

   The Import Internals dialog box is displayed.
4. In the Import from field, click the Browse button.
5. In the Look in list, select the file you want to import. Hold down the CTRL key to select multiple files or the SHIFT key to select a range of files.
6. Click the Open button.

   The selected files are displayed in the Import from field.
7. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Select this option to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create descriptions</td>
<td>This option does not apply to audio or video.</td>
</tr>
<tr>
<td>Code sources at new cases located under</td>
<td>Code the entire source at a new case. For example, if a video is an interview with Mary Smith you could code the video source at a new case Mary Smith. By default, NVivo will store the new case at the root level of the Cases folder. To specify an alternative location for the new case:</td>
</tr>
<tr>
<td>Create as read-only</td>
<td>Make the transcript (if available) for the audio/video file read-only.</td>
</tr>
</tbody>
</table>
8. Click **OK**.

The **<Audio/Video> Properties** dialog box is displayed. You can use this dialog to set source properties, including choosing whether the media file will be embedded within the project or stored in a specific file location outside of the project.

### Setting Storage Options

You can define options that determine how imported media files are stored. You can choose not to embed all files or embed files that are under a specified file size—refer to Setting Import Options for Storing Files for information about how to do this.

Not embedding media files within the project can be useful when you are dealing with many or very large media files—embedding large files can impact on project performance.

You can view all media files stored outside of your project in the **All Sources Not Embedded** folder. Refer to Using Search Folders for more information.

### Importing Pictures

You can import files in the following formats: .bmp, .gif, .jpg, .jpeg, .tif, or .tiff.

To import the pictures:

1. In **Navigation View**, click the **Sources** button.
2. Click the **Internals** folder, and then select the destination folder.
3. On the **Project** menu, click **Import Internals**.
   
   The **Import Internals** dialog box is displayed.
4. In the **Import from** field, click the **Browse** button.
5. In the **Look in** list, select the file you want to import. Hold down the CTRL key to select multiple files or the SHIFT key to select a range of files.
6. Click the **Open** button.

   The selected files are displayed in the **Import from** field.

7. Select the required **options**.

<table>
<thead>
<tr>
<th>Option</th>
<th>Select this option to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create descriptions</td>
<td>This option is not available for pictures.</td>
</tr>
</tbody>
</table>
Code sources at new cases located under

Code the entire source at a new case. For example, if a picture is a photo of Mary Smith you could code the picture source at a new case Mary Smith.

By default, NVivo will store the new case in the Cases root folder.

To specify an alternate location for the new case:
1. Click the Select button.
   The Select Location dialog box is displayed.
2. On the left, select Cases to add the new case under a selected parent case.
3. On the right, click the required case.
4. Click OK.

Create as read-only

Import the file as read-only and prevent changes to the picture resolution and log entries.

Making the picture source read-only does not prevent users from coding or uncoding the picture. You can disable the read-only function after you have imported the file by clearing the check box in Picture Properties. Refer to Viewing Picture Properties for details.

8. Click OK.

The imported pictures are created as picture sources.

Right-click:

1. Right-click in List View.
2. Click Import Internals.

All picture files are converted to JPEG format when they are imported as picture sources. The files also retain this format when they are exported out of NVivo.

If you have notes about the image in a document or text file stored outside NVivo, you can import these into the picture source — refer to Importing Log Entries for more information.

Importing Memos

You can import memos that are of the following file formats:
- Microsoft Word (.doc, .docx)
- Rich Text Format (.rtf)
- Text (.txt)
- Portable Document Format (.pdf)
You can import memos that contain images or tables and you can code at these items. To import memos:

1. In Navigation View, click the Sources button.
2. Click on the Memos folder.
3. On the Project menu, click Import Memos.
   
   The Import Memos dialog box is displayed.
4. In the Import from field, click the Browse button.
5. In the Look in list, select the file you want to import. Hold down the CTRL key to select multiple files or the SHIFT key to select a range of files.
6. Click the Open button.
   
   The selected files are displayed in the Import from field.
7. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Select this option to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create descriptions</td>
<td>Uses the first paragraph of the imported memo to create the document's description.</td>
</tr>
<tr>
<td>Code sources at new cases located under</td>
<td>Code the entire source at a new case. This option is more suitable for primary sources such as interview documents, however you could create a new case for a memo. For example, if a memo is about the research participant Mary, you could code the memo at a new case Mary. Note: instead of choosing this option, it may be better to link the memo to a case called Mary, refer to Adding Memo Links for more information. If you choose this option, the new case will be added at the root level of the cases folder, unless you specify an alternative location. To specify an alternative location for the new case: 1. Click the Select button. The Select Location dialog box is displayed. 2. On the left, select Cases to add the cases under a selected parent case. 3. On the right, click the required case. 4. Click OK</td>
</tr>
<tr>
<td>Create as read-only</td>
<td>If you want to prevent editing of the imported memo, click this check box. Refer to Making Sources Read-Only for more information.</td>
</tr>
</tbody>
</table>

8. Click OK.

   The Memo Properties dialog box is displayed.
9. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Select this option to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Specify a new name for the memo within your NVivo project.</td>
</tr>
<tr>
<td></td>
<td>By default NVivo uses the filename of the memo you are importing.</td>
</tr>
<tr>
<td>Description</td>
<td>Record a description of the memo (optional)</td>
</tr>
<tr>
<td>Read-only</td>
<td>If you want to prevent editing of the imported memo, click this check box.</td>
</tr>
<tr>
<td></td>
<td>Refer to Making Sources Read-Only for more information.</td>
</tr>
</tbody>
</table>

10. Click OK.

**A Quick Way To Do This**

Right-click:
1. Right-click in **List View**.
2. Click **Import Memos**.

Microsoft Word headers, footers, footnotes, and end notes are not imported.
Drawings created using the Microsoft Word drawing features cannot be imported.

Creating Sources

Creating Documents

Documents are the text-based research materials that you import or create in NVivo.

To create a new document:
1. In **Navigation View**, click the **Sources** button.
   The sources folders are displayed.
2. Click the **Internals** folder. If you have created other internals folders, you can select one of those.
3. Click the **New** toolbar button.
4. Click the **Document in This Folder** option.
   The **New Document** dialog box is displayed.
5. Enter a name in the **Name** field.
6. If required, enter a description of the source in the **Description** field.
7. Click **OK**. The document is opened in **Detail View**.
Click in List View:
1. Select the destination folder.
2. Click in the List View.
3. On the Project menu, click New Internal.

Right-click:
1. Select the destination folder.
2. Right-click in the List View.
3. Click New Internal.
4. Select the Document option.

Creating Externals

An external is a type of 'source' in NVivo—it represents material that cannot be imported (websites, books, paper-based references and so on).

It is a good idea to store these files together in a specific location. You can set a default location for external files in Application Options.

To create a new external:
1. In Navigation View, click the Sources button.
   The sources folders are displayed.
2. Click the Externals folder. If you have created other external folders, you can select one of those.
3. Click the New toolbar button.
4. Click the External in This Folder option.
   The New External dialog box is displayed.
5. Enter a name in the Name field.
6. If required, enter a description of the source in the Description field.
7. Click the External tab and define the required options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Select the item that is represented by the external. This might be</td>
</tr>
<tr>
<td></td>
<td>- <strong>File link</strong>: an electronic file that can be opened or played on your computer. For example, a video or audio file.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Web link</strong>: a web URL</td>
</tr>
<tr>
<td></td>
<td>- <strong>Other</strong>: items that cannot be accessed on a computer such as newspaper articles or books.</td>
</tr>
<tr>
<td>File path</td>
<td>If the external represents an electronic file that can be opened on your computer, click the Browse button and locate the file.</td>
</tr>
</tbody>
</table>
If the external represents an item that cannot be accessed by computer, define the physical location—top shelf, my desk, filing cabinet.

Select or enter the content type that the external represents. If you define a new type, it is applied when you click OK—it is then available for all externals in the project. You cannot edit the content type once you have created the external.

Select or enter the paragraph headings that you want to appear in the external. For example, if the external represents a book, you may want it divided into chapters. The unit changes depending on content type you selected in the Contents list. If you created a new content type then you will need to create a new unit type.

Enter the number at which you want the paragraph headings to start.

Enter the number at which you want the paragraph headings to end.

8. Click OK.

The external is displayed in Detail View and you can add notes and summaries as required.

Click in List View:
1. Select the destination folder.
2. Click in the List View.
3. On the Project menu, click New External.

Right-click:
1. Select the destination folder.
2. Right-click in the List View.
3. Click the New External option.

Opening the Linked File

To open a file that is linked to an external:
1. Click the external in List View or open it in Detail View.
2. On the Project menu, click Open External File.
   The file is opened in the associated application.

Creating Memos

A memo is a type of source in NVivo—it can be linked to a specific source or node.
To create a new memo:
1. In **Navigation View**, click the **Sources** button.
   The sources folders are displayed.
2. Click the **Memos** folder. If you have created other memo folders, you can select one of those.
3. Click the **New** toolbar button.
4. Click the **Memo in This Folder** option.
   The **New Memo** window is displayed.
5. Enter a name in the **Name** field.
6. If required, enter a description of the source in the **Description** field.
7. Click **OK**.
   The new memo is opened in **Detail View** and you can add the required content.

```
| A Quick Way To Do This |

**Click in List View:**
1. Select the destination folder.
2. Click in the **List View**.
3. On the **Project** menu, click **New Memo**.

**Right-click:**
1. Select the destination folder.
2. Right-click in the **List View**.
3. Click the **New Memo** option.
```

**Creating Audio and Video Sources**

When you import an audio or video file, **NVivo** automatically creates an audio or video source in the selected **Internals** folder. Refer to **Importing Media Files into Sources** for more information.

You can also create an audio or video source without a media file—this is useful if your media file is not ready to be imported and you want to prepare the transcript now but add the associated file later.

To create an audio or video source
1. In **Navigation View**, click on the **Internals** folder.
2. On the **Main** toolbar, click the **New** button:

```
| New |
```
3. Click the **Audio** or **Video in this folder** option.
   The **New Audio/Video** dialog box is displayed.
4. Enter a name for the audio/video source.
5. If required, enter a description.
6. Click **OK**.
   The source is created without a media file. It also contains an 'empty' transcript—you can enter or import transcript content as required. You can add the media file at a later stage, refer to **Importing Media Files into Sources** for more information.
Managing Sources

Opening Sources

To open a source

1. In Navigation View, click the Sources button.
2. Click the folder that contains the required source. If required, click to expand folders.
3. Click the source you want to open.
4. On the Project menu, click Open <Source> (this option changes depending on the type of source you are working with).

The source is opened in a 'docked' browser window. If required, you can work with the source in a separate window—on the Window menu, click Docked.

You can open multiple sources and move between them using the tabs at the top of the browser.

Moving Sources

To move a source:

1. In Navigation View, click the Sources button.
   The source folders are displayed.
2. Click the folder that contains the required source.
3. In List View, click the source you want to move. Hold down the CTRL key and click to select multiple sources or SHIFT to select a range of sources.
4. On the Edit menu, click Cut.
5. In Navigation View, select the destination folder.
6. On the Edit menu, click Paste.
7. If you are changing the source type, click Yes to confirm.

The source is moved into the selected folder. If a source of the same name already exists in the folder, a number is appended to the name (Interview with Mary 2).
A Quick Way To Do This

Click and drag:
1. In List View, click the source you want to move. Hold down the CTRL key and click to select multiple sources or SHIFT to select a range of sources.
2. Drag the source(s) to the destination folder in the Navigation View.

Main toolbar:
1. In List View, select the items you want to move.
2. Click the Cut button:

3. In Navigation View, click the destination source folder.
4. Click the Paste button.

Right-click:
1. In List View, right-click the item you want to move.
2. Click Cut.
3. In Navigation View, right-click the destination source folder.
4. Click Paste.

You cannot move documents or memos into an externals folder.

Sorting Sources

In List View, you can organize or 'sort' the display of sources to suit the way you want to work.

To sort sources:
1. On the View menu, click Sort By.
2. Click a sort option.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Icon</td>
<td>Sort the sources according to their icon type. This is useful when working with all sources, sets or query results.</td>
</tr>
<tr>
<td>Name</td>
<td>Sort sources alphabetically by name.</td>
</tr>
<tr>
<td>Memo Link</td>
<td>Sort sources by linked memo—for example, sources with a linked memo can be displayed together at the top of List View.</td>
</tr>
</tbody>
</table>
Nodes | Sort by number of nodes that code the source.
---|---
References | Sort by the number of references (occurrences of coding) in the source.
Created On | Sort sources by their creation date.
Created By | Sort sources by users who created them.
Modified On | Sort sources by the date they were last modified.
Modified By | Sort sources by users who last modified them.

### A Quick Way To Do This
Click in the **column headings** of **List View** to sort sources as required.

### Copying Sources
To copy a source:
1. In **Navigation View**, click the **Sources** button.
   The source folders are displayed.
2. Click the folder that contains the source you want to copy.
3. In the **List View**, click the source you want to copy. Hold down the CTRL key and click to select multiple sources or SHIFT to select a range of sources.
4. On the **Edit** menu, click **Copy**.
5. In the **Navigation View**, select the destination folder.
6. On the **Edit** menu, click **Paste**.
7. If you are changing the source type, click **Yes** to confirm.

The source is copied into the selected folder. If the source name already exists, a number is appended to the name, *Interview with Mary 2*.

### A Quick Way To Do This
**Main toolbar:**
1. In **List View**, click the item you want to copy
2. Click the **Copy** button:
   ![Copy button]
3. In the **Navigation View**, click the destination source folder.
4. Click the **Paste** button.

**Right-click:**
1. In the **List View**, right-click the item you want to copy
2. Click **Copy**.
3. In the **Navigation View**, right-click the destination source folder.
4. Click **Paste**.

You cannot copy internals or memos into an externals folder.

**Renaming Sources**

To change the name and description of a source:

1. In the **Navigation View**, click the **Sources** button.
   
   The source folders are displayed.
2. Click the folder that contains the required source.
3. In the **List View**, click the source you want to rename.
4. On the **Project** menu, click **<Source> Properties** (this option changes depending on the type of source you are working with).
   
   The **<Source> Properties** dialog box is displayed.
5. Edit the name and description as required.
6. Click **OK**.

**A Quick Way To Do This**

**Click twice:**

1. In the **List View**, click the source you want to rename.
2. Click the source name to make it editable.
3. Edit the name.
4. Press **ENTER** to apply the changes.

**Right-click:**

1. In the **List View**, right-click the source you want to rename.
2. Click **<Source> Properties**.

**Changing Source Types**

To change a source from one type to another—for example, to change a memo to an internal:

1. In **List View**, click the source you want to change.
2. Click and drag it to a folder of the required type. For example, if you move an internal to a memo folder, it becomes a memo and is available for linking to other project items.
3. Click **Yes** to confirm.

You cannot change an internal or memo to an external.
Go to a Location in Sources

You can use 'go to' to quickly jump to a location in source. For example, you can jump to:
- The next paragraph of a document
- The five minute point in an Audio or Video file
- The 15th row in a video transcript
- The previous row of a picture log

To go to a specific location in a source:
1. Click in Detail View.
2. On the Edit menu, click Go To.
   The Go To dialog box is displayed.
3. In the Go to what list, click the type of item.
4. If required, enter the item number in the Enter <item> Number field. This option changes depending on the Go to what option selected.
5. Click the Go to button. If you did not enter a number, click Next to go to the next occurrence of the item.

Deleting Sources

To delete an internal, external or memo:
1. In Navigation View, click the Sources button.
2. Click the folder that contains the required source.
3. In List View, click the source you want to delete. Click and drag to select multiple consecutive sources, hold down the CTRL key to select multiple non-consecutive sources.
4. On the Edit menu, click Delete.
5. Click Yes to confirm.

→ A Quick Way To Do This

Right-click:
1. In List View, right-click the required item.
2. Click Delete.

DELETE Key:
1. In List View, click the required item.
2. Press the DELETE key.

When you delete a source:
- References to it are removed from relevant nodes and shortcuts to it are removed from relevant sets
- If the source appears in a model, a red cross is displayed to indicate that it has been deleted.
Making Sources Read-Only

If you want to prevent the content of a source from being edited, you can define it as 'read-only'. Although you cannot edit the content of a read-only source you can still code, annotate and create 'See Also' links.

To set a source as read-only:
1. In List View select the required source. Hold down the CTRL key to select multiple sources or SHIFT to select a range of sources.
2. On the Project menu, click <Source> Properties. This option changes depending on the type of source you are working with.
   
   The <Source> Properties dialog box is displayed.
3. Click the Read-only check box.
4. Click OK.

A Quick Way To Do This

Right-click:
1. In List View, right-click the source you want to make read-only. Hold down the CTRL key to select multiple sources or SHIFT to select a range of sources.
2. Click the <Source> Properties option.

Working with Text

Inserting Date and Time in Sources

You can automatically insert the current date and time into:
- Documents
- Audio/Video transcripts
- Picture logs

To insert the date and time:
1. Open the required source in Detail View.
2. Click in required location for the date and time.
3. On the Format menu, click Insert.
4. Click Date/Time.

You can set the date and time format in the Display tab of Application Options. Refer to Setting Application Options for more information.

Inserting Symbols in Sources

You can use the Insert Symbol dialog box to enter special characters that are not on your keyboard. For example, you might want to insert Jefferson Transcript Notation characters in an interview transcript or picture log.

To insert symbols in a source:
1. Position the cursor in the required location.
2. On the **Format** menu, click the **Insert** option.
3. Click the **Symbol** option.
   - The **Insert Symbol** dialog box is displayed.
4. In the **Font** field, select the required font.
5. Click the box containing the symbol.
6. Click the **Insert** button.
7. Click **Close**.

**Inserting Images in Documents, Memos or Externals**

To insert an image into a document, memo or external:
1. Open the required source in **Detail View**.
2. Click in the required location.
3. On the **Format** menu, click **Insert**.
4. Click the **Image** option.
   - The **Insert Image** dialog box is displayed.
5. From the **Files of type** drop-down list select the format of the image. Only bitmaps (.bmp) and jpeg (.jpg, .jpeg) formats are supported.
6. Locate the required image.
7. Click **Open**.
   - The image is inserted in the source.
   - If required, you can code, annotate or add 'see also' links to images.

**A Quick Way To Do This**

**Copy and Paste:**
1. Copy an image (from web page or other source).
2. Position the cursor in the source.
3. On the **Edit** menu, click **Paste**.

**If you want to code or describe portions of an image, import the file as a picture source - refer to [Importing Pictures](#) for more information.**

**Changing Fonts and Colors**

You can apply a font style to text in:
- Documents
- Audio/Video transcripts (**Content** column only)
- Picture logs
You can choose from the set of fonts available in your system. Refer to Applying Styles to Text for information about using styles to apply fonts, colors and so on.

To change the font of selected text:
1. In **Detail View**, select the text you want to format.
2. On the **Format** menu, click **Font**.
   - The **Font** dialog box is displayed.
3. In the **Font** list, click the required font.
4. In the **Font Style** list, click the required format.
5. In the **Size** list, click the required point size.
6. In the **Effects** panel, check the boxes to apply **Underline** and/or **Strikeout** formatting to the font.
7. In the **Color** drop-down list, click the required color for the font.
8. In the **Script** drop-down list, select the required international script type.
   - You can preview your selections in the **Sample** box.

### A Quick Way To Do This

Choose a font from the **Edit** toolbar

### Aligning Text in Sources

You can apply paragraph alignment in:
- Documents
- Audio/Video transcripts
- Picture logs

To align paragraphs:
1. Open the required document in **Detail View**.
2. Click in the required paragraph.
3. On the **Format** menu, click **Paragraph Alignment**.
4. Click the required alignment option.

### A Quick Way To Do This

Use the alignment buttons on the **Edit** toolbar.

### Indenting Paragraphs

To indent a paragraph in a document:
1. Open the required document in **Detail View**.
2. Click in the required paragraph.
3. On the Format menu, click Indentation.
4. Click Increase Indent. To remove indents, click Decrease Indent.

A Quick Way To Do This

Use the increase and decrease indent buttons on the Edit toolbar.

You cannot indent text in video/audio transcripts or picture logs.

Working with Tables

You can create tables in a document, external or memo, or import a document or memo containing tables and work with them in NVivo. In the same way that you would code any other source content, you can also select and code the text or images in a table.

Inserting a table
1. Click in the required location.
2. On the Format menu, click Insert.
3. Click Text Table.
   The Insert Text Table dialog box is displayed.
4. Select the required number of rows and columns.
5. Click OK.

Inserting a row
1. Click in the row below the one you want to add.
2. On the Format menu, click Insert.
3. Click Row.

Inserting a column
1. Click in the column to the right of the one you want to add.
2. On the Format menu, click Insert.
3. Click Column.

Adjusting column width
Click and drag the column border to the required width.

Indenting a table
You will not be able to indent the full table at once. To indent the table, drag the left border on the first column.

Deleting a table
1. Click in the table.
2. On the Format menu, click Delete.
3. Click Text Table.
Deleting a row
1. Click in the row.
2. On the Format menu, click Delete.
3. Click Rows.

Deleting a column
1. Click in the column.
2. On the Format menu, click Delete.
3. Click Columns.

Selecting text in a table
Click and drag to select the required table text.

You can click and drag to select all the text in a specific row but not in a specific column.

Converting a table to text
1. Click in the table.
2. On the Format menu, click Convert.
3. Click Text Table to Text.
   The table is converted to tab-separated text.

Creating Lists
To create a bulleted list in a document:
1. Open the required source in Detail View.
2. Select the required paragraphs.
3. On the Format menu, click Bullets and Numbering.
4. Click Bulleted List. To remove the bulleted list format, click this option again.

To create a numbered list in a document:
1. Select the required paragraphs.
2. On the Format menu, click Bullets and Numbering.
3. Click Numbered List. To remove the numbered list format, click this option again.

You cannot create bulleted or numbered lists in video/audio transcripts or picture logs.

Use the List buttons on the Edit toolbar.
Selecting Text in Sources

When working with a source in **Detail View**, you can use the following methods for selecting text:
- Click and drag to select required text.
- Double-click to select a word.
- Triple-click to select a paragraph.
- On the **Edit** menu, click **Select All**.

Copying Text in Sources

You can copy and paste source text (and images) within a source or from one source to another. For example, you can copy text from a picture log into a document.

By default, the pasted text will include any formatting, coding, 'See Also' links or annotations. If you want to paste text without these defaults, you can use the **Paste Special** option.

**Copy Text with Default Options:**

1. In **Detail View**, select the required text.
2. On the **Edit** menu, click **Copy**.
3. Click where you want the text to appear.
4. On the **Edit** menu, click **Paste**.

**Main toolbar:**

1. Select the text you want to copy.
2. Click the **Copy** button:
3. Click the destination.
4. Click the **Paste** button.

**Right-click:**

1. Select the text you want to copy
2. Right-click and select **Copy**.
3. Click the destination.
4. Right-click and select **Paste**.

**Copy Text with Special Options:**

If required, you can copy content *excluding* its formatting, coding, 'See Also' links or annotations:

1. Select the required text.
2. On the **Edit** menu, click **Copy**.
3. Click where you want the text to appear.
4. On the **Edit** menu, click **Paste Special**.

   The **Paste Special Content** dialog box is displayed.
MOVING TEXT IN SOURCES

You can move source text (and images) within a source or from one source to another. For example, you can select text in a document and move it to a video transcript entry.

By default, the relocated text will include any formatting, coding, ‘see also’ links or annotations. If you want to move text without these defaults, you can use the Paste Special option.

Move Text with Default Options:

1. In Detail View select the required text.
2. On the Edit menu, click Cut.
3. Click where you want the text to appear.
4. On the Edit menu, click Paste.

Move Text with Special Options:

If required, you can move content excluding its formatting, coding, 'See Also' links or annotations:

1. Select the required text.
2. On the Edit menu, click Cut.
3. Click where you want the text to appear.
4. On the Edit menu, click Paste Special.
   The Paste Special Content dialog box is displayed.
5. Clear the required check boxes.
6. Click OK.
Applying Styles to Paragraphs

A paragraph style is a set of formatting characteristics that you can apply to a paragraph to quickly change its appearance. Using styles, you can apply a group of formats in one simple task. For example, instead of taking three separate steps to format your title as 16 pt, Arial and bold, you can achieve the same result in one step by applying the Title style.

To apply a style to paragraphs in a document:

1. Open the required document in Detail View.
2. Select or click in the paragraph you want to format.
3. On the Format menu, click Paragraph Style.
4. Click the required style.
   The style is applied to the paragraph.

You cannot apply a style to single characters or words within a paragraph—the selected style is applied to the whole paragraph.

Defining Paragraph Styles

You can define the paragraph styles for your project — for example; you can select a style and define its font, size and color. These styles apply to all new documents but are not applied to existing documents. Refer to Defining Paragraph Styles for more information.

When importing documents with paragraph styles already applied (using Microsoft Word), the styles are also imported and available for use in the imported document.

Auto Coding Based on Paragraph Styles

You can use paragraph styles to quickly code your documents. NVivo will automatically create nodes from the paragraphs in a selected style and code the text under the style at the node. Refer to Auto Code by Paragraph Style for more information.
Defining Paragraph Styles

**NVivo** provides the following default paragraph styles:

- **Title**
- **Heading 1** to **Heading 9**
- **Normal**
- **Plain text**

You can edit these styles or create new ones to suit your requirements.

This topic explains how to define paragraph styles in your current project. You can also define paragraph styles that will apply to all new projects — refer to [Setting Application Options](#) for more information.

You can use styles to quickly code structured documents— refer to [Auto Code by Paragraph Style](#) for more information.

**Editing Paragraph Styles**

To edit existing paragraph styles:

1. On the **File** menu, click **Project Properties**.
2. Click the **Paragraph Styles** tab.
3. Select the style you want to edit.
4. Set the required formatting.
5. Click the **Apply** button.

**Creating New Paragraph Styles**

1. On the **File** menu, click **Project Properties**.
2. Click the **Paragraph Styles** tab.
3. Click the **New Style** button.
4. In the **Name** field, enter a name for the style.
5. Set the required formatting.
6. Click the **Apply** button.

Changes to paragraph style settings are applied to *new* items, they do not impact existing project sources. To change the styles for existing sources you can use find and replace, refer to [Finding and Replacing Text in a Source](#) for more information.
Working with Audio and Video

About Audio and Video

A video or audio source consists of a media file and a transcript:

When you import an audio or video file, NVivo creates a new source containing the media and an ‘empty’ transcript.

Do I Need a Transcript?

Transcripts are optional. You can leave the transcript empty and hide it if required—on the View menu, click the Transcript option.

If you want to transcribe the media, you can enter or import the required content. For more information, refer to Importing Transcripts and Adding and Organizing Transcript Entries.

Coding Audio and Video

You can code the audio or video directly by clicking and dragging the mouse over a portion of the Timeline to select and code the required content—refer to Selecting Sections of a Media File for more information about selecting media. You can also code the text in the Content column of the transcript.

If you code the transcript, then the related timespan of media will be ‘shadow’ coded. Similarly, if you code the media, the corresponding transcript entries are also shadow coded.

Refer to Coding Video/Audio Sources for more information.
Storing the Media File

When you create a new audio or video source, you can choose to embed the media file in your project or set up a link to a media file on your computer or network.

Storing media outside of the project can be useful when you are dealing with many or very large media files —embedding large files can impact on project performance. Refer to Storing Audio and Video for more information.

Viewing Audio/Video Properties

You can change the name and description of your audio/video source. Depending on the file size, you can also choose to embed the media file within the project or store it externally in a folder in your hard drive.

To view Audio/Video Properties:
1. In List View, click on the source.
2. Click on the Project Menu.
   This will display the properties dialog.
4. In the General tab, you can view or change the Name and Description fields. You can also prevent any changes to the transcript by selecting Read-only.
5. In the Audio/Video tab, you can view the audio/video file properties:
   - Embedded in project - indicates that the media content is stored within the project (maximum size allowed for embedding is 40MB)
   - Not embedded—file location: - indicates that the media content is stored in a file outside the NVivo project
6. Click OK to save any changes, or Cancel to close the dialog box.

Playing Media Files

When working in audio/video sources, you can use options on the Media menu to play, pause and stop a media file.

You can also use Short Cut Keys or the Media toolbar:

Using the Media Controls

Play, pause and stop

Use the first two buttons on the Media toolbar to play and stop the media file. The Play button becomes a Pause button while an audio or video file is playing.
Fast forward and rewind

Use these buttons to:
- Rewind back to the start of the media file or to the start of the current selection.
- Rewind backwards through the media file.
- Fast forward through the media file.
- Fast forward to the end of the media file or to the end of the current selection.

Volume

Click the Mute button to turn the sound on or off.
Use the Volume slider to increase or decrease the volume of the media file.

Setting skip intervals

Use the Skip buttons to move backwards and forwards through a media file at set intervals.
To set the skip interval:
1. On the Tools menu, click Options.
The Application Options dialog box is displayed.
2. Click the Audio/Video tab.
3. In the Player Skip Interval field, enter the number of seconds required for the skip interval.

Adjusting the play speed

You can change the play speed— to slow when you are transcribing dialogue in detail or fast when you are scanning through a specific event in the media.
To adjust the speed for a media file:
1. Click in the required media file.
2. On the Media menu, click Play Speed.
3. Select the required option.
Use the play speed slider in the Media toolbar to finely adjust the speed for slow and fast modes. Note that some media files do not support speed adjustments.

Selecting media while playing

To select a section of a media file while the file is playing:
1. Play the media file to the point where you want to start selecting.
2. On the Media toolbar, click the Start Selection button.
3. Click the End Selection button where you want the selection to stop.
Refer to Selecting Sections of a Media File for more information.

Selecting the play mode

You can select from three play mode options available: Normal, Synchronize, and Transcribe. Refer to Navigating the Media and Transcript for more information.
To transcribe the media as you play:
1. On the Media menu, click Play Mode.
2. Click the Transcribe option.
As you play and then stop the media, transcript entries are automatically added and you can enter the required content.
Refer to Transcribe While Playing for more information.
Resizing the Video Display

When working in video sources, you can change the size of the video display:
1. Click in the video display area.
2. On the Media menu, click Video Size.
3. Select 100% to display the video at its full size.
   OR
   Select Fit to Player to resize the video so that it fits in the video display area—you can resize this area by dragging the border to the required location.

Selecting Sections of Media Files

When working in audio/video sources you can select sections of the media file for transcribing, playing, coding, linking, annotating and so on.

To select a section of a media file, click and drag the mouse over a section of the timeline:

![Timeline with selection highlighting]

Selecting media while playing

To select a section of a media file while the file is playing:
1. Play the media file or drag the playhead to the point where you want to start selecting.
2. On the Media toolbar, click the Start Selection button.
3. Click the Finish Selection button when you want to stop the selection:

![Media toolbar with selection buttons]

Selecting media to assign to a transcript row

To select a section of a media file to assign to an existing transcript row:
1. Click on an existing row.
2. Click and drag the mouse over the section of the timeline you want to select.
3. On the Media menu, click the Assign Timespan to Rows button.
   The timespan is displayed on the selected row.
To select a section of a media file to assign to a new transcript row:
1. Click and drag the mouse over the section of the timeline you want to select.
2. On the Format menu, click Insert and select Row.
   The new row will be inserted and displayed by order of timespan.

Importing Media Files into Sources

If required, you can create a video or audio source that does not contain a media file. This may be useful when you want to prepare the transcript first and import the media later.

To import a media file into an existing video or audio source:
1. Create a new video/audio source or open an existing source (one that does not contain a media file).
2. On the Media menu, click Import Media Content.
   The Open Media File dialog box is displayed.
3. Click the required file.
4. Click the Open button.

You cannot remove a media file from an audio or video source but you can change the location of a linked media file – refer to Embedding Audio and Video for more information.

You can also create a copy of an audio or video source and exclude the media file from the copied version.

Copying Audio and Video Sources

You can copy an audio or video source and paste it into an Internals folder.

When you copy the source, you can select to copy related information such as coding, transcript entries and links.

Include All Related Information

1. In Navigation View, click the Sources button.
2. Locate and click the required source from the Internals folders.
3. On the Edit menu, click Copy.
4. In Navigation View, click the Internals folder you want to copy into.
5. On the Edit menu, click Paste.

Include Selected Related Information

1. In Navigation View, click the Sources button.
2. Locate and click the required source from the Internals folders.
3. On the Edit menu, click Copy.
4. In Navigation View, click the Internals folder you want to copy into.
5. On the Edit menu, click Paste Special.
   The Paste Special Options dialog box is displayed.
6. Select the required options.
### Option | Select this option to...
--- | ---
**Paste as document** | Paste the video or audio transcript as a document source (excluding the media file). The transcript is formatted as a table in the new document but you can change the formatting as required.

**Media content** | Include the audio or video file in the copy.

**Transcript entries** | Include the transcript in the copy. If you choose to exclude the transcript, its related items (coding, links and so on) are also excluded.

**Memos** | Include any memo that has been linked to the source

**Annotations** | Include any annotations created in the source.

**See Also Links** | Include any See Also links that have been created in the source.

**Coding** | Include any coding that exists in the source.

**Relationships** | Include any relationships that have been defined for the source.

7. Click OK.

### Capturing Pictures from Videos

You can capture a still frame from a video and copy it as a new picture source or as an image in a document.

**Copy a frame as a new picture source:**

1. In **Navigation View**, click the **Sources** button.
2. Open the required video source.
3. Navigate to the required frame in the video.
4. Click in the video player.
5. On the **Edit** menu, click **Copy**.
6. In **Navigation View**, click on the **Internals** folder.
7. On the **Edit** menu, click **Paste**.

#### A Quick Way To Do This

**Right-click:**

1. In **Detail View**, right-click on the video frame required.
2. Click the **Copy** option.
3. In Navigation View, right-click on the folder where you want to create the new picture source.
4. Click the Paste option.

Copy a frame into a document

1. In Navigation View, click on the Sources button
2. Open the required video source.
3. Navigate to the required frame in the video.
4. Click in the video player.
5. On the Edit menu, click Copy.
7. Position the cursor in the required location.
8. On the Edit menu, click Paste.

Working with Transcripts

About Transcripts

When you import an audio or video file, NVivo creates a new source containing the media and an ‘empty’ transcript:

A transcript enables you to use text to describe the content of audio or video files. You can code the content of a transcript as you would any other document in NVivo. If you do not want to transcribe the media, you can leave the transcript blank and hide it if required—on the View menu, click the Transcript option.
Timespans

A timespan is the duration of time for a transcript entry. For example, Jane spoke about the new issues from the two minute point to the ten minute point (00:02:00-00:10:00). You can enter timespans directly into a transcript or you can have NVivo create them when you insert multiple transcript rows. You can also leave the timespan column blank. Refer to Adding and Organizing Transcript Entries for more information.

If required, you can enter multiple transcript entries with the same timespan.

Transcribe as You Play the Media

You can play an audio or video file and transcribe it as you go. As you play then stop the audio/video, a transcript entry is automatically added with the corresponding timespan and you can enter the required content. Refer to Transcribe While Playing for more information.

Importing Transcripts

You can also import transcripts that are in Word (.doc, .docx), text (.txt) or rich text (.rtf) format. The imported document can be in a table or paragraph format.

Adding Columns to Transcripts

You can change the transcript 'template' by adding custom columns. For example, you may want an extra column to identify the speaker in your audio sources. You can also auto code transcripts based on content in custom columns, refer to Auto Code by Transcript Column.

You cannot code or format the text in these custom columns. Refer to Adding Transcript Columns for more information.

Importing Transcripts

You can import transcript entries into audio or video sources. You can import an entire transcript or add entries to an existing transcript.

Transcripts can be in Word (.doc, .docx), rich text (.rtf), or text format (.txt).

When importing a transcript, you can choose to create transcript entries based on

- Timestamps
- Paragraphs
- Table Rows
- Tab-delimited or comma-delimited text files
Create Entries Based on Timestamps

If your transcript is made up of paragraphs prefaced by a timestamp:

1. Check that your document is formatted correctly. Timestamps must appear at the beginning of a paragraph.

   Timestamps must be in chronological order.

   If required you can use the hash symbol # surrounding a timestamp.

   You can also use brackets [ ] around a timestamp.

   - 0:02 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?

   - #0:18# 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?

   - [0:30] 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 working…?)

   - #0:38# Ten years from now? I don’t think that far ahead. I’ll probably be on the other end of the trolley by then! I hope to keep volunteering for as long as I can and I’ll always want to be involved in my kids’ and grandkids’ lives…not too involved though.

   In Word, it is a good idea to display paragraph marks (¶) so you can see where paragraphs end.

2. Check that your document has valid timestamps. What is a timestamp?

   A timestamp indicates at what point (second, minute, hour) a transcript entry occurred. For example—two minutes (00:02:00) into an interview, Jane said, "I don’t agree with the issues".

   When importing transcripts, you can create entries based on the timestamps in your document.

   You enter timestamps in the hh:mm:ss format—where hh = hours, mm = minutes, ss = seconds. You can leave out the colons if required—hhmmss.
NVivo will also recognize and convert short-hand ways of entering timestamps. This table shows some examples:

<table>
<thead>
<tr>
<th>Short-hand</th>
<th>Description</th>
<th>Converted to*</th>
</tr>
</thead>
<tbody>
<tr>
<td>75</td>
<td>75 seconds</td>
<td>00:01:15.0</td>
</tr>
<tr>
<td>1:6</td>
<td>1 minute and 6 seconds</td>
<td>00:01:06.0</td>
</tr>
<tr>
<td>9203</td>
<td>92 minutes and 3 seconds</td>
<td>01:32:03.0</td>
</tr>
<tr>
<td>85:2</td>
<td>85 minutes and 2 seconds</td>
<td>01:25:02.0</td>
</tr>
<tr>
<td>14532</td>
<td>1 hour, 45 minutes and 32 seconds</td>
<td>01:45:32.0</td>
</tr>
<tr>
<td>2:5:3</td>
<td>2 hours, 5 minutes and 3 seconds</td>
<td>02:05:03.0</td>
</tr>
</tbody>
</table>

*NVivo measures time up to the 10th of a second

3. In NVivo, open the video or audio source that you want to import transcript entries into.
4. On the Media menu, click Import Transcript Entries.
   The Import Transcript Entries dialog box is displayed.
5. Click the Browse button on the Import from field.
6. Locate and select the document containing the transcript table.
7. Click Open.
8. From the Create one transcript row for each drop down list, click Timestamp.
9. In the Import Data Preview box, review the data you are importing. It will display the first 10 rows of the transcript content you are importing as read by NVivo.
10. Click OK.
    The transcript will be imported.

Create Entries Based on Paragraphs

To import transcript entries based on the paragraphs in a Word document.

1. Check that your document is formatted correctly.

   NVivo creates a transcript entry for each paragraph

   On Thursday and Friday mornings I ‘do the trolley’ at Nazareth House, which is a home for the elderly. The rest of the time I cook and clean and potter in the garden. My son has separated from his wife and he is living with me for now, so I look after him too. 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.

   In Word, display paragraph marks so you can see where paragraphs end.

2. In NVivo, open the video or audio source that you want to import transcript entries into.
3. On the **Media** menu, click **Import Transcript Entries**. The **Import Transcript Entries** dialog box is displayed.
4. Click the **Browse** button on the **Import from** field.
5. Locate and select the document containing the transcript table.
6. Click **Open**.
7. From the **Create one transcript row for each** drop down list, click **Paragraph**.
8. In the **Import Data Preview** box, review the data you are importing. It will display the first 10 rows of the transcript content you are importing as read by NVivo.
9. Click **OK**.

   The transcript will be imported.

Soft returns or line breaks are considered the same as hard returns or paragraph marks and will be imported as separate rows.

Create Entries Based on Table Rows

To import transcript entries from a table in Word:

1. Check that your table has a column containing **valid timestamps or timespans**.

   **What is a timestamp?**

   A timestamp indicates at what point (second, minute, hour) a transcript entry occurred. For example—two minutes (00:02:00) into an interview, Jane said, "I don't agree with the issues". When importing transcripts, you can create entries based on the timestamps in your document.

   You enter timestamps in the hh:mm:ss format—where hh = hours, mm = minutes, ss = seconds. You can leave out the colons if required—hhmmss.

   NVivo will also recognize and convert short-hand ways of entering timestamps. This table shows some examples:

<table>
<thead>
<tr>
<th>Short-hand</th>
<th>Description</th>
<th>Converted to*</th>
</tr>
</thead>
<tbody>
<tr>
<td>75</td>
<td>75 seconds</td>
<td>00:01:15.0</td>
</tr>
<tr>
<td>1:6</td>
<td>1 minute and 6 seconds</td>
<td>00:01:06.0</td>
</tr>
<tr>
<td>9203</td>
<td>92 minutes and 3 seconds</td>
<td>01:32:03.0</td>
</tr>
<tr>
<td>85:2</td>
<td>85 minutes and 2 seconds</td>
<td>01:25:02.0</td>
</tr>
<tr>
<td>14532</td>
<td>1 hour, 45 minutes and 32 seconds</td>
<td>01:45:32.0</td>
</tr>
<tr>
<td>2:5:3</td>
<td>2 hours, 5 minutes and 3 seconds</td>
<td>02:05:03.0</td>
</tr>
</tbody>
</table>

   *NVivo measures time up to the 10th of a second

   If you get an error message indicating 'invalid timestamp', check that the import file is in the recommended format and the timestamps are in the correct sequence.
What is a timespan?
A timespan is the duration of time for a transcript entry. For example, Jane spoke about the new issues from the two minute point to the ten minute point (00:02:00.0-00:10:00.0). You can use a hyphen (-) or a forward slash (/) to indicate a timespan.

1. In NVivo, open the video or audio source that you want to import transcript entries into.
2. On the Media menu, click Import Transcript Entries.
   The Import Transcript Entries dialog box is displayed.
4. Click the Browse button on the Import from field.
5. Locate and select the document containing the transcript table.
6. From the Create one transcript row for each drop down list, click Table Row.
7. If the first column contains a numeric identifier, click File includes identifier column check box.
8. If the first row is used as a content header, click File includes header row check box.
9. In the Import Data Preview box, review the data you are importing. It will display the first 10 rows of the transcript content you are importing as read by NVivo.
10. In the Transcript Field Mappings, select a Transcript Field mapping option for each Import Data Field. Note that:
    - You must map one import field to Timespan
    - You must map one import field to Content
    - You can choose not to import a field by selecting (Do not import)
    - You can map to an existing custom transcript field in your project.
    - You can map to a new custom transcript field. If the import data file includes a header row, the header row field names will be available in the dropdown list of possible transcript fields. You can select these and optionally rename them.

   ![The new custom transcript field will be created and applied to all existing audio or video transcripts.](image)

11. To populate any blank cells in a specific transcript field with the contents of the preceding cell, select the corresponding Fill Down check box.
12. Click OK.
   The transcript will be imported.
Create Entries Based on Tab-Delimited or Comma-Delimited Text Files

To import transcript entries based on tab-delimited or comma-delimited txt files:

1. Check that your delimited file has **valid timestamps or timespans**

**What is a timestamp?**

A timestamp indicates at what point (second, minute, hour) a transcript entry occurred. For example—two minutes (00:02:00) into an interview, Jane said, "I don't agree with the issues". When importing transcripts, you can create entries based on the timestamps in your document.

You enter timestamps in the hh:mm:ss format— where hh = hours, mm = minutes, ss = seconds. You can leave out the colons if required—hhmmss.

NVivo will also recognize and convert short-hand ways of entering timestamps. This table shows some examples:

<table>
<thead>
<tr>
<th>Short-hand</th>
<th>Description</th>
<th>Converted to*</th>
</tr>
</thead>
<tbody>
<tr>
<td>75</td>
<td>75 seconds</td>
<td>00:01:15.0</td>
</tr>
<tr>
<td>1:6</td>
<td>1 minute and 6 seconds</td>
<td>00:01:06.0</td>
</tr>
<tr>
<td>9203</td>
<td>92 minutes and 3 seconds</td>
<td>01:32:03.0</td>
</tr>
<tr>
<td>85:2</td>
<td>85 minutes and 2 seconds</td>
<td>01:25:02.0</td>
</tr>
<tr>
<td>14532</td>
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<td>01:45:32.0</td>
</tr>
<tr>
<td>2:5:3</td>
<td>2 hours, 5 minutes and 3 seconds</td>
<td>02:05:03.0</td>
</tr>
</tbody>
</table>

*NVivo measures time up to the 10th of a second

If you get an error message indicating 'invalid timestamp', check that the import file is in the recommended format and the timestamps are in the correct sequence.

2. In **NVivo**, open the video or audio source that you want to import transcript entries into.
3. On the **Media** menu, click **Import Transcript Entries**. The **Import Transcript Entries** dialog box is displayed.
4. Click the **Browse** button on the **Import from** field.
5. Locate and select the document containing the transcript columns.
6. Click **Open**.
7. From the **Create one transcript row for each** drop down list, click **Tab Delimited Line** or **Comma Delimited Line**.
8. If your transcript has a header row, click **File includes header row** check box.
9. In the **Import Data Preview** box, review the data you are importing. It will display the first 10 rows of the transcript content you are importing as read by NVivo.
10. In the **Transcript Field Mappings**, select a **Transcript Field** mapping option for each **Import Data Field**. Note that:
You must map one import field to **Timespan**.

You must map one import field to **Content**.

You can choose not to import a field by selecting **(Do not import)**.

You can map to an existing custom transcript field in your project.

You can map to a new custom transcript field. If the import data file includes a header row, the header row field names will be available in the dropdown list of possible transcript fields. You can select these and optionally rename them.

The new custom transcript field will be created and applied to all existing audio or video transcripts.

11. To populate any blank cells in a specific transcript field with the contents of the preceding cell, select the corresponding **Fill Down** check box.

12. Click **OK**.

The transcript will be imported.

**Adding and Organizing Transcript Entries**

When working with audio/video sources, transcript entries enable you to record events against a particular timespan.

<table>
<thead>
<tr>
<th>Timespan</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>00:10 - 00:30</td>
<td></td>
</tr>
<tr>
<td>00:20 - 00:30</td>
<td></td>
</tr>
<tr>
<td>00:30 - 00:70</td>
<td></td>
</tr>
</tbody>
</table>

**Adding Entries to Your Transcript**

1. In an audio or video source, click in the transcript.
2. If required, click an existing entry to add an entry below it.
3. On the **Format** menu, click **Insert**.
4. Click the **Row** option.
   The entry is added and you can enter the required text in the **Content** column.

**Adding a transcript entry for a selected timespan**

1. Click and drag to select a timespan on the video/audio timeline:

2. On the **Format** menu, click Insert.
3. Click the **Row** option.
4. An entry with the selected timespan is added to the transcript.

**Adding multiple transcript entries**

1. In an audio or video source, click in the transcript.
2. On the **Format** menu, click Insert.
3. Click the **Rows** option.
   The **Add Transcript Entries** dialog box is displayed.
4. In the **Add transcript rows of duration field** enter duration of each entry—for example, enter **2:00** to create entries of two minutes duration.
5. In the **From start** time field, enter the start time for the transcript entries—for example, enter **00:00:00** to start adding entries from the start of the audio or video file.
6. In the **To end time field**, enter the end time of the final entry—for example, enter **00:03:00** to end the final entry at 3 minutes.
7. The entries are added and you can enter the required text in the **Content** column.

**Organizing Your Transcript Entries**

**Deleting transcript entries**

1. Click in the ID column of the row you want to delete. Click and drag to select multiple rows or hold down the **CTRL** key to select one row at a time.
2. On the **Edit** menu, click **Delete**.
3. Click **Yes** to confirm.

**A Quick Way To Do This**

**DELETE key**

1. Click in the left column of the row you want to delete.
2. Press the **DELETE** key.
3. Click **Yes** to confirm.

**Right-click:**

1. Right-click in the left column of the row you want to delete.
2. Click the **Delete** option.
3. Click **Yes** to confirm.
Re-ordering transcript entries for a timespan

If you have a multiple transcript entries against the same timespan, you can order the entries to suit your requirements.

To reorder transcript entries with the same timespan:

1. Open the required audio or video source.
2. Click in the left column to select the required transcript entry.
3. On the View toolbar, click the Move Up or Move Down button to move the selected entry.

You will not be able to reorder transcript entries if:
- a filter is on
- the rows are ordered by timespan
- coding stripes are on display
- the play mode is 'synchronized'

Copying transcript entries including coding, see also links and annotations

You can copy and paste a transcript entry within a transcript or across transcripts. You can also copy and paste a transcript entry into other internal, external or memo sources.

To copy a transcript entry with its coding, see also links and annotations:

1. Click in the ID column of the transcript entry you want to copy. Click and drag to select multiple rows or hold down the CTRL key to select one row at a time.
2. On the Edit menu, click Copy.
3. Click in the required location for paste (for example, a document or video/audio transcript).
4. On the Edit menu, click Paste. The transcript entry is copied along with any related coding, see also links and annotations.

Copying transcript entries excluding coding, see also links and annotations

1. Click in the ID column of the transcript entry you want to copy. Click and drag to select multiple rows or hold down the CTRL key to select one row at a time.
2. On the Edit menu, click Copy.
3. Click in the required location for paste (for example, a document or video/audio transcript).
4. On the Edit menu, click Paste Special. The Paste Special Content dialog box is displayed.
5. Clear the check boxes for the content you do not want to paste.
6. Click OK.
Merging transcript entries

When working with video/audio transcripts, you can merge two or more selected transcript entries into a single transcript entry.

For example

Original transcript entries...

<table>
<thead>
<tr>
<th>Time</th>
<th>Transcript</th>
</tr>
</thead>
<tbody>
<tr>
<td>0:00-0:20</td>
<td>Volunteering is about making a meaningful difference to a particular cause, or an organization or a person.</td>
</tr>
<tr>
<td>0:20-0:30</td>
<td>I regularly help with fundraising events and wish granting activities.</td>
</tr>
<tr>
<td>0:30-0:40</td>
<td>The experience of granting a wish is extremely rewarding and really brings you back to earth.</td>
</tr>
</tbody>
</table>

...merged into one transcript entry:

<table>
<thead>
<tr>
<th>Time</th>
<th>Transcript</th>
</tr>
</thead>
<tbody>
<tr>
<td>0:00-0:40</td>
<td>Volunteering is about making a meaningful difference to a particular cause, or an organization or a person. I regularly help with fundraising events and wish granting activities. The experience of granting a wish is extremely rewarding and really brings you back to earth.</td>
</tr>
</tbody>
</table>

To merge transcript entries:
1. Click and drag in the ID column to select multiple transcript entries. Hold down the CTRL key to select individual entries.
2. On the Format menu, click Merge.
3. Click the Rows option.

The selected rows are merged.

Adding Custom Columns to Transcripts

If you want to capture extra information about audio or video files, you can add columns to the transcript template. For example, you might create custom columns to capture participant names and roles. You can also auto code transcripts using the content in custom columns—refer to Auto Code by Transcript Column.
Adding and Organizing Custom Columns

Adding/removing custom columns to transcripts in a project

1. On the File menu, click Project Properties.
   The Project Properties dialog box is displayed.
2. Click the Audio/Video tab.
3. In Custom Transcript Fields, click the Audio or Video tab.
4. Click the New button.
5. Enter a name for the new column. You can rename the column anytime.
6. Click the Apply button.
   Each custom column that you add in Project Properties is added to all transcripts in your project.

When you remove custom columns, it will apply to all transcripts in your project. To do this, select the required column and click Remove.

Setting custom columns for all new projects

1. On the Tools menu, click Options.
2. In the Audio/Video tab, add the required columns.

Reordering custom columns in transcripts

1. On the File menu, click Project Properties.
   The Project Properties dialog box is displayed.
2. Click the Audio/Video tab.
3. In Custom Transcript Fields, click the Audio or Video tab.
4. Select the column you want to move.
5. Click the Move Up or Move Down button to move the column to the required position.
6. Click OK.

The content in custom columns is plain text— you cannot apply formatting, code, annotate, link or retrieve the content in queries.

You cannot rename, add or remove custom columns in an individual audio or video source— custom columns are applied to all video or audio sources. If you rename, add or remove a custom column from Project Properties, any data in the column will be changed or lost and the change will apply to all audio or video sources in the current project.

Navigating the Media and Transcript

When working with audio/video sources, you can choose the level of interaction between the media file and its transcript.

For example:

- You can play the media without affecting the transcript, or you can have the transcript scrolling in synch with the media playback.
You can select transcript entries without selecting media or you can select media via the transcript.

Scrolling the Transcript and the Movie

You can keep the video and transcript in synch—as you play the video the transcript scrolls too:
1. On the Media menu, click Play Mode.
2. Click the Synchronize option.

Selecting Media Using the Transcript

You can select a section of your media file by clicking the associated transcript entry:
1. On the Media menu, click the Select Media from Transcript option.
2. In the transcript, select the required transcript entry.
   
   The associated portion of the media is selected—you can see the selection in the timeline:

   ![Timeline Image]

   Similarly, if you select a portion of the timeline the associated transcript entries are selected.

Playing Selected Transcript Entries

1. On the Media menu, click the Select Media from Transcript option.
2. In the transcript, select the required transcript entry.
3. On the Media menu, click Play.

Transcribe While Playing

You can transcribe an audio or video file while playing it in ‘transcribe’ mode. You can play, pause and then play some more, transcribing as you listen. Each time you stop the media a new transcript row is added.

To transcribe an audio or video file:
1. Open the required video or audio source.
2. On the Media menu, click Play Mode.
3. Click the Transcribe option—you are now in Transcribe mode.
4. On the Media menu, click Play Speed, and then select your preferred play speed for transcribing. You can also adjust the play speed using the slider on the Media toolbar.
5. On the Media toolbar, click the Play button. A transcript entry is added with the starting time in the Timespan field.
6. Enter the required content. You can pause and rewind if required.
7. Press the Stop button when you have completed the entry. The end time is added to the Timespan field.
8. Continue until you have transcribed the required content.
9. Turn-off transcribe mode—on the Media menu, click Play Mode > Normal.

You can activate the 'Skip back on play in transcribe mode' function. When you are in transcribe mode, the media player skips back when you select Play after Pause—refer to Setting Application Options (Audio/Video tab) for more information.

Filtering Transcripts

Filtering is a quick and easy way to find and work with a subset of the data in your transcript. By applying a filter to a column you can temporarily hide the rows that you are not interested in.

For example, you could apply a filter to the timespan column to view only the transcript entries between 3:00 and 5:00 minutes.

Applying a filter to the timespan column

1. Click on the filter button in the Timespan column header. The Filter Transcript Rows dialog box is displayed.
2. From the drop-down list, select whether you want to show or hide rows based on the selected timespan criteria.
3. Select the required criteria from the next drop-down list. For example, show all rows that start after a selected timespan.
4. Enter the timespan in the field. For example, show all rows that start after 00:03:00.
5. If required, enter more criteria and another timespan. For example, show all rows that start after 00:03:00 and end before 00:05:00.
6. Click OK to apply the filter. The Filter button is displayed in red to indicate a filter has been applied.

Applying a filter to the Content or custom columns

1. Click on the filter button in the Content or a custom column header. The Filter Transcript Rows dialog box is displayed.
2. Select the required options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show/Hide Rows</td>
<td>Show or hide rows based on selected criteria.</td>
</tr>
<tr>
<td>Where value in column</td>
<td>This read-only field displays the name of the column you are working with.</td>
</tr>
</tbody>
</table>
is blank

A cell in the selected column might be blank. For example, you may have a timespan without any recorded content. You can choose to show/hide transcript entries that have no content in the selected column.

For example, show only transcript entries that have no data recorded in the **Content** column.

is not blank

Show or hide transcript entries where the content in the selected column is not blank.

For example, show only transcript entries with data recorded in the **Content** column.

equals

Show or hide transcript entries where the content in the selected column matches the content you enter in the field.

For example, show only transcript entries where the data in the **Content** column is 'tense silence'.

contains

Show or hide transcript entries where the content in the selected column contains the text you enter in the field.

For example, show only transcript entries where the data in the **Content** column contains the word 'community'.

contains any of

Show or hide transcript entries where the content in the selected column contains any of the comma-separated words you enter in the field.

For example, show only transcript entries where the content in the **Content** column contains 'community, society, people'.

3. Click **OK** to apply the filter.

   The **Filter** button ◆ is displayed in red to indicate a filter has been applied.

   For more information about custom columns, refer to [Adding Custom Columns to Transcripts](#).

   **Refining a Filter**

   If you have applied a filter to a column, you can refine it further by clicking the filter button ◆ and specifying more criteria.

   **Clearing Filters**

   To remove the filter on a column or row:
   1. Click in the column header to select the required column.
   2. On the **View** menu, click **Column** or **Row**.
   3. Click the **Clear Filter on Column** or **Show All & Clear Filter** (for rows) option.

   All the transcript entries for the column or rows are displayed.
A Quick Way To Do This

1. Click on the filter button \( \vee \) in the column header. The *Filter Transcript Rows* dialog box is displayed.
2. Click **Clear Filter**.

Sorting Transcripts

You can sort transcripts by timespan or by the content in custom columns. Refer to *Adding Custom Columns to Transcripts* for more information about working with custom columns.

To Sort a Transcript by Timespan:

1. In an audio or video source click in the transcript.
2. On the **View** menu, click **Sort By**.
3. Click the **Timespan** option to order the transcript from the earliest timespan to the latest. Click this option again to reverse the order.

To Sort a Transcript by the Content in a Custom Column:

1. In an audio or video source, click in the transcript.
2. On the **View** menu, click **Sort By**.
3. Click the column name you want to sort by.

You cannot sort a transcript by the text in the **Content** column.

Hiding Transcripts

When working with audio/video sources, you can choose to hide the transcript —this is useful when you do not require a transcript or when you want more room to see the media file.

To hide the transcript:

1. On the **View** menu, select **Transcript**.
2. Select **Hide**.

To show a hidden transcript:

1. On the **View** menu, select **Transcript**.
2. Select **Right**.
Showing and Hiding Custom Transcript Columns

You can hide the custom columns that you create in audio or video sources.

To hide selected custom columns:
1. In an audio or video source, click on the transcript column header for the column you want to hide. Click and drag to select multiple columns or hold down the CTRL key to select one column at a time.
2. On the View menu, click Column.
3. Click the Hide option.

To show all custom columns:
1. In an audio or video source, click in a transcript column header.
2. On the View menu, click Column.
3. Click the Show All option.

Converting Transcripts into Documents

You may want to create a copy of a transcript as a document source if you want to

- Work with the transcript but no longer require the media file
- Code the content in custom transcript columns—refer to Adding Custom Columns in Transcripts for more information.

To convert a video or audio transcript into a document:
1. In Navigation View, click the Sources button.
2. In List View, click the video or audio source that you want to convert.
3. On the Edit menu, click Copy.
4. In Navigation View, click the Internals folder you want to copy into.
5. Click in the List View.
6. On the Edit menu, click Paste Special.
   The Paste Special Options dialog box is displayed.
7. Select the Paste as document check box.
8. Select the required options.
9. Click OK.
Storing Audio and Video Files

Storing Audio and Video

The audio or video source consists of a media file and (optionally) a transcript. The media file can be:

- Embedded within your project; or
- Not embedded in your project—NVivo records the file location

No matter where you choose to store the file, you can still code, annotate and work with the source in the same way.

Benefits of Embedding Media Files

Media files embedded in a project become part of the project—if you move your project file (.nvp), the embedded media files go too.

Media files stored outside of your project are referenced within the project but are not part of it—if you send your project to a colleague you will need to include the media files separately.

Also, if you move externally stored media files to a new location (using the Windows file system), you will need to update the location in your NVivo project. Refer to Moving Media Files for more information.

Why Store Media Files Externally?

Embedding large media files (over 20MB) may impact on the performance of your NVivo project.

If you store large media files externally, you can analyze as much media as your computer can accommodate—without jeopardizing project performance.

Alternatively, you can store your media files on a network server. Note: When you are not connected to the server you cannot access the media content, but—if you choose to 'work disconnected'—you can still open the audio or video source and work with the transcript. Refer to Working without Your Media Content for more information.

Select the File Storage Option for an Audio or Video Source

To choose whether a selected media file is embedded or stored externally:

1. In Navigation View, click the Internals folder.
2. In List View, click the required source.
3. On the Project menu, click <Audio/Video> Properties. Option name depends on the type of media you have selected.
   The <Audio/Video> Properties dialog box is displayed.
4. Click the <Audio/Video> tab.
5. If the media content is stored in a file outside NVivo and you want to embed it within the NVivo project, click the Embedded in project option.
6. If the media content is already embedded within NVivo and you want to store it in a file outside of the project, click Not embedded—file location.
7. Click **Browse** to select a folder to store a previously embedded file in, or select a file to store its path in the source.

8. Click **OK**.

### Setting Import Options for Storing Files

You can define options that determine how imported media files are stored. You can choose to:

- Embed files under a specified file size within the project; or
- Not embed any files within the project

When media files are not embedded within the project, the file location is recorded in **NVivo**. Refer to [Importing Audio and Video](#) for more information.

The storage options are applied to all *new* files that you import, they are not applied to those that have already been imported.

To set storage options for media files:

1. On the **Tools** menu, click **Options**.
   
   The **Application Options** dialog box is displayed.

2. Click the **Audio/Video** tab.

3. To not embed any media files within the project, clear the check box: **Embed media in project if file size less than**.

4. To automatically embed media files that are under a specified size, select the check box and enter the maximum size (up to 40MB).

If your project includes media files that are not embedded and the files are moved or deleted, you will need to update the file location in the audio/video source. Refer to [Moving Media Files](#) for details.

You can view all media files stored outside of the project in the **All Sources Not Embedded** folder. Refer to [Using Search Folders](#) for more information.

### Listing Media Files

To see a list of all the media files that are not embedded within your **NVivo** project:

In **Navigation View**, click on the **All Sources Not Embedded** folder.

In **List View** you can see the following information:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the source containing the media file.</td>
</tr>
<tr>
<td>In Folder</td>
<td>The folder (in <strong>Navigation View</strong>) that contains the source.</td>
</tr>
</tbody>
</table>
Path  The external location of the media file.

Size (MB)  The size (in Megabytes) of the media file.

Available  A check mark in this column indicates that the correct file is currently available in the specified location. If you move the file (using your Windows file system) then a check mark will not appear. You can open the source but you cannot play the media.

Created  The date the source was created.

Modified  The date the source was last modified.

Created By  The user who created the source.

Modified By  The user who last modified the source.

Moving Media Files

You will need to update NVivo when you change the location of media files not embedded within the project. You can see which audio/video sources have media files stored externally by clicking on All Sources Not Embedded in Navigation View.

Updating File Location

1. In List View, select the audio or video source you want to update.
2. On the Project menu, click Update File Location. The Update File Location dialog box is displayed.
3. Use the Look in drop-down list to find the new Windows location.
4. Select the required audio or video file.
5. Click the Open button. NVivo checks that the audio or video file has the same content as the original file.

Pointing to a New Directory (for Multiple Files)

If you have moved a number of media files to a new directory:

1. In Navigation View, click the All Sources Not Embedded folder.
2. In List View, select the required files.
3. On the Project menu, click Update File Location.
The Browse for Folder dialog box is displayed.

4. Click the required folder.
5. Click OK.

NVivo checks that the audio/video files in the new directory have the same name and content as the original files.

Working Without Your Media Content

If you choose to store media files outside your NVivo project, such as on a CD or a network server, you can only access media content when you have the CD or when you are connected to the network. If you do not have the CD with you at the time of access or are disconnected from your network, you cannot play the media content, but you can still open your audio and video sources and work with the transcripts.

To work without the media CD or to work disconnected from your network server:

1. Select the required audio or video source with the media file.
2. Double-click to open the media source.
   The error message 'could not open media file for this source' is displayed.
3. Select Work disconnected
4. To choose to 'work disconnected' for any other inaccessible media files during this session, select the Remember this for current NVivo session check box.
   The audio or video source is opened in Detail View and you can work with the transcript.
Working with Pictures

About Picture Sources

An NVivo picture source consists of a picture and a log:

You can create new picture sources by:

- Importing a picture file
- Copying all/part of another picture in your project
- Copying a frame from a video in your project

When you create a new picture source, the log is empty. You can use the log to record notes about the picture. The notes can relate to the entire picture or a selected region of the picture. For more information, refer to Working with Log Entries.

Do I Need a Log?

No, you can leave the log empty and hide it if required by clicking Log on the View menu.

Coding Pictures

You can code the entire picture source, a selected region of the picture or a log entry. Click and drag the mouse to select a picture region, a portion of the text or selected rows in log entries. If you code a log entry, then the related region of the picture will be ‘shadow’ coded and vice versa.

For more information, refer to Coding an Entire Source or Coding Picture Sources.

Viewing Picture Properties

The Picture Properties dialog displays the picture dimensions or size in pixels, as well as the number of log entries created for the picture. Some picture files, such as digital photos, may contain additional properties such as Artist, camera make and the date/time the photo was taken.
To view **Picture Properties**:
1. In **List View**, click on the source.
2. Click on the **Project Menu**.
3. Select **Picture Properties**.

   The Picture Properties dialog box is displayed:

   - In the **General** tab, you can view or change the **Name** and **Description** fields. You can also prevent any changes to the file by selecting the **Read-only** check box, or enable changes by clearing it. The read-only function will allow coding and uncoding actions, but will not allow changes to picture resolutions or adding/changing of log entries.

   - In the **Picture** tab, you can view the picture properties. The columns can be sorted but the information is for viewing only and cannot be changed.

4. Click **Ok** to save any changes, or **Cancel** to close the dialog box.

---

**Copy All picture files are converted to JPEG format when they are imported as picture sources. The files also retain this format when they are exported out of NVivo.**

---

**Copying Pictures**

To create new picture sources, you can copy images from any Windows application, including from open **NVivo** documents, or you can copy picture regions from existing picture sources. You can also copy a frame from a video source and paste it as a picture source. Refer to Capturing Pictures from Videos for more details.

When copying a picture, all related information such as coding and links are automatically included. But if required, you can also choose to include only selected information.

**Include All Related Information:**

1. Select the image in the document to copy.
   
   OR
   
   From the open picture source, drag the cursor to select a region of the picture to copy.

2. From the **Edit** menu, click **Copy**.

3. Click on a folder where you want to create the new picture source.

4. On the **Edit** menu, click **Paste**.

5. In the **New Picture** dialog box, enter a name and description for the new source.

6. Select **Read Only** if you want the log entries for the new source to be uneditable.

7. Click **OK**.
Main toolbar:
1. Select the image or picture you want to copy.
2. Click the Copy button:
3. Click on the destination folder.
4. Click the Paste button.

Right-click:
1. Select the image or picture you want to copy
2. Right-click and select Copy.
3. Click the destination folder.
4. Right-click and select Paste.

Include Selected Related Information:
1. Select the image in the document to copy.
   OR
   From the open picture source, drag the cursor to select a region of the picture to copy.
2. On the Edit menu, click Copy.
3. Click on the folder where you want to create the new picture source.
4. On the Edit menu, click Paste Special.
   The Paste Special Content dialog box is displayed.
5. By default, all related items are pre-selected. Clear the check boxes of the items you do not want to include.
6. Click OK.

Rotating Pictures
When working with a picture source, you can rotate pictures at 90 degree angles clockwise or counter-clockwise.
To do this:
1. Open the required picture source in Detail View.
2. Click on the picture.
3. In the Picture menu, click Rotate.
4. Select the required rotation.
Compressing Pictures

You can adjust the compression of the picture in a picture source. This is a useful tool in reducing the overall size of the file while retaining an acceptable quality.

To compress a picture:
1. Open the required picture source in **Detail View**.
2. On the **Picture** menu, select **Compress**.
   
   The **Picture Compression** dialog box is displayed.
3. Use the slider to adjust the compression. Note that the greater the compression, the lower the quality of the picture.
4. Compare the **New Size** against the **Current Size** to see the change in file size.
5. Check the quality of the preview image provided for the effects of the change in compression.
6. Once you are satisfied with the change in file size and picture quality, click **OK**.

Once you have compressed a picture, you can revert back to its original setting using the **Undo** button in the **Edit** menu. You can only undo the last 5 changes made since you last saved your project. Once you save the project, your changes are locked in.

Adjusting Brightness and Contrast

To adjust the brightness and contrast levels of a picture in a picture source:
1. Open the required picture source in **Detail View**.
2. On the **Picture** menu, select **Brightness & Contrast**.
   
   The **Brightness and Contrast** dialog box is displayed.
3. Use the sliders to adjust the levels.
4. Check the effect on the preview image provided. You can click **Reset** to go back to the original settings.
5. Once you are satisfied with the adjustments, click **OK**.

Once you have adjusted the brightness and contrast levels of a picture, you can revert back to its original setting using the **Undo** button in the **Edit** menu. You can only undo the last 5 changes made since you last saved your project. Once you save the project, your changes are locked in.

Adjusting Picture Region Shading

When you code a portion of a picture, link it to another item or create an annotation for it, the selected portions are shaded in yellow, red or blue. This may make it difficult to view the portions of the picture underneath the shadings. You can adjust the shading density without losing the coding or link information.

To adjust the shading density of the picture region:
1. Open the required picture source in **Detail View**.
2. In the **View** menu, click on **Region Shading**.
3. Select the option required. You can choose from **None**, **Light**, **Medium** or **Dark**.

   The shaded regions of the picture will immediately display the effect of the option chosen. Note that the setting applies to ALL the regions shaded within the picture.
The setting for the region shading is not saved. If you close the current NVivo session and open a new session, the shading resets to the default Dark option.

A Quick Way To Do This

You can quickly adjust the picture region shadings by using the shading slider in the View toolbar:

Working with Log Entries

In a picture source, you can add notes, ideas or comments to describe the whole or part of an image—these are referred to as Log entries. If you have notes about the image in a document or text file stored outside NVivo, you can also import these into the picture source — refer to Importing Log Entries for more information.

Like other text entries, log entries can be edited, coded or linked for later interpretation. Refer to Coding Picture Sources for more information.

To enter a log entry for the whole picture:
1. In the open picture source, click on a cell in the Content column.
2. Enter your notes or comments.

To enter a log entry for a selected region of a picture:
1. In the open picture source, click and drag to select a region of the picture.
2. On the Format menu, click Insert and select Row.
   The region coordinates will be set and the cursor will automatically move to the Content column so you can enter a log.

To assign a selected region of the picture to an existing log entry:
1. In the open picture source, click and drag the cursor on the picture to select a region.
2. Click a cell in the Region column where you want to enter the selected region.
3. On the Picture menu, click Assign Region to Rows.
   The corresponding region coordinates will be displayed.
4. Click on the Content cell and enter your notes or comments.

Adjust the current region by dragging the handles and clicking Assign Region to Rows again on the Picture menu. Make sure the mouse cursor is on the relevant Region cell to change the coordinates.
To hide/unhide log entries:
1. Open the required source.
2. In the View menu, click Log.

To delete log entries:
1. Open the required source.
2. Click on the row number to select the whole row.
3. In the Edit menu, click Delete.

To move log entry rows up or down:
1. Open the required source.
2. Click on the row number to select the whole row.
3. In the View menu, click Row.
4. Select Move Up or Move Down.

A Quick Way To Do This

View toolbar:
1. Select the row you want to move.
2. Click the Move Up or Move Down button:

You will not be able to move log entry rows if a filter is on. In the View menu, click Row and select Show All & Clear Filter.

Importing Log Entries

You can import log entries into picture sources. You can import an entire picture log or add entries to an existing log.

Log entries can be in Word (.doc, .docx), rich text (.rtf), or text format (.txt).

When importing a picture log, a line in a text file or a paragraph in a document file will be imported as one log entry and placed as a row in the Content column. If there are existing entries in the picture source, the imported log entries will be positioned after the last existing entry.

To import log entries:
1. In NVivo, open the picture source that you want to import log entries into.
2. On the Picture menu, click Import Picture Log Entries.
3. In the **Open** dialog box, locate and select the document or text file containing the log entries.

4. Click **Open**.

   If there are existing entries in the source, a message will pop up to confirm if you want to proceed with the import. Click **OK** to confirm.

   The log entries will be displayed in the **Content** column.

---

**Log entries in table format will become disjointed upon import. You will need to reformat the table into paragraph form to ensure a successful import.**

---

**Making a Picture Gallery**

You can use sets to organize and display your picture sources—this is useful when you want to preview your pictures in sequence.

To make a picture 'gallery':

- Create a new set from selected pictures
- Re-order items in the set
- Preview the set as thumbnails

**Create a new set from selected pictures:**

1. In **Navigation View**, click the folder containing the pictures you want to include.
2. In **List View**, select the required pictures. Hold down the CTRL key and click to select multiple pictures or SHIFT to select a range of pictures.
3. On the **Project** menu, click the **Create As** option.
4. Click the **Create As Set** option.
5. Name and describe the new set.
6. Click **OK**.

**Re-order items in the set:**

1. In **Navigation View**, click **Sets**.
2. Click on the new set. The pictures are displayed in **List View**.
3. On the **View** toolbar, click the **Sort by Custom** button. The **Move Up** and **Move Down** buttons are enabled.
4. In **List View**, select the required picture and use the **Move Up** and **Move Down** buttons to move it to the required position.

**Preview the set as thumbnails:**

1. Click in the **List View** for the set.
2. On the **View** menu, click **List View**.
3. Click the required thumbnail option.
**Exporting Sources**

**Exporting Documents, Memos and Externals**

You can export documents, memos or externals to HTML so that you can open them in your web browser. You can choose to include annotations and other related content. This can be useful if you want to share a source with someone who does not have NVivo.

You can also export a document, memo or external to PDF, a text file or a Microsoft Word document.

To export a document, memo or external:

1. In the **List View**, select the item you want to export.
2. On the **Project** menu, click **Export <Item>** (the option changes depending on the type of project item you are working with).
   
The **Export Options** dialog box is displayed.
3. Select the required options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Include the project item name.</td>
</tr>
<tr>
<td>Format</td>
<td>If you choose to include the name, you can select the required format.</td>
</tr>
<tr>
<td>Description</td>
<td>Include the description as defined in the source properties.</td>
</tr>
<tr>
<td>Other Properties</td>
<td>Include other source properties such as Location, Size, Created By or Modified By.</td>
</tr>
<tr>
<td>Annotations</td>
<td>Annotated text is highlighted and numbered. The text of the annotation is displayed under the heading Annotations.</td>
</tr>
<tr>
<td>See Also Links</td>
<td>'See also' links are identified by superscript roman numerals (i). The destination of the link is displayed under the heading See Also Links.</td>
</tr>
<tr>
<td>Relationships</td>
<td>The items to which the source is related are displayed under the heading Relationships.</td>
</tr>
<tr>
<td>Memo Links</td>
<td>If the source is linked to a memo, the memo is listed under the heading Linked Memo.</td>
</tr>
</tbody>
</table>
Paragraph numbers
Select this option to display the paragraph number beside each paragraph.

Open on Export
Select this option, if you want the exported file to open automatically when the export has completed.

4. Click OK.
   The Save As dialog box is displayed.
5. In the Save in list, select the destination for the exported file.
6. In the File name field, enter a name for the exported file.
7. In the Save as type field, select the format for the exported file.
8. Click Save.

You can also select multiple items to export. Read more
Select multiple items for export by holding down either the SHIFT key for a range of items or CTRL key for non-consecutive items, as you click with your mouse.

When you export multiple items, all the items will be exported to the same file type. You will need to select the file type, and then choose the folder to store the exported files.

Right-click:
1. In List View, right-click the document, memo or external.
2. Click the Export option.
3. Click the Export <Item> option (the option changes depending on the type of project item you have selected).

Exporting Audio and Video Sources

You can export audio and video sources to HTML so that you can open them in your web browser. You can play the media from the web page and view any transcript entries. You can choose to include annotations and other related content. This can be useful if you want to share a media source with someone who does not have NVivo.

You can also choose to export only the audio or video file as a media file, or export only the transcript to PDF, a text file or a Microsoft Word document.

To export an audio or video source:
1. In the List View, select the required audio or video source.
2. On the Project menu, click Export Audio/Transcript or Export Video/Transcript.
   The Export Options dialog box is displayed.
3. Select the required options.
### Option Description

**Export**
You can choose to export:

- **Entire content:** Exports the media file and the transcript to HTML so you can view the exported source in your web browser. If you select this option you can choose to include annotations and other related content.

- **Media item:** Exports only the audio or video file in the same format that was originally imported (mp3, wav, avi and so on).

- **Transcript:** Exports only the transcript as a document (.txt, .doc, .docx, .rtf or .pdf).

**Name**
Include the project item name.
This option is only available when you choose to export the entire content or the transcript.

**Format**
If you choose to include the name, you can select the required format.

**Description**
Include the description as defined in the source properties.
This option is only available when you choose to export the entire content or the transcript.

**Other Properties**
Include other source properties such as **Location**, **Size**, **Duration**, **Format**, **Created By** or **Modified By**.
This option is only available when you choose to export the entire content or the transcript.

**Annotations**
Annotated text is highlighted and numbered. The text of the annotation is displayed under the heading **Annotations**.
This option is only available when you select to export the entire content.
See Also Links

‘See also’ links are identified by superscript roman numerals (i). The destination of the link is displayed under the heading **See Also Links**.

This option is only available when you select to export the entire content.

Relationships

The items to which the source is related are displayed under the heading **Relationships**.

This option is only available when you select to export the entire content.

Memo Links

If the source is linked to a memo, the memo is listed under the heading **Linked Memo**.

This option is only available when you select to export the entire content.

Open on Export

Select this option, if you want the exported file to open automatically when the export has completed.

4. Click **OK**. The **Save As** dialog box is displayed.

5. In the **Save in** list, select the destination for the exported file.

6. In the **File name** field, enter a name for the exported source.

7. In the **Save as type** field, select the format for the exported item.

8. Click **Save**.

You can also select multiple items to export. **Read more**

Select multiple items for export by holding down either the **SHIFT** key for a range of items or **CTRL** key for non-consecutive items, as you click with your mouse.

When you export multiple items, all the items will be exported to the same file type. You will need to select the file type, and then choose the folder to store the exported files.

---

If you use Microsoft Internet Explorer to view an audio or video source exported to HTML, you may be asked to allow ActiveX controls. Refer to Microsoft Internet Explorer help for details.
Exporting Picture Sources

You can export a picture source to HTML so you can open it in your web browser. You can choose to include annotations and other related content. This can be useful if you want to share a picture source with someone who does not have NVivo.

You can also choose to export only the picture to JPEG or only the log to PDF, a text file or a Microsoft Word document.

To export a picture source:
1. In the List View, select the required picture source.
2. On the Project menu, click Export Picture/Log.
   The Export Options dialog box is displayed.
3. Select the required options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export</td>
<td>You can choose to export:</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Entire content</strong>: Exports the picture and the picture log to HTML so that you can view the exported source in a web browser. If you select this option you can choose to include annotations and other related content.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Picture</strong>: Exports only the picture as a .jpeg file.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Log</strong>: Exports only the picture log as a document (.txt, .doc, .docx, .rtf or .pdf).</td>
</tr>
<tr>
<td>Name</td>
<td>Include the project item name. This option is only available when you choose to export the entire content or the log.</td>
</tr>
<tr>
<td>Format</td>
<td>If you choose to include the name, you can select the required format.</td>
</tr>
<tr>
<td>Description</td>
<td>Include the description as defined in the source properties. This option is only available when you choose to export the entire content or the log.</td>
</tr>
</tbody>
</table>
| Other Properties | Include other source properties such as Location, Size, Created By, Modified By, Dimensions and various picture specifications. 
This option is only available when you choose to export the entire content or the log. |
|------------------|-----------------------------------------------------------------------------------|
| Annotations      | Annotated text is highlighted and numbered. The text of the annotation is displayed under the heading Annotations. 
This option is only available when you select to export the entire content. |
| See Also Links   | ‘See also’ links are identified by superscript roman numerals (i). The destination of the link is displayed under the heading See Also Links. 
This option is only available when you select to export the entire content. |
| Relationships    | The items to which the source is related are displayed under the heading Relationships. 
This option is only available when you select to export the entire content. |
| Memo Links       | If the source is linked to a memo, the memo is listed under the heading Linked Memo. 
This option is only available when you select to export the entire content. |
| Open on Export   | Select this option, if you want the exported file to open automatically when the export has completed. |

4. Click **OK**.

   The **Save As** dialog box is displayed.

5. In the **Save in** list, select the destination for the exported file.

6. In the **File name** field, enter a name for the exported file.

7. In the **Save as type** field, select the format for the exported file.

8. Click **Save**.
You can also select multiple items to export. Read more

Select multiple items for export by holding down either the SHIFT key for a range of items or CTRL key for non-consecutive items, as you click with your mouse.

When you export multiple items, all the items will be exported to the same file type. You will need to select the file type, and then choose the folder to store the exported files.

<table>
<thead>
<tr>
<th>Right-click:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. In List View, right-click the required picture source.</td>
</tr>
<tr>
<td>2. Click the Export option.</td>
</tr>
<tr>
<td>3. Click the Export Picture/Log option.</td>
</tr>
</tbody>
</table>
Nodes

About Nodes

A node is a collection of references about a specific theme, place, person or other area of interest. You gather the references by reading through sources, such as interviews or focus groups, and categorizing information into the relevant nodes—this is called ‘coding’.

You can create nodes before coding or you can create them as you code. For example, to gather information about images of volunteers you could create the following nodes:

<table>
<thead>
<tr>
<th>Tree Nodes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>images of volunteers</td>
</tr>
<tr>
<td>adventurous</td>
</tr>
<tr>
<td>commitment to doing good</td>
</tr>
<tr>
<td>community minded</td>
</tr>
<tr>
<td>elderly, retired</td>
</tr>
<tr>
<td>energetic</td>
</tr>
<tr>
<td>free of commitments</td>
</tr>
<tr>
<td>have spare time</td>
</tr>
<tr>
<td>helping the poor</td>
</tr>
<tr>
<td>lonely</td>
</tr>
</tbody>
</table>

In List View, you can organize your nodes—adding, copying, deleting, sorting or moving as required.

Double-click a node to open it in Detail View. You can explore all the material coded at the node and add links, code at other nodes and easily jump back to the source.
Types of Nodes

**NVivo** provides the following node types:

- **Free Nodes**
  
  A free node is a 'stand-alone' node that has no clear logical connection with other nodes—it does not easily fit into a hierarchical structure:

<table>
<thead>
<tr>
<th>Name</th>
<th>Sources</th>
<th>References</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aspirations about volunteering tasks</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Court enforced community service</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Martyr</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Motivation</td>
<td>18</td>
<td>41</td>
</tr>
</tbody>
</table>

  Free nodes may be useful when you begin coding and have not yet developed a node structure.

  You can convert a free node into a tree node by moving it into a tree node folder.

- **Tree Nodes**
  
  Tree nodes are organized in a hierarchical structure—moving from a general category at the top (the parent node) to more specific categories (child nodes). You can use them to organize nodes for easy access, like a library catalogue.
**Cases**

Cases are nodes with attributes such as gender or age. They can represent a person, institute, site or other entity involved in your research.

Like tree nodes, case nodes can also be organized in hierarchies:

Refer to About Cases and Attributes for more information.

**Relationships**

Relationships are nodes that define the connection between two project items. For example, the relationship between two cases (Anna works with Bill) or between two nodes (government support impacts sustainability).

When working with sources, you can code evidence of a relationship at its associated node.

Refer to About Relationships for more information.

**Matrices**

Matrices are the result of a Matrix Coding Query. Matrix cells are nodes that you can explore and code.

Refer to About Matrices for more information.
Opening Nodes

After coding, you can open a node in Detail View and see all the information that has been gathered there:

This is the node community minded:

Since nodes are made up of references to sources, you cannot directly edit the content. You can click on the blue hyperlink to go back and edit source content or you can remove selected content from a node by 'uncoding' it. You can also annotate or add 'See Also' links to node content.

Accessing the Audio, Video or Picture Content Coded at a Node

Nodes can contain references from:

- Text-based sources—documents, externals and memos
- Audio/Video sources
- Picture sources

When you open a node you can see the text-based content in the Reference or Text tabs. To see and play the audio, video or pictures coded at the node, click the tabs on right of Detail View.

Exporting Nodes

You can export free nodes, tree nodes, cases and relationships to HTML and view them as a 'website' in your Internet browser. This can be useful if you want to share nodes with someone who does not have NVivo.
You can choose to include any supporting media files, annotations and other related content. You can also choose to export just the text-based node references or a node summary listing all the sources coded at the node.

To export a free node, tree node, case or relationship:

1. In the **List View**, select the required node.
2. On the **Project** menu, click **Export <Node>**.
   
   The **Export Options** dialog box is displayed.
3. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Export</strong></td>
<td>You can choose to export:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Entire content</strong>: Exports source content coded at the node as HTML files. If you select this option you can also choose to include annotations and other links.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Reference view</strong>: this exports the text-based node references (as displayed in the <strong>Reference</strong> tab) as a document (.txt, .doc, .docx, .rtf, or .pdf)</td>
</tr>
<tr>
<td></td>
<td>- <strong>Summary view</strong>: Exports a list of all the sources coded at this node including folder hierarchy and coverage (as displayed in the <strong>Summary</strong> tab). This can be exported as a spreadsheet (.xls) or as a document (.txt, .doc, .docx, .rtf or .pdf).</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>Include the project item name.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
<tr>
<td><strong>Format</strong></td>
<td>If you choose to include the name, you can select the required format.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Include the description as defined in the node properties.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
<tr>
<td><strong>Annotations</strong></td>
<td>Annotated text is highlighted and numbered. The text of the annotation is displayed under the heading <strong>Annotations</strong>.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
<tr>
<td><strong>See Also Links</strong></td>
<td>'See also' links are identified by superscript roman numerals (i) and the destination of the link is displayed under the heading <strong>See Also Links</strong>.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
</tbody>
</table>
Relationships

The items to which the node is related are displayed under the heading **Relationships**.

This option is only available when you choose to export the entire content or the reference view.

---

Memo Links

If the node is linked to a memo, the memo is listed under the heading **Linked Memo**.

This option is only available when you choose to export the entire content or the reference view.

---

Paragraph Numbers

This will display the paragraph number beside each paragraph.

This option is only available when you choose to export the entire content or the reference view.

---

Case Attributes

The attributes related to the case will be displayed under the heading **Overview**.

This option is only available when exporting cases—when you choose to export the entire content or the reference view.

---

Open on Export

Select this option, if you want the exported file to open automatically when the export has completed.

---

4. Click **OK**.

The **Save As** dialog box is displayed.

5. In the **Save in** list, select the destination for the exported file.

6. In the **File name** field, enter a name for the exported file.

7. In the **Save as type** field, select the format for the exported file.

8. Click **Save**.

You can also select multiple items to export. Read more

Select multiple items for export by holding down either the SHIFT key for a range of items or CTRL key for non-consecutive items, as you click with your mouse.

When you export multiple items, all the items will be exported to the same file type. You will need to select the file type, and then choose the folder to store the exported files.
For nodes that code audio and video sources, you can also include any supporting media files in the export.

The coded sections of media files will be included upon export only if you coded directly on the audio or video timeline. Refer to Coding Audio and Video Sources for details.

If you use Microsoft Internet Explorer to view exported HTML files containing audio or video, you may be asked to allow ActiveX controls. Refer to Microsoft Internet Explorer help for details.

To export matrices and the casebook, refer to the following topics:

- Exporting Matrices
- Exporting the Casebook

Viewing the Node in your Internet Browser

If you export an entire node to HTML, a number of files are exported. For example, if you export the node Motivation the following files are created in the destination folder.

- Motivation.hzn: This file is the 'homepage' - open it to see all the node references.
- Motivation_files: This folder contains any supporting files including audio, video and pictures.

Organizing Nodes in List View

Adding Nodes

NVivo provides a number of ways to create nodes:

Creating Nodes in List View

1. In Navigation View, click the Nodes button.
2. Click the folder for the type of node you want to create. For example to add a tree node, click the Tree Node folder.
3. On the Main toolbar, click the New button:

4. Click the <Type Node> in This Folder option. The <Type Node> depends on the folder you selected in Navigation View.

   The New <Type Node> dialog box is displayed.
5. Enter a name in the Name field.
6. If required, enter a description of the node in the Description field.
7. If required, enter an alternate name for the node in the Nickname field. You can use this name as a quick way to code content at the node. Nicknames must be unique within the node system.
8. Click OK.
Relationships have different properties from other nodes, refer to Adding Relationships for more information.

Unlike other nodes, you can assign attribute values to cases—refer to Assigning Attributes to Cases for details.

→ A Quick Way To Do This

Right-click:
1. Right-click in List View.
2. Click the New <Type Node> option.

When adding nodes in the New <Type Node> dialog box, you can use the Ctrl+Shift+A keyboard shortcuts to add multiple nodes quickly.

Creating Nodes While Coding

You can also create new nodes 'on-the-fly' as you work through your source material. Refer to Coding at New Nodes for more information about how to do this.

Let NVivo Create Nodes for You

**NVivo** can create nodes from:

- **Paragraph Styles**
  
  You can use paragraph styles to quickly code your source material. **NVivo** will automatically create cases or tree nodes based on specified paragraph styles and code the text under the style at the node. Refer to Auto Code by Paragraph Style for more information.

- **Paragraphs**
  
  For very structured documents, you can automatically create a node for each paragraph—the node names are based on paragraph numbers.
  
  In **NVivo**, a paragraph includes the text or images between two carriage returns.

- **Query Results**
  
  Creating nodes from query results provides a fast way to code your data.
  
  For example, you can search for text in a document and code each occurrence at a specific node—for example, code each occurrence of the text 'spare time' at the node *spare time*.
  
  You define the node name and type when you set up the query.
  
  Refer to Handling Query Results for more information.
Editing Node Properties

To edit the properties of a node:
1. In Navigation View, click the Nodes button.
2. Click the folder for the required node.
3. In List View select the required node.
4. On the Project menu, click <Node Type> Properties. This option changes depending on the type of node you are working with.
5. Edit the name, description or nickname as required.
   For cases, click the Attribute Values tab to edit the attribute values assigned to a case.
   For relationships, click a Select button to edit the From and To project items and change the relationship type.
6. Click OK.

Right Click:
1. Right-click the required node in List View.
2. Click the <Node Type> Properties option.

Adding Nodes to Sets

To add a node to a set:
1. In List View, click the required node. Click and drag to select multiple consecutive nodes or hold down the CTRL key for multiple non-consecutive nodes.
   If you select a parent node (for tree nodes or cases), its children are not automatically included in the set.
2. On the Project menu, click Add To Set. If there are no existing sets, you will be prompted to add a new one.
   The Select Set dialog box is displayed.
3. Click the required set.
4. Click OK.
   To see the set, click the Sets button in Navigation View.

Drag and drop from Detail View:
When you have a list of items displayed in Detail View (query results or node summaries) you can drag and drop items into a set:
1. Select the required items from Detail View.
2. Drag the items to the required set in Navigation View.
Copying Nodes

You can copy a node within its own node folder or across node folders—copying across folders changes the node type. For example, if you copy a free node into the case folder you are prompted to convert the free node into a case.

To copy a node:
1. In **List View**, click the required node.
2. On the **Edit** menu, click **Copy**.
3. In **Navigation View**, click the destination node folder. If you want to copy the node as a child of an existing tree node, select the required tree node in **List View**.
4. On the **Edit** menu, click **Paste**.
5. If converting a node, click **Yes** to confirm.

If a node of the same name already exists within the folder, a number is appended to the name.

![A Quick Way To Do This]

**Copy and Paste buttons:**
1. In **List View**, click the required node.
2. Click the **Copy** toolbar button:
3. Select the destination folder.
4. Click the **Paste** button.

**Right-click:**
1. In the **List View**, right-click the required node.
2. Click the **Copy** option.
3. Right-click the destination folder.
4. Click the **Paste** option.

Copying Relationships

Since relationships must be unique, you cannot copy them within the relationship folder. When you copy a relationship into another node folder, it is converted to the relevant node type and loses the properties of a relationship (it no longer links two project items and it has no direction).

You cannot copy another node type into a relationship folder.

Importing Nodes from Another Project

You can copy the node structure from another project by importing it into your project. Refer to **Importing Projects** for more information.
Deleting Nodes

When you delete a node, its coding is removed from all relevant sources.

To delete a node:
1. In Navigation View, click the Nodes button.
2. Click the folder that contains the node you want to delete.
3. In List View, select the node you want to delete. Click and drag to select multiple consecutive nodes or hold down the CTRL key to select multiple non-consecutive nodes.
4. On the Edit menu, click Delete.
5. Click Yes to confirm.

If you delete a tree node or a case, its children are also deleted.

Moving Nodes

You can move nodes using:
- Cut and Paste menu option
- Move Up and Move Down arrow buttons on the View toolbar (only for child tree nodes and case nodes)
- Drag and drop

You can move nodes:

Between folders

You can move cases, tree or free nodes between node folders—this changes the node type. For example, if you move a free node into the case folder you are prompted to convert the free node into a case.

To move a node between folders:
1. In List View, click the required node.
2. On the Edit menu, click Cut.
3. In the **Navigation View**, click the destination node folder. If you want to copy the node as a child of an existing tree node, select the required tree node in **List View**.

4. On the **Edit** menu, click **Paste**.

5. Click **Yes** to confirm.

**You cannot move cases, tree or free nodes into the Matrices or Relationships folder.**

### Within trees

You can move cases or tree nodes within a node hierarchy

To move a node within a tree:

1. In **List View**, click the required node.
2. On the **Edit** menu, click **Cut**.
3. Click the required parent node. To move the node to the top level of the tree, click the node folder in **Navigation View**.
4. On the **Edit** menu, click **Paste**.
5. Click **Yes** to confirm.

#### A Quick Way To Do This

**View toolbar:**

1. Click in the **List View** for tree nodes or cases.
2. Click the **Sort By Custom** button:

   ![View toolbar]

3. The **Move Up** and **Move Down** arrow keys are enabled.
4. In **List View**, click the required tree node.
5. Click the **Move Up** or **Move Down** arrow button to change the node's position.

**Drag and drop:**

1. Click the required node.
2. Drag to the required parent node or root level folder.

**Right-click:**

1. Right-click the required node.
2. Click the **Cut** option.
3. Right-click the parent node or root level folder.
4. Click the **Paste** option.
Moving Nodes Up or Down

To move tree nodes or cases up and down within the same level of a node hierarchy:
1. Click in List View.
2. In the View toolbar, click the Sort By Custom button:

The Move Up and Move Down buttons become active.
3. Use these buttons to move selected nodes to the required position.
   If you subsequently use another sort option, you can always return to your custom sort order by clicking the Sort By Custom button.

Sorting Nodes

In List View, you can organize or 'sort' the display of nodes to suit the way you want to work.
To sort nodes:
1. On the View menu, click Sort By.
2. Click a sort option.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Icon</td>
<td>Sort the nodes according to their icon type. This is useful when working with lists of multiple item types such as sets or query results.</td>
</tr>
<tr>
<td>Name</td>
<td>Sort nodes alphabetically by name.</td>
</tr>
<tr>
<td>Custom</td>
<td>Sort nodes manually using the MoveUp and MoveDown arrow keys on the toolbar. This option is only available when you are working with tree nodes or cases.</td>
</tr>
<tr>
<td>Memo Link</td>
<td>Sort by nodes that are linked to memos.</td>
</tr>
<tr>
<td>Sources</td>
<td>Sort by number of sources coded at the node.</td>
</tr>
<tr>
<td>References</td>
<td>Sort by the number of references (occurrences of coding) in the source.</td>
</tr>
<tr>
<td>Created</td>
<td>Sort nodes by their creation date.</td>
</tr>
<tr>
<td>Modified</td>
<td>Sort nodes by the date they were last modified.</td>
</tr>
</tbody>
</table>
Applying a Custom Sort Order

You can apply your own ordering to tree nodes or cases:

1. Click in **List View**.
2. Click the **Sort By Custom** toolbar button:

   ![Toolbar Image]

   The **Move Up** and **Move Down** buttons become active.
3. Use these buttons to move selected nodes to the required position.

   If you subsequently use another sort option, you can always return to your custom sort order by clicking the **Sort by Custom** button.

Showing Child Node Headers

For easy sorting, you can choose to show the child node column headers for tree nodes or cases. When coding or creating node hierarchies, this gives you options for display.

**With headers:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>status or volunteer work</td>
<td>0</td>
</tr>
<tr>
<td>different status volunteer</td>
<td>1</td>
</tr>
<tr>
<td>problems of unprofessional</td>
<td>2</td>
</tr>
<tr>
<td>professionalisation</td>
<td>2</td>
</tr>
<tr>
<td>taken for granted</td>
<td>5</td>
</tr>
<tr>
<td>propping up the system</td>
<td>1</td>
</tr>
<tr>
<td>government support</td>
<td>1</td>
</tr>
<tr>
<td>expense of organisations</td>
<td>1</td>
</tr>
<tr>
<td>sustainability</td>
<td>2</td>
</tr>
<tr>
<td>travel</td>
<td>2</td>
</tr>
</tbody>
</table>
Without headers:

<table>
<thead>
<tr>
<th>Issues</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>status of volunteer work</td>
<td>0</td>
</tr>
<tr>
<td>different status volunteer</td>
<td>1</td>
</tr>
<tr>
<td>problems of unprofessionalisation</td>
<td>2</td>
</tr>
<tr>
<td>taken for granted</td>
<td>5</td>
</tr>
<tr>
<td>propping up the system</td>
<td>1</td>
</tr>
<tr>
<td>government support</td>
<td>1</td>
</tr>
<tr>
<td>expense of organisations</td>
<td>1</td>
</tr>
<tr>
<td>sustainability</td>
<td>2</td>
</tr>
<tr>
<td>travel</td>
<td>2</td>
</tr>
</tbody>
</table>

To show column headers:

1. In **Navigation View**, click the **Nodes** button.
2. Click the **Tree Nodes** or **Cases** folder.
3. Expand the tree to display child nodes.
4. On the **View** menu, click **Child Node Headers**.
   This setting is saved when you close the project.

Merging Nodes

You can merge one or more nodes into another node. This can be a useful when two nodes have a similar meaning or content.

In this example, the node **Senior Citizen** is being merged into the node **Elderly**...

The 'target' node **Elderly** retains its name and description and is updated to include the content coded at **Senior Citizen**.

Any 'see also' links or annotations in **Senior Citizen** are now available in **Elderly**.

Sources that were coded at **Senior Citizen** are now coded at **Elderly**.

To merge one or more nodes into a 'target' node:

1. In **List View**, select the required node. Click and drag to select multiple consecutive nodes or hold down the CTRL key to select multiple non-consecutive nodes.
2. On the **Edit** menu, click **Copy** or **Cut** (deletes the original node.).
3. Click the target node.

4. On the Edit menu, click the Merge Into option.

5. To merge the node into an existing node, click the Merge Into Selected Node option.

   OR

   To merge the node into a new node under a parent node, click the Merge Into New Child Node option. This applies only when the target is a tree node or a case.

   The Merge Into Node dialog box is displayed.

6. Select the required options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merge child nodes</td>
<td>If you are merging a parent node you can choose to merge its children into the target node. This applies to tree nodes and cases.</td>
</tr>
<tr>
<td>Append linked memos</td>
<td>If the nodes being merged have linked memos, you can choose to append the content of the memos to the target's memo.</td>
</tr>
<tr>
<td>Copy see also links</td>
<td>If other project items have ‘see also’ links to the nodes being merged, you can choose to update those links to the name of the target node.</td>
</tr>
<tr>
<td>Copy relationships</td>
<td>If the nodes being merged are part of a relationship, you can update the relationship to point to the target node.</td>
</tr>
</tbody>
</table>

7. Click OK.

8. If you are creating a new child node, you will be prompted to name the node.

   You can also merge nodes when you import one project into another, refer to Importing Projects for more information.

   ➔ A Quick Way To Do This

   Right-click:
   1. Right-click the required node in List View.
   2. Click Copy or Cut.
   3. Right-click the target node.
   4. Click Merge into Selected Node.

Viewing all Nodes

To view all nodes in List View:

1. In Navigation View, click the Nodes button.

2. Under Search Folders, click on All Nodes. Nodes from all folders are displayed in List View.
Exploring Node Content in Detail View

Opening and Viewing Nodes

To explore all the references gathered at a node:

1. In Navigation View, click the **Nodes** button.
2. Click the required node folder. For example, to open a tree node, click the **Tree Nodes** folder.
3. In **List View**, double-click the required node.

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

   - The blue links are the sources coded at the node. You can click on the link to open the source.
   - Number of times the source was coded at the node. This source has 1 reference coded.
   - Blue highlight indicates an annotation - displayed in the tab below.

   Coverage refers to the percentage of the source that is coded at the node. 2.82% of this source is coded at the node.

   Move between the tabs to see the text, pictures, audio or video content coded at the node.

To close the node, click the **X** in the top right of **Detail View**.

Refer to the Adjusting the Node Display for more information about exploring node content.

Viewing different types of content

When exploring a node in **Detail View**, the following tabs are displayed:

- **Summary** - lists all the sources coded at the node
- **Reference** - displays all the references in the node
- **Text** - displays all the text in documents, memos and externals that is coded at the node
- **Picture** - displays all the picture content coded at the node
- **Audio** - provides access to all the audio content coded at the node
- **Video** - provides access to all the video content coded at the node
In the Text, Picture, Audio and Video tabs, thumbnails for each source are displayed at the top of the Detail View:

Opening Multiple Nodes

If required, you can open multiple nodes (or other items) and use the tabs at the top of Detail View to move between them. You can undock Detail View (Window>Undock All) to see multiple items on your desktop—this can be useful for side-by-side comparisons.

Hiding Coding Information

When a node is opened in Detail View, you can simplify the display by hiding the coding information (source name, references and coverage).

To hide coding information:
1. Open the required node in Detail View.
2. On the View menu, click Coding Summaries.
3. Click the item you want to hide:
   - Sources—displays a link to the source and the total number of references within the source
   - References—is displayed with Sources and shows the number of times the content has been coded
   - Coverage—is displayed with Sources and shows the total percentage of content coded for each source and the specific percentage for each content within the source

If you prefer to explore nodes in a separate window, click the Window menu and click the Docked option.
Viewing the Coding Context

While exploring a node, you can look at the context surrounding coded content—such as, a paragraph that surrounds some coded text—for example.

Four days a week are spent raising my one-year old. Weekends are usually dedicated to doing family activities that are mainly centered on our daughter. So we go swimming, visit the zoo, have picnics, etc. and time permitting, my husband and I squeeze in home renovation projects. I work 3 days per week—I mean real work.

The coding context (surrounding paragraph) is displayed in grey.

To view the coding context:
1. In the node Detail View, select the tab containing the coded content. For example, click the Picture tab to see coded picture content.
2. Select the required content.
3. On the View menu, click Coding Context.
4. Select the required option:

<table>
<thead>
<tr>
<th>Option</th>
<th>By default displays...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Narrow</td>
<td><strong>Text</strong>: Adds 5 words either side of the original text coded.</td>
</tr>
<tr>
<td></td>
<td><strong>Media</strong>: Adds 00:05 seconds to the duration on either side of the original time line coded.</td>
</tr>
<tr>
<td></td>
<td><strong>Transcript</strong>: Adds 5 words to either side of the content coded.</td>
</tr>
<tr>
<td></td>
<td><strong>Image</strong>: Extends image coded to 5% on all sides</td>
</tr>
<tr>
<td></td>
<td><strong>Log</strong>: Adds 5 words to either side of the original log entry coded.</td>
</tr>
<tr>
<td></td>
<td>Refer to Setting Application Options for information about changing defaults.</td>
</tr>
<tr>
<td>Broad</td>
<td><strong>Text</strong>: Adds the <em>surrounding paragraph</em> in gray text.</td>
</tr>
<tr>
<td></td>
<td><strong>Media</strong>: Adds 00:20 seconds to the duration on either side of the original timespan coded.</td>
</tr>
<tr>
<td></td>
<td><strong>Transcript</strong>: Adds the <em>surrounding cell</em> either side of the content coded. This displays the content of whole cell.</td>
</tr>
<tr>
<td></td>
<td><strong>Image</strong>: Extends image coded to 20% on all sides.</td>
</tr>
<tr>
<td></td>
<td><strong>Log</strong>: Adds the <em>surrounding cell</em> either side of the original log entry coded. This displays the content of whole cell.</td>
</tr>
<tr>
<td></td>
<td>Refer to Setting Application Options for information about changing defaults.</td>
</tr>
</tbody>
</table>
Custom Text: Gives the option to include the *surrounding text styles* in addition to being able to indicate the number of words (maximum 99 characters) and surrounding paragraph.

Media: Gives the option to include up to 01:00 duration on either side of the original time line coded.

Transcript: Gives options to include:
- up to 99 words on either side of the original transcript code
- surrounding paragraph
- surrounding cell
- rows overlapping timespan
- number of rows

Image: Gives the option to extend picture coding up to 99% on all sides.

Log: Gives the option to include up to 99 words on either side of the content coded, the surrounding paragraph, or surrounding cell.

| Entire Source | All content. |

To hide the context:
1. On the View menu, click Coding Context.
2. Click the None option.
3. 

A Quick Way To Do This

Coding Context toolbar button:
1. Select the required node content.
2. On the Coding toolbar, click the Coding Context button:

Right-click:
1. Select the required node content.
2. Right-click and click Coding Context.

Spread Coding to the Context

When exploring a node, you can spread the coding of selected content to include surrounding words, paragraphs, heading levels or the entire source.

To spread the coding for selected content:
1. In the node Detail View, click in the required content.
2. On the Code menu, click the Spread Coding to option.
3. Click the required spread level:
### Option  By default displays...

#### Narrow Context

**Text:** Adds 5 words either side of the original text coded.

**Media:** Adds 00:05 seconds to the duration on either side of the original time line coded.

**Transcript:** Adds 5 words to either side of the content coded.

**Image:** Extends image coded to 5% on all sides

**Log:** Adds 5 words to either side of the original log entry coded.

Refer to [Setting Application Options](#) for information about changing defaults.

#### Broad Context

**Text:** Adds the *surrounding paragraph* of the original text coded.

**Media:** Adds 00:20 seconds to the duration on either side of the original time line coded.

**Transcript:** Adds the *surrounding cell* either side of the content coded. This displays the content of the whole cell.

**Image:** Extends image coded to 20% on all sides.

**Log:** Adds the *surrounding cell* either side of the original log entry coded. This displays the content of the whole cell.

Refer to [Setting Application Options](#) for information about changing defaults.

#### Custom

**Text:** Gives the option to include the *surrounding text styles* (i.e. if the coded text is in *normal* font style, this option will spread the coding to the surrounding text also in *normal* font style and will not include text in *heading* styles). Also enables you to spread the coding by indicating the *number of words* (maximum 99 characters) or by including *surrounding paragraph*.

**Media:** Gives the option to include up to 01:00 duration on either side of the original timespan coded.

**Transcript:** Gives options to include:

- up to 99 words on either side of the original transcript code
- *surrounding paragraph*
- *surrounding cell*
- *rows overlapping timespan*
- *number of rows*

**Image:** Gives the option to extend picture coding up to 99% on all sides.

**Log:** Gives the option to include up to 99 words on either side of the content coded, the *surrounding paragraph*, or *surrounding cell*.

#### Entire Source

**All content.**

---

**A Quick Way To Do This**

**Right-click:**

1. Right-click the required content.
2. Click the *Spread Coding to* option.
Viewing Coding Excerpts

When exploring a node in **Detail View**, you can set options for displaying coding excerpts. For example, you may want to see just the first paragraph of all excerpts:

```
<Documents\Interviews\Anna> - 52 references coded [6.20% Coverage]  

Reference 1 - 2.18% Coverage

Some people may enjoy volunteering to fill in spare time and give them a sense of self worth. For example retirees often spend some of their time volunteering to keep busy.
```

To set display options for coding excerpts:
1. Open the required node in **Detail View**.
2. On the **View** menu, click **Coding Excerpt**.
3. Click the required option.
   - **None**—hide all coding excerpts and display only the reference information.
   - **Start**—display the first sentence of all excerpts.
   - **All**—display complete excerpts (this is the default setting).

Uncoding Intersecting Content

When exploring a node in **Detail View**, you can create new nodes for emerging themes and categories. To refine the nodes, you can uncode intersecting content.

For example, early in a project you might code content at the node **Community Groups**. When exploring the node, you 'code on' to the finer categories of **Sport Clubs** and **Church Groups**. To refine **Community Groups**, you could select it as the 'target' node and uncode all content that intersects with **Sport Clubs** and **Church Groups**.

To remove all coding intersecting selected nodes:
1. In **List View**, select the required 'target' node. Click and drag to select multiple consecutive nodes or hold down the CTRL key to select non-consecutive nodes.
2. On the **Code** menu, click **Uncode Intersecting Content**.
   - The **Select Project Items** dialog box is displayed.
3. On the left, select the folder (**Free Nodes**, **Tree Nodes**, **Cases** or **Relationships**) containing the nodes you want to uncode. If you want to uncode at all nodes within a folder, click the folder check box—all nodes coding the content are automatically selected.
4. On the right, select the nodes you want to uncode. To select all nodes under a parent node, click the **Automatically select hierarchy** check box.
   - You can use the **Filter** button to limit the display to nodes that match specific criteria—refer to **Finding Project Items by Name** for more information. Click the **Select All** button to automatically select items matching the criteria.
   - If the node has a nickname, you can enter it in the **Select item from nickname** drop-down list and click the **Select** button.
5. To uncode by users, click the required option in the **Uncode at** field:
   - **All Users**—removes coding done by all users identified
Current User—removes coding done by the current user

Selected Users—removes coding done by selected users. Clicking on the Select button will display the Select Project Item dialog box to enable you to choose the required users.

6. Click OK.

Intersecting content is removed from the target node.

Zooming in on Nodes

You can "zoom in" to get a close-up view of a node or "zoom out" to see more of a node at a reduced size.

To set the zoom level:
1. Open the node in Detail View.
2. On the View menu, click the Zoom option.
   The Zoom dialog box is displayed.
3. Select the required magnification.
4. Click OK.

Filtering Nodes by User

When exploring a node in Detail View, you can filter the node to see only coding done by selected users.

To filter a node by user:
1. Open the required node in Detail View.
2. On the View menu, click the Coding by Users option.
3. Click the required option:
   • All Users: display content coded at the node by all users.
   • Current User: display content coded at the node by the current user. The current user's initials are displayed in the status bar.
   • Selected Users: display content coded by selected users. In the Select Project Items dialog box, select the required users.

Refer to Working in Teams for more information about user profiles.
Cases and Attributes

About Cases and Attributes

A case is a node with ‘attributes’—gender, age, size, location and so on.
It can represent a person or entity involved in your research. For example, you might create a case to gather information about a participant, site or institution in a study.

As you work through your sources, you can code selected content at the relevant case.

Attributes enable you to compare cases using demographic variables. For example, you could compare male and female responses to the question Why Volunteer?

Like tree nodes, you can organize cases in hierarchies. For example, you could have all male participants under the parent case Males.

Setting Up Attributes

An attribute is made up of two parts:

- A name such as gender
- Values such as female, male.

Since attributes provide a way of classifying cases, you create them in the Attributes folder under Classifications. Refer to Adding Attributes and Values for more information.

Importing Cases and Attributes

NVivo can automatically create cases, attributes and values from a tab-separated text file—create a table in another application such as Excel or Word, save it as a .txt file and import it into NVivo.

Refer to Importing Cases and Attributes for information about formatting and importing the text file.

The matrix of cases and attributes is called the Casebook.
Adding Attributes and Values

You can also create attribute values in the project casebook. Refer to Adding Attribute Values in the Casebook.

1. In Navigation View, click the Classifications button.
2. Click the Attributes folder.
3. Click the New button on the Main toolbar:

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.
6. If required, enter a description of the attribute in the Description field.
7. Select the attribute type from the Type drop-down list.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>String</td>
<td>An attribute with text values such as Gender: male/female or a number range 18-24</td>
</tr>
<tr>
<td>Number</td>
<td>An attribute with numerical values such as Age: 18</td>
</tr>
<tr>
<td>Date</td>
<td>An attribute with a date value such as Birth Date: 10/09/65</td>
</tr>
</tbody>
</table>

8. Click the Values tab to define the values for the attribute.
9. In the Values tab, click the Add button.
10. Enter the value name in the Value cell. For example, male or 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 the Add button to define further values. While working in the Values tab you can also:

Remove Attribute Values

1. Click in the left column of the required value. An arrow is displayed and the value is selected.
2. Click the Remove button.

   You cannot remove the system defined values 'Unassigned' and 'Not Applicable' but you can change these labels in Project Properties.

   If you remove a value, you will be prompted to select a replacement value. Any cases that were assigned the deleted attribute value will now be assigned the replacement value.
Order Attribute Values

The order of values is significant if you want to find or query cases where a specific attribute is greater or less than a selected value. For example, you may want to find all organizations (cases) whose size is greater than small.

To do this, you would need to order the size attribute values as:

- Small
- Medium
- Large

If this list is sorted alphabetically, your find results would yield unexpected results—small would be considered greater than large.

To change the order of values:

1. Click in the left column of the required value. An arrow is displayed and the value is selected.
2. Click the Move Up or Move Down button to move the value up or down the list.
3. Click the Sort button to arrange the display in ascending order: A to Z, zero to 9 or earliest to latest date. This is the default order for values but you can change it using the Move Up or Down buttons.

- If you import attributes from a text file, the string values are not sorted in a specific order.

14. Click OK.

A Quick Way To Do This

Right-click:
1. Right-click in List View.
2. Click the New Attribute option.

Editing Attribute Properties

To edit the name, description or values defined for an attribute:

1. In Navigation View, click the Classifications button.
2. Click the Attributes folder.
3. In List View, double-click the required attribute.
   The Attribute Properties dialog box is displayed.
4. Edit the name and description as required.
5. Click the Values tab to edit the values defined for the attribute. Refer to Adding Attributes and Values for more information about working with attribute values.
6. Click OK.
Deleting Attributes

When you delete an attribute, it and all its values are removed from the cases in your project.

To delete an attribute:
1. In Navigation View, click the Classifications button.
2. Click the Attributes folder.
3. In the List View, select the required attribute.
4. On the Edit menu, click Delete.
5. Click Yes to confirm.

Right-click:
1. In the List View, right-click the required attribute.
2. Click the Delete option.
3. Click Yes to confirm.

DELETE Key:
1. In List View, click the required attribute.
2. Press the DELETE key.
3. Click Yes to confirm.

Adding Cases

To create a case:
1. In Navigation View, click the Nodes button.
2. Click the Cases folder.
3. Click the New button on the Main toolbar:
   ![Main toolbar with New button highlighted]
4. Click the Case in this Folder option.

OR

To add a new case under an existing case, click the parent case in List View—on the Project menu, click New Case.

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. Nicknames must be unique within the node system.
8. Click the **Attribute Values** tab to assign attribute values to the case. Refer to [Assigning Attributes to Cases](#) for more information.

9. Click **OK**.

### A Quick Way To Do This

**Right-click:**

1. Right-click in **List View**.
2. Click the **New Case** option.

### Assigning Attributes to Cases

To define the attributes of a case:

1. In **Navigation View**, click the **Nodes** button.
2. Click the **Cases** folder.
3. In **List View**, click the required case.
4. On the **Project** menu, click **Case Properties**.
   
   The **Case Properties** window is displayed.
5. Click the **Attribute Values** tab.
6. In each **Value** cell, select a value from the drop-down list. Cases must have a value for each attribute. If an attribute is not relevant to a case, you can assign it one of the default values *Unassigned* or *Not Applicable* (you can change these default labels in **Project Properties**).
7. Click **OK**.

The **Attribute Values** list is empty if your project does not contain attributes. Refer to [Adding Attributes and Values](#) for information about adding attributes to your project.

If you change the attribute values for a parent case, you will be prompted to apply the changes to the child cases.

### A Quick Way To Do This

**Right-click:**

1. In the **List View**, right-click the required case.
2. Click the **Case Properties** option.
3. Click the **Attribute Values** tab.

### Assign Values in the Casebook:

1. On the **Tools** menu, click **Casebook**.
2. Click **Open Casebook**.
3. Click in the cell for the required case and attribute.
4. Select the required value from the drop-down list.
Creating Cases from Sources

When you import sources, you can automatically create cases from them.

You also create cases from selected sources in List View:

1. In List View, select the required sources. Click and drag to select multiple consecutive items or hold down the CTRL key to select non-consecutive items.
2. On the Project menu, click Create As.
3. Click the Create Cases option.
   The Select Location dialog box is displayed.
4. To create the cases at the root level, click the Folders folder on the left and the Cases folder on the right.
   OR
   To create the cases under a parent case, click the Cases folder on the left and the parent case on the right.
5. Click OK.
   The cases are created based on the selected source names. To see the cases, click the Nodes button in Navigation View and click the Cases folder.

Right-click:

1. In List View, select the required sources.
2. Right-click and select the Create As option.
3. Click the Create Cases option.

Working with the Casebook

About the Casebook

The casebook is a table containing your cases and the attribute values that have been assigned to them.

You can build the casebook in NVivo by:

- Adding attributes and values (under Classifications in Navigation View)
- Adding cases (under Nodes in Navigation View)

Or, if you have information about your cases and attributes in a spreadsheet or a statistics package, you can save it as a tab-separated text (.txt) file and import it into NVivo.

You can also export the casebook for use in other applications.

Working with the Casebook

In the casebook you can:

- Add new attribute values
- Filter the casebook display. For example, you could display only those cases defined as female who are tertiary educated.
You can access your cases directly from the casebook. To open a case, right-click on the selected case or cell and select **Open Case** from the context menu.

### Adding to the Casebook

You can import new cases, attributes or attribute values into the casebook. When you import a text file, **NVivo** adds new items and updates existing items.

### Opening the Casebook

If you have added cases and attributes to your project, you can display them in the casebook.

To open the casebook for a project:

1. On the **Tools** menu, click **Casebook**.
2. Click the **Open Casebook** option.

The casebook is displayed in **Detail View**. In this view you can:

- **Add attribute values**
- **Adjust the casebook display**

If you have not defined cases or attributes, the casebook is displayed as an empty table.

You can open an individual case from the casebook—right-click on the required case and then select **Open Case** from the context menu.

### Importing Cases and Attributes

You can create a casebook by importing a tab-separated text file that contains your cases and their attributes. [View example](#)
Tab-separated text files containing attributes and values for import must be in the following format:

<table>
<thead>
<tr>
<th>Attribute 1</th>
<th>Attribute 2</th>
<th>Attribute 3</th>
<th>Attribute 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case</td>
<td>Value</td>
<td>Value</td>
<td>Value</td>
</tr>
<tr>
<td>Case</td>
<td>Value</td>
<td>Value</td>
<td>Value</td>
</tr>
<tr>
<td>Case</td>
<td>Value</td>
<td>Value</td>
<td>Value</td>
</tr>
</tbody>
</table>

To import a casebook:

1. On the **Tools** menu, click the **Casebook** option.
2. Click the **Import Casebook** option. The **Import Casebook** dialog box is displayed.
3. Select the required import options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import from</td>
<td>The location of the required (.txt) file. Click the <strong>Browse</strong> button to locate the text file you want to import.</td>
</tr>
<tr>
<td>File encoding</td>
<td><strong>NVivo</strong> allows you to import text files in different formats. These formats allow you to work with languages that use different character sets, such as Spanish or Chinese. By default, <strong>NVivo</strong> is set to import a text file encoded using 'Unicode'. Unicode handles most of the world's writing systems and is a computer industry standard for text files. If you create your casebook in Microsoft Word, Excel or Notepad, you can choose to save it as a Unicode text file. If you cannot save your casebook as a Unicode text file, then you should use this drop-down list to select the file encoding that matches the format of your text file.</td>
</tr>
<tr>
<td>Text qualifier</td>
<td>If the text file you want to import contains text qualifiers (',&quot;), you can specify these on import. Select a qualifier from the drop-down list.</td>
</tr>
<tr>
<td>Date Format</td>
<td>The format used for dates in the text file you want to import. Select a format from the drop-down list.</td>
</tr>
<tr>
<td>Unassigned attribute value format</td>
<td>The format that has been used to indicate an <em>unassigned</em> attribute value in the text file you want to import. For example, if you use dashes (-), dashes will be converted to &quot;Unassigned&quot; when you import the file. Select the relevant format from the drop-down list.</td>
</tr>
</tbody>
</table>
Not Applicable attribute value format

The format that has been used to indicate when an attribute value does not apply to a specific case.

For example, if you use a space, the space will be converted to "Not Applicable" when you import the file.

Select the relevant format from the drop-down list.

Case name format

The format that has been used to identify case names. You can

- Select the Name option, if you have used simple case names (without back slashes).
- Select the Nickname option, if you want to create the cases with the specified nickname. You can see the nickname in the case properties and in the coding toolbar. Refer to Quick Coding with Nicknames for more information.
- Select the Hierarchical option, if you have used hierarchical case names (indicated by back slashes). On import, the cases will be created in the specified hierarchy.

Replace existing attribute values

Check this box if you want the attribute values in the imported text file to overwrite existing values the casebook.

For example, if Sam's immigration date is defined as Unassigned in the casebook and the imported text file defines the immigration date as 01/01/1975 then the Unassigned value will be overwritten.

Create unmatched attributes

Check this box if you want new attributes (that do not currently exist in the casebook) to be added when you import the text file.

Create unmatched cases

Check this box of you want new cases (that do not currently exist in the casebook) to be added when you import the text file.

Case location

The location for new cases (that do not currently exist in the casebook).

Click the Select button to specify the location. For example, you may want to put new cases under an existing case.

4. Click **OK**.

The cases, attributes and values are imported in the casebook and are displayed in **Detail View**. In this view you can:

- **Add attribute values**
- **Adjust the casebook display**

If the format of your text file does not match the **File encoding** standard that you selected on the **Import Casebook** dialog box, you will get an error when you try to import the casebook. By default, NVivo is set up to import the casebook as a Unicode text file. If you are using Microsoft Word, Excel or Notepad, you can choose to save to a Unicode text file.
Adding Attribute Values in the Casebook

You can create a new value for an attribute by entering it directly into the casebook.

To add a value in the casebook:
1. On the Tools menu, click Casebook.
2. Click the Open Casebook option.
   The casebook is displayed in Detail View.
3. Click in the cell for the required attribute.
4. Click the drop-down arrow.
   The value cell becomes editable.
5. Enter the new value
6. Click out of the cell.
   The value is now available to be applied to other cases.

Adjusting the Casebook Display

When working with cases and attributes in the casebook you can:

Flip the Columns and Rows

To transpose the columns and rows in the casebook:
1. In Detail View, click in the casebook.
2. On the View menu, click Transpose.
   The rows and columns are rearranged.

Hide Rows and Columns

To hide a casebook column:
1. Click the column header to select the column.
2. On the View menu, click Column.
3. Click Hide.

To hide a row:
1. Click the row header to select the row.
2. On the View menu, click Row.
3. Click **Hide**.

If you show/hide columns and rows, any filters are overridden.

**Filter the Columns and Rows**

Filters provide a way of showing/hiding columns (or rows in a transposed casebook) based on attribute values.

To apply a filter:

1. Click the filter icon for the required attribute.
   
   The **Casebook Filter Options** dialog box is displayed.

2. Select the required filter options:

<table>
<thead>
<tr>
<th><strong>Option</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
</table>
| Show/Hide rows or columns | Show or hide rows/columns based on the selected criteria.  
   Select **Show** or **Hide** from the drop-down list.  
   If you transpose the table so that attributes are displayed as rows, this drop-down list applies to columns instead. |

| where value in column | This field displays the name of the selected column/row. You cannot change the contents of this field. |

| is                    | Show or hide rows/columns depending on how the row/column content compares to a selected value. For example, equal to or greater than.  
   When working with string (non-numerical) attributes, the greater/less than comparison is based on how the attribute values are ordered in the attribute properties.  
   Refer to **Adding Attributes and Values** for more information about ordering attributes. |

| value                 | Show or hide rows based on how the column content compares to this value.  
   Select the value from the drop-down list. For numerical values, you can enter the required number.  
   If you transpose the casebook so that attributes are displayed as rows, you can select the **value in column** radio button. |

3. Click **OK**.

Only columns/rows matching the filter are displayed.

To display the casebook in its original form, click the **View** menu and click the **Reset Settings** option.
Select columns, rows or the whole casebook

To select a column, click the column header.
To select a row, click the row header.
To select the whole casebook, click the first cell in the top-left corner.

Return to Original Settings

To return the casebook display to its original state:
1. In Detail View, click in the casebook.
2. On the View menu, click Reset Settings.

You cannot filter the casebook display in a read-only project.

A Quick Way To Do This

Use the Grid toolbar to adjust the casebook display:

Exporting the Casebook

You can export the casebook as a tab-separated text file and open it in Excel. This can be useful if you want to do multiple updates or share the casebook with someone who does not have NVivo.

To export the casebook:
1. On the Tools menu, click Casebook.
2. Click the Export Casebook option.
   The Export Casebook dialog box is displayed.
3. Click the Browse button to define the location for the exported file.
4. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File encoding</td>
<td>NVivo allows you to export the casebook in different text file formats. These formats allow you to work with languages that use different character sets, such as Spanish or Chinese. By default, NVivo is set to export the casebook as a text file encoded using 'Unicode'. Unicode handles most of the world's writing systems and is a computer industry standard for text files. Microsoft Word, Excel and Notepad support the Unicode format. If the file you are exporting is for use in another language or computer system you may need to choose a different encoding standard.</td>
</tr>
</tbody>
</table>
Text qualifier

If you want text in the exported file to be displayed with a selected text qualifier—select a qualifier from the drop-down list.

Date Format

The format for dates that are exported.
Select the relevant format from the drop-down list.

Unassigned attribute value format

The format in which you want to display unassigned attribute values.
For example, if you select dash (-), unassigned attribute values will be displayed as dashes in the exported text file.
Select the relevant format from the drop-down list.

Not Applicable attribute value format

The format in which you want to display attribute values that do not apply to a case.
For example, if you select space, not applicable attribute values will be displayed as spaces.
Select the relevant format from the drop-down list.

Case name format

The format for exported case names

- Select the Name option, if you want simple case names (without backslashes).
- Select the Hierarchical option, if you want hierarchical case names (indicated by backslashes).
- Select the Nickname option, if you want the case nickname displayed. Refer to Quick Coding with Nicknames for more information.

5. Click OK.

Right-click:

1. In Detail View, right-click on the opened casebook.
2. Click Export Casebook.

Relationships

About Relationships

A relationship is a node that defines the connection between two project items. For example, the relationship between two cases (Anna employs Ken) or between two nodes (Perceptions impact Motivations).

Relationship Types

You can define the type of relationships you require—knows, employs, loves, impacts and so on. When adding a relationship type you can define one of the following directions:

- One way (Anna employs Ken)  
- Associative (Anna knows Ken)  
- Symmetrical (Anna works with Ken)
NVivo provides a default relationship type, you can change the name of the default type in Project Properties.

Coding at Relationships
As you work through your sources you can code information at relationships. For example, you can code text that is evidence of Anna employing Ken at the Anna employs Ken relationship. You can then open the relationship node and explore the evidence you have gathered.

Modeling Relationships
You can add relationships to a model to visualize the connections between your project items:

Adding Relationship Types
To create a relationship type:
1. In Navigation View, click the Classifications button.
2. Click the Relationship Types folder.
3. Click the New button on the Main menu:
4. Click the Relationship Type in This Folder option.
   The New Relationship Type dialog box is displayed.
5. Enter a name in the Name field.
6. If required, enter a description of the relationship type in the Description field.
7. Select the relationship direction from the Direction drop-down list.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associative</td>
<td>The relationship implies no direction and indicates that items are related to each other in some way. For example, Anne works with Bill.</td>
</tr>
<tr>
<td>One Way</td>
<td>The relationship is in one direction. For example, Anne employs Bill.</td>
</tr>
<tr>
<td>Symmetrical</td>
<td>The relationship is bi-directional. For example, Anne is married to Bill.</td>
</tr>
</tbody>
</table>

8. Click OK.
Deleting Relationship Types

You cannot delete a relationship type that is being used to define a relationship.

To delete a relationship type:
1. In Navigation View, click the Classifications button.
2. Click the Relationships Type folder.
3. In the List View, click the required relationship type.
4. On the Edit menu, click Delete.
5. Click Yes to confirm.

Right-click:
1. Right-click in the List View.
2. Click the New Relationship Type option.

DELETE Key:
1. In the List View, click the required node.
2. Press the DELETE key.
3. Click Yes to confirm.
Editing Relationship Types

To edit the name, description or direction of a relationship type:
1. In Navigation View, click the Classifications button.
2. Click the Relationships Types folder.
3. In List View, click the required relationship type.
4. On the Project menu, click Relationship Type Properties.
   The Relationship Type Properties dialog box is displayed.
5. Edit the required details.
6. Click OK.

Right-click:
1. In List View, right-click on the required relationship type.
2. Click the Relationship Type Properties option.
3. Edit the required details.
4. Click OK.

Setting a Default Relationship Type

If required, you can set a default relationship type for relationships:
1. In Navigation View, click the Classifications button.
2. Click the Relationships Types folder.
3. In List View, click the relationship type that you want to set as the default.
4. On the Project menu, click Default Relationship Type.
   The selected relationship type is set as the default and is displayed with a check mark: ✓

Adding Relationships

To add a relationship:
1. In Navigation View, click on the Nodes button.
2. Click the Relationships folder.
3. On the **Main** toolbar, click the **New** button:

4. Click the **Relationship in This Folder** option. The **New Relationship** dialog box is displayed.

5. Click the **Select** buttons in the **From** and **To** fields to choose the items involved in the relationship. The **Select Project Item** dialog box is displayed.

6. On the left, click the required folder.

7. On the right, select the required project item. You can click the **Filter** button to display only items that match specified criteria.

8. Click **OK**.

9. In the **Type** panel, click the **Select** button to choose required relationship type. Refer to Adding Relationship Types for more information. The **Direction** and **Description** of the selected type is displayed—you cannot edit the contents of these fields. Refer to Editing Relationship Types for information about changing the name, description or direction of a relationship type.

10. Click **OK**.

---

**A Quick Way To Do This**

Right-click:

1. Right-click in the **List View**.
2. Click the **New Relationship** option.

---

**Editing Relationships**

To edit a relationship:

1. In **Navigation View**, click the **Nodes** button.
2. Click the **Relationships** folder.
3. In the **List View**, click the required relationship.
4. On the **Project** menu, click **Relationship Properties**. The **Relationship Properties** dialog box is displayed.

5. In the **From** and **To** fields, click the **Select** button to edit the items involved in the relationship.
6. In the **Type** panel, click the **Select** button to edit the relationship type.
7. Click **OK**.

The **Direction** and **Description** of the selected relationship type is displayed—you cannot change the content of these fields. Refer to Editing Relationship Types for more information.
Right-click:
1. In List View, right-click on the required relationship.
2. Click the Relationship Properties option.

Matrices

About Matrices

A matrix is a collection of nodes resulting from a Matrix Coding Query:

<table>
<thead>
<tr>
<th>Time by Gender</th>
<th>A: gender = male</th>
<th>B: gender = female</th>
</tr>
</thead>
<tbody>
<tr>
<td>1: 'spare' time</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>2: time as money</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>3: too little time</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>4: giving time</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>5: taking time</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

You can double-click a cell (node) to see all the content coded at the intersection—for example, double-click the cell for 'spare' time and male to see everything men said about 'spare' time.

Although the cells represent nodes that you can open and explore, you cannot code at matrix nodes.

Where Are Matrices Stored?

Like other query results, you can specify the location for a matrix during query setup or after previewing the results. You can choose to save it in the:

- **Results** folder under **Queries**
- **Matrices** folder under **Nodes**

Refer to Matrix Coding Query and Matrix Coding Query Results for more information about working with matrices.

Opening Matrices

To open an existing matrix:
1. In Navigation View, click the Nodes button.
2. Click the Matrices folder.
3. In List View, double-click the required matrix.
The matrix is displayed in **Detail View**. Refer to [Adjusting the Matrix Display](#) for information about working with a matrix. To create a new matrix, you need to run a **matrix coding query**.

### A Quick Way To Do This

<table>
<thead>
<tr>
<th><strong>Double-click:</strong></th>
<th><strong>Right-click:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. In <strong>List View</strong>, double-click a matrix to open it.</td>
<td>1. In <strong>List View</strong>, right-click the required item.</td>
</tr>
<tr>
<td></td>
<td>2. Click <strong>Open Matrix</strong>.</td>
</tr>
</tbody>
</table>

### Adjusting the Matrix Display

When working with the results of a matrix coding query you can:

**Flip the Columns and Rows**

To transpose the columns and rows:

1. In **Detail View**, click in the matrix.
2. On the **View** menu, click **Transpose**. The rows and columns are rearranged.

**Hide Rows and Columns**

To hide a matrix column:

1. Click the column header to select the column.
2. On the **View** menu, click **Column**.
3. Click **Hide**.

To hide a row:

1. Click the row header to select the row.
2. On the **View** menu, move the mouse pointer over **Row** to open the selection.
3. Click **Hide**.

If you show/hide columns and rows, any filters are overridden.

**Filter the Columns and Rows**

Filters provide a way of showing/hiding columns (or rows in a transposed matrix) based on attribute values.

To apply a filter:

1. Click the filter icon for the required attribute.
   
   The **Matrix Filter Options** dialog box is displayed.
2. Select the required filter options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show/Hide rows or columns</td>
<td>Show or hide rows/columns based on the selected criteria. Select <strong>Show</strong> or <strong>Hide</strong> from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>If you transpose the table, this drop-down list applies to columns instead.</td>
</tr>
<tr>
<td>where value in column</td>
<td>This field displays the name of the selected column/row. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>is</td>
<td>Show or hide rows/columns depending on how the row/column content compares to a selected value. For example, <em>equal to</em> or <em>greater than</em>.</td>
</tr>
<tr>
<td>value</td>
<td>Show or hide rows based on how the column content compares to this value. Select the value from the drop-down list. For numerical values, you can enter the required number.</td>
</tr>
<tr>
<td></td>
<td>If you transpose the matrix, you can select the <strong>value in column</strong> radio button.</td>
</tr>
</tbody>
</table>

3. Click **OK**.

Only columns/rows matching the filter are displayed.

To display the matrix in its original form, click the **View** menu and click the **Reset Settings** option.

To change the information that is displayed in the cells of a matrix:

1. Click in the **Detail View** containing the matrix.
2. On the **View** menu, click **Matrix Cell Content**.
3. Click the required display:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sources Coded</td>
<td>Number of sources coded at the row and column intersection.</td>
</tr>
<tr>
<td>Cases Coded</td>
<td>Number of cases coding the row and column intersection.</td>
</tr>
<tr>
<td>Words Coded</td>
<td>Number of words coded at the row and column intersection</td>
</tr>
</tbody>
</table>
Duration Coded
For audio or video sources, the amount of time coded at the row and column intersection.

Coding References
Number of coding occurrences for the row and column intersection. For example, material is coded at positive and male 12 times.

Row Percentage
The percentage of the row item that is coded at the intersection of the row and column.

Column Percentage
The percentage of the column item that is coded at the intersection of the row and column.

Coding Presence
Identifies whether coding is present for the row and column intersection. (Yes or No)

Apply Shading to Cells
You can choose a color shading scheme to shade cells proportionately to the numbers they contain—this is a useful way to see patterns in your data.

The two color 'blue-white' scheme provides five levels of shading, whereas the three-color schemes (e.g. Green-Yellow-Red) use a broader spectrum of colors.

To apply shading:
1. In Detail View, click in the matrix.
2. On the View menu, click Matrix Cell Shading and select a color shading scheme.

Select columns, rows or the whole matrix
To select a column, click the column header. To select a row, click the row header. To select the whole matrix, click the first cell in the top-left corner.

Return to Original Settings
To return the matrix display to its original state:
1. In Detail View, click in the matrix.
2. On the View menu, click Reset Settings.

Use the Grid toolbar to adjust the matrix display:
Exporting Matrices

You can export the results of a matrix coding query as a Microsoft Excel file (.xls) or a tab-separated text file (.txt). This can be useful if you want to share a matrix result with someone who does not have NVivo.

To export a matrix:
1. Open an existing Matrix.
   OR
   Create and run a matrix coding query—refer to Matrix Coding Queries for more information.
   The matrix is displayed in Detail View.
2. On the Project menu, click Export Matrix.
   The Save As dialog box is displayed.
3. In the Save in list, select the destination for the exported file.
4. In the File name field, enter a name for the exported file.
5. In the Save as type field, select the format type for the exported file.
6. Click Save.

You can also select multiple items to export. Read more

Select multiple items for export by holding down either the SHIFT key for a range of items or CTRL key for non-consecutive items, as you click with your mouse.

When you export multiple items, all the items will be exported to the same file type. You will need to select the file type, and then choose the folder to store the exported files.

Right-click:
1. In the List View or Detail View, right-click on the required matrix.
2. Click Export Matrix.
Coding

About Coding

Coding provides a way to manage your qualitative data—by creating nodes and coding at them, you can catalogue your ideas and gather material by topic.

Gather material from multiple sources into a node and explore the content in one place.

You can 'code on' from the references in a node—select the content and code it at the required nodes.

What Can You Code?

You can code the content of any source (whether imported or created in NVivo). The content available for coding includes:

- Text—select and code text in documents, memos and externals. You can code as much text as required: a single letter, a few words, a whole passage or the entire source. The exact text you select and code is displayed in a node. You can choose whether you want NVivo to automatically code the whole word or just selected characters—refer to the General tab in Setting Application Options.

- Tables in a document—click and drag to select and code text in a table.

- Images in a document—click on an entire image to select and code it at the required node.

- Pictures and log entries in a picture source—click and drag to select a region of a picture or text in the log and code it at the required node.

- Video and audio—click and drag on the timeline to select and code the required portion of media.

- Video and audio transcripts—click and drag text in the Content field and code it at the required node.

When you explore the source references gathered at a node, other themes or ideas may emerge. You can 'code on' by selecting and coding the content gathered in the node—this coding is reflected in the original source.

Ways of Coding

NVivo provides the following ways of coding your data:

- Select the content in a source and use the Coding toolbar or Code menu to code at one or more nodes.
Use **range coding** to quickly code 'chunks' of text or other content.

- Auto code by **paragraph style**, **paragraph** or **transcript fields**.
- Run a query and make a node from the results. For example, run a text search for the words *friends* and *fun* and automatically code them at a node called *social interaction*. In your sources, every occurrence of the search words will be automatically coded.

### Coding at Existing Nodes

When exploring a source or node, you can select content and code it at one or more existing nodes. The content you can code includes:

- Text in documents, memos and externals
- Images in documents
- Pictures, picture regions and picture logs in a picture source
- Audio and transcript content in audio sources
- Video and transcript content in video sources

To code at existing nodes, you can use **Menus**:

1. Open the source or node you want to code—it is displayed in **Detail View**.
2. Select the content you want to code.
3. On the **Code** menu, click **Code Selection**.
4. Click the **At Existing Nodes** option.
   - The **Select Project Items** dialog box is displayed.
5. If you want to automatically select child nodes (for tree nodes and cases), click the **Automatically select hierarchy** option.
6. On the left, click the name of the required node folder—for example, Tree Nodes, Free Nodes, or Cases.
7. On the right, click the check boxes for the required nodes.
   - You can use the **Filter** button to limit the display to nodes that match specific criteria—refer to **Finding Project Items by Name** for more information. Click the **Select All** button to select all items which matched your filter criteria.
   - If a required node has a nickname, you can enter it in the **Select item from nickname** drop-down list and click the **Select** button.
8. Click **OK**.
   - The content is coded at the selected nodes.

To code at existing nodes, you can use **Drag and Drop**:

1. Open the source or node 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.
   - The content is coded at the node. If you open the node (by double-clicking on it) you can see coded content.
To code at existing nodes:

1. Open the source or node you want to code—it is displayed in **Detail View**.
2. Select the content you want to code.
3. On the **Coding** toolbar, select **Name** from the **Code At** drop-down list.
4. Enter the node name (if you know the exact name). You can also select a recently used node from the drop-down list.

OR

Click the **Select Nodes** button:  

The **Select Project Items** dialog box is displayed:

a. If you want to automatically select child nodes (for tree nodes and cases), click the **Automatically select hierarchy** option.

b. On the left, click the name of the required folder—for example, Tree Nodes, Free Nodes, or Cases.

c. On the right, click the check boxes for the required nodes.

You can use the **Filter** button to limit the display only to nodes that match specific criteria—refer to **Finding Project Items by Name** for more information. Click the **Select All** button to select all items matching your filter criteria.

If a required node has a nickname, you can enter it in the **Select item from nickname** drop-down list and click the **Select** button.

d. Click **OK**.

If you selected a single node, its name is displayed in the **Coding** toolbar—for multiple nodes, the number of nodes selected is displayed. When you click in the drop-down list containing number of nodes selected, you can enter a new node name.

5. Click the **Code** button.

To code at nicknamed nodes:

1. Open the source or node you want to code—it is displayed in **Detail View**.
2. Select the content you want to code.
3. On the **Coding** toolbar, select **Nickname** from the **Code At** drop-down list.
4. Select the nickname from the drop-down list.
5. Click the Code button.

**Coding at New Nodes**

While exploring and coding a source, you can create new nodes. The content you can code includes:

- Text in documents, video/audio transcripts or picture log entries
- Images in documents
- Pictures or picture regions in a picture source
- Audio or video content as represented by the timeline
To create and code at new nodes use:

**Coding Toolbar**

1. Open the source or node you want to code—it is displayed in **Detail View**.
2. Select the content you want to code.
3. On the **Coding** toolbar, choose the **Name** option from the **Code At** drop-down list.
4. Enter a name for the new node in the next drop-down list.
5. Press the ENTER key to create and code at a new free node.

   OR

Define a different node type by selecting a location from the **In** drop-down list and clicking the **Code** button.

<table>
<thead>
<tr>
<th>Choose Name</th>
<th>Enter the name</th>
<th>Select the location</th>
<th>Click to code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code At:</td>
<td>Name</td>
<td>Location</td>
<td></td>
</tr>
</tbody>
</table>

**Menus**

1. Open the source or node you want to code—it is displayed in **Detail View**.
2. Select the content you want to code.
3. On the **Code** menu, click **Code Selection**.
4. Click the **At New Node** option.
   
   The **New Node** dialog box is displayed.
5. In the **Location** field, click the **Select** button. If you want to create a free node you can accept the default.
   
   The **Select Location** dialog box is displayed.
6. To create a node at the root level of a folder, click **Folders** on the left and click the required folder on the right.
   
   OR

   To create the node as the child of an existing node, click the required folder on the left (**Tree Nodes** or **Cases**) and click the required tree node or case on the right.

   You can use the **Filter** button to limit the display to nodes that match specific criteria. For example, if you want to store the new node under an existing node (but you are having trouble locating it) you can use the filter to find it by name—refer to **Finding Project Items by Name** for more information. Click the **Select All** button to automatically select items matching the criteria.

   If the parent for the new node has a nickname, you can select it from the **Select item from nickname** drop-down list.
7. Click **OK**.
8. In the **Name** field, enter a name for the node.
9. If required, enter a description of the node.
10. Click **OK**.

   Selected content is coded at the newly created node.

To create a new free node based on selected text, you can use **In Vivo coding**.
In Vivo Coding

You can create a new free node based on selected content—this is called In Vivo coding. The selected text is used as the node name (up to 256 characters).

To create a node In Vivo:
1. Open the source or node you want to code—it is displayed in Detail View.
2. Select the text content you want to code.
3. On the Code menu, click the Code In Vivo option.

A free node is created based on the selected text. If required, you can edit the node name in the Node Properties.

In Vivo toolbar button:
1. Select the content you want to code.
2. On the Coding toolbar, click the Code In Vivo button:

   ![In Vivo toolbar button](images/toolbar.png)

Right-click:
1. Right-click the text you want to code.
2. Click the Code In Vivo option.

Coding an Entire Source

To code all the content in a source at

A new node

1. In List View, select the required source. Click and drag to select multiple consecutive sources or hold down the CTRL key to select multiple non-consecutive sources.

   OR

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

2. On the Code menu, move the mouse pointer over Code Sources to view options.
3. Click the At New Node option.

   The New Node dialog box is displayed.

4. Name and describe the node.
5. Click the Select button to choose a new location for the node.

   The Select Project Items dialog box is displayed.

6. To create a node at the root level of a folder, click Folders on the left and click the required folder on the right.

   OR

   To create the node as the child of an existing node, click the required folder on the left (Tree Nodes or Cases) and click the required tree node or case on the right.
7. You can use the Filter button to limit the display to nodes that match specific criteria. For example, if you want to store the new node under an existing node (but you are having trouble locating it) you can use the filter to find it by name—refer to Finding Project Items by Name for more information. Click the Select All button to automatically select items matching the criteria.

If the parent for the new node has a nickname, you can select it from the Select item from nickname drop-down list.

8. Click OK.

The sources are coded at the selected nodes.

Existing node or nodes

1. In List View, select the required source. Click and drag to select multiple consecutive sources or hold down the CTRL key to select multiple non-consecutive sources.

OR

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

2. On the Code menu, click the Code Sources option.

3. Click the At Existing Nodes option.

The Select Project Items dialog box is displayed.

4. On the left, click the folder containing the required nodes. Click the folder check box to code at all items in a folder.

5. On the right, click the check boxes for the required nodes. To select all nodes under a parent node, click the Automatically select hierarchy check box.

You can use the Filter button to display only nodes that match specific criteria. For example, if you want to code at a specific node (but you are having trouble locating it) you can use the filter to find it by name.—refer to Finding Project Items by Name for more information. Click the Select All button to automatically select items matching the criteria.

If the node has a nickname, you can select it from the Select item from nickname drop-down list.

6. Click OK.

The sources are coded at the selected nodes.

Right-click:

1. Select the required sources in List View or open the required source in Detail View.
2. Right-click and click the Code Sources option.
3. Select the At Existing Node option.

Coding toolbar:

1. Select the required sources in List View or open the required source in Detail View.
2. On the Coding toolbar select the required nodes.
3. Click the Code button:
Quick Coding with Nicknames

When you create a node (or edit its properties) you can give it a nickname. This nickname can be used as a fast way of coding your source content. For example, nodes that you use frequently can have shortened names that are easy to type in (or select from) the Coding toolbar.

To code content using a nickname:
1. Open the required source or node—it is displayed in Detail View.
2. Select the content you want to code.
3. On the Coding toolbar, select Nickname from the Code At drop-down list.
4. Select the required nickname from the next drop-down list.
5. Click the Code button or press the ENTER key.

Content is coded at the node identified by the selected nickname.

Coding Audio and Video Sources

When working in an audio or video source you can code the media directly or code the text in the transcript (if there is one).

To Code Directly on the Audio or Video
1. Use the play controls on the Media toolbar to locate the portion of the audio or video you want to code. You can also drag the media playhead to the required position on the timeline.
2. Click and drag the timeline to select the required timespan:
   ![Timeline with selected timespan]
   Code the timespan from 00:55.0 to 01:37.0.
4. Choose whether you want to code at new or existing nodes. Refer to Coding at Existing Nodes and Coding at New Nodes for more information.

To Code the Transcript
1. Select the required transcript text.
3. Choose whether you want to code at new or existing nodes.

You cannot code specific text inside custom columns, but you can use custom columns to auto code the whole transcript. Refer to Auto Code by Transcript Column for details.
Shadow Coding

When you code a portion of the timeline, the associated transcript text is also indirectly coded, this is called shadow coding. Similarly if you code the transcript, the associated section of the media is shadow coded.

For example, if you code the timeline and display coding stripes you can see the shadow coding on the transcript:

![Direct coding on timeline](image1)

When you run a coding query, shadow coding is included in the results.

Hiding Shadow Coding

To hide shadow coding:

On the View menu, click the Shadow Coding option.

Coding Picture Sources

When working in a picture source you can code the picture directly or code the text in the picture log (if there is one).

To Code Directly on the Picture

1. Click and drag on the picture to select the required region.
3. Choose whether you want to code at new or existing nodes. Refer to Coding at Existing Nodes and Coding at New Nodes for more information.
4. If you view coding highlight (by clicking the Highlight option on the View menu) you can see the coded area of the picture:
Coding for the selected node is displayed with a yellow highlight.

You can adjust the shading density of the coded picture region. Refer to Adjusting Picture Region Shading for more information.

To Code the Picture Log

1. Select the required log text.
3. Choose whether you want to code at new or existing nodes.

Shadow Coding

When you code a portion of the picture, the associated log text is also indirectly coded, this is called shadow coding.

For example, if you code the picture and display coding stripes you can see the shadow coding on the log:
Coding for the selected node is displayed with a yellow highlight.

The shadow coding is displayed as a lighter coding stripe.

Click on the Log tab to see what has been coded (or shadow coded) in the picture log.

Hiding Shadow Coding

To hide shadow coding:

On the View menu, click the Shadow Coding option.

Range Coding

When coding your sources, you can use range coding to quickly code 'chunks' of content. For example:

- In a document source, you could code paragraphs 3-5 at the node Community. In NVivo, a paragraph is the text or images between two carriage returns. You can check the paragraph numbering by printing the source (or using print preview) when the source is open in Detail View. Note: You must check the Paragraph Numbers check box on the Print Options dialog box.

- In an audio or video file source, you could code transcript rows 1-3 at the node Social Interaction. You could also click and drag on the timeline and code 1:05-2:05 at the node Motivation. The coding is applied to the video or audio file and the associated transcript is shadow coded.

- In a picture source, you could code log entry rows 3-5 at Altruistic.

Range options will change depending on the type of source you are working on.
You do not need to open a source in order to perform range coding—you can select the source in **List View** and choose the range coding option. You can also select multiple sources (of the same type) in **List View** and range code all the selected sources.

**To Code a Source by Range**

1. In List View, select the required source. You can range code multiple sources of the same type—hold down the CTRL key and click to select multiple sources or SHIFT to select a range of sources.

   **OR**

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

2. Click the **Code** menu.

3. Click the **Range Code** option.
   
   The **Range Code** dialog box is displayed.

4. In the **Code** drop-down list, select the required options. These options depend on the type of source you are working with.

5. On the right, enter the required range. You do not enter a range when you choose to code the entire source, audio/video content, transcript, image or log.

6. In the **Code at** field, click the **Select** button.
   
   The **Select Project Items** dialog box is displayed.

7. On the left, click the folder for the required nodes. Click the folder check box to code at all nodes in a folder.

8. On the right, click the check boxes for the required nodes. To select all nodes under a parent node, click the **Automatically select hierarchy** check box.

   You can use the **Filter** button to limit the display to nodes that match specific criteria. For example, if you want to code at an existing node (but you are having trouble locating it) you can use the filter to find it by name—refer to Finding Project Items by Name for more information. Click the **Select All** button to automatically select items matching the criteria.

   If a required node has a nickname, you can enter it in the **Select item from nickname** drop-down list and click the **Select** button.

9. Click **OK**.

10. Click the **Code** button.

11. Click **Close**.

---

**A Quick Way To Do This**

**Range Code toolbar button:**

1. Open the required source or select it in **List View**.

2. On the **Coding** toolbar click the **Range Code** button:

   ![Range Code toolbar button](image)

**Right-click:**

1. In **List View**, right-click on the required source.

2. Click the **Range Code** option.
Auto Code by Paragraph Style

If you have applied paragraph styles consistently in your document sources, you can use them to auto code. This is a quick way to make nodes for each question in an interview or participant in a focus group and code the responses.

**Automatically create nodes for questions based on the Heading 1 paragraph style and code all participants’ answers at the node.**

**Do the same for questions based on the Heading 2 style.**

---

**Q.1 Current use of time**

*In an “ordinary” week, how do you currently spend your time? (What takes most time, how much time spent on work, family, leisure etc) I am still studying so an ordinary week for me is mainly spent studying send about 32 hours a week at work, 6 contact hours at university, and evenings studying. I also play Netball and attend a Yoga class of an ev*

**Q.2 Time use ten years on**

*Please think ahead, to your life ten years from now. How does your use (What will your goals be then? Will you be employed? What will you do working...?) In ten years time I expect to be well established in my career, have a family to be working in a senior role. But I hope to have a balance between wo*

---

To code selected sources by paragraph:

1. In **Navigation View**, click the folder containing the sources you want to auto code. Click and drag to select multiple consecutive sources or hold down the CTRL key to select non-consecutive sources.

2. On the **Code** menu, click **Auto Code**.

   The **Auto Code** dialog box is displayed.

3. From the **Code by** drop-down list, click the **Paragraph Style** option.

4. From the **Available paragraph styles** list, select the required paragraph styles. To select multiple styles, click and drag or hold down the CTRL key.

5. Click the right arrow to add the styles to the **Select Paragraph Styles** list.

   A node is created for each paragraph that is formatted in the selected style and the text under the style is coded at the node. The order of the styles in the list determines how they are nested as tree nodes—the first style is the parent of the second and so on.

6. In the **Code at Nodes** panel, you can choose to store the created nodes as children of:

   **An existing node**
   
   1. Select **Existing Node** from the drop-down list.
   2. In the **Name** field, click the **Select** button.

      The **Select Project Item** dialog box is displayed.
   3. On the left, select the required folder.
4. On the right, select the required parent node. If the parent node has a nickname you can select it from the **Select item from nickname** drop-down list. Click the **Filter** button to find nodes based on specific criteria—click the **Select All** button to automatically select items matching the criteria.

5. Click **OK**.

A new node

1. Select **New Node** from the drop-down list.
2. In the **Location** field, click the **Select** button.
   
   The **Select Location** dialog box is displayed.
3. To store the new node at the root level of a folder, click **Folders** on the left and select the required folder on the right.
   
   OR

   To create the new node as a child of an existing node, select the **Tree Nodes** or **Cases** folder on the left and select the existing node on the right. If the parent node has a nickname you can select it from the **Select item from nickname** drop-down list. Click the **Filter** button to find nodes based on specific criteria—click the **Select All** button to automatically select items matching the criteria.

4. Click **OK**.

5. In the **Name** field, enter a name for the new node.

6. Click **OK**.

   The selected sources are auto coded. To see the new nodes, click on the **Nodes** button in **Navigation View**.

> **A Quick Way To Do This**

**Using the Coding Toolbar:**

1. On the Coding toolbar, click the **Auto Code** button:

   ![Auto Code button](image)

**Right-click:**

1. In **List View**, right-click the required source.

2. Click the **Auto Code** option.

**Auto Code by Paragraph**

You can auto code your document sources by paragraph if they are tightly structured—for example, where each paragraph explores a different theme. **NVivo** makes a node for each paragraph and uses the paragraph number as the node name. You can rename the nodes as required.

To auto code sources by paragraph:

1. In **Navigation View**, click the folder containing the document sources you want to auto code.
2. In **List View**, select the required source. Click and drag to select multiple consecutive sources or hold down the CTRL key to select non-consecutive sources.

3. On the **Code** menu, click **Auto Code**. The **Auto Code** dialog box is displayed.

4. Click the **Paragraphs** option.

5. In the **Code at Nodes** panel, you can choose to store the created paragraph nodes as children of

   **An existing node**
   1. Select **Existing Node** from the drop-down list.
   2. In the **Name** field, click the **Select** button.
      The **Select Project Item** dialog box is displayed.
   3. On the left, select the required folder.
   4. On the right, select the required parent node. If the parent node has a nickname you can select it from the **Select item from nickname** drop-down list. Click the **Filter** button to find nodes based on specific criteria—click the **Select All** button to automatically select items matching the criteria.
   5. Click **OK**.

   **A new node**
   1. Select **New Node** from the drop-down list.
   2. In the **Location** field, click the **Select** button.
      The **Select Location** dialog box is displayed.
   3. To store the new node at the root level of a folder, click **Folders** on the left and select the required folder on the right.
   
      OR
   
   To store the new node as a child of an existing node, select the **Tree Nodes** or **Cases** folder on the left and select the existing node on the right. If the parent node has a nickname you can select it from the **Select item from nickname** drop-down list. Click the **Filter** button to find nodes based on specific criteria—click the **Select All** button to automatically select items matching the criteria.
   4. Click **OK**.
   5. In the **Name** field, enter a name for the new node.
   6. Click **OK**.

   The paragraphs in the selected sources are auto coded to the selected nodes. To see the new nodes, click on the **Nodes** button in **Navigation View**.

   Where a source has more than 9 paragraphs, nodes are not displayed in numeric order (since node names are sorted alphabetically by default). To display the nodes in numerical order click on the **Created** column heading.

---

**A Quick Way To Do This**

**Using the Coding Toolbar:**

1. On the Coding toolbar, click the **Auto Code** button:
1. In **List View**, right-click the required source.
2. Click the **Auto Code** option.

### Auto Code by Transcript Column

If you have created custom columns in your audio/video transcripts, you can use them to quickly code an audio/video source.

For example, if you have added a custom column **Speaker**, **NVivo** can create a case for each speaker and code the content at the case:

<table>
<thead>
<tr>
<th>Time</th>
<th>Speaker</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Pela</td>
<td>Gaining back to the community</td>
</tr>
<tr>
<td>6</td>
<td>Cecilia</td>
<td>So you've got two sides here, where you're giving up something of yourself but you're also giving back</td>
</tr>
<tr>
<td>7</td>
<td>Cecilia</td>
<td>Also things with wider causes like global warming and helping third world countries</td>
</tr>
<tr>
<td>8</td>
<td>Cecilia</td>
<td>So things that you think, you feel passionate about, that you want to help with?</td>
</tr>
<tr>
<td>9</td>
<td>Mat</td>
<td>Often things you wouldn't normally be involved in, you wouldn't do in your day-to-day lifestyle</td>
</tr>
</tbody>
</table>

To auto code by transcript column:

1. In **Navigation View**, click the folder containing the sources you want to auto code. Click and drag to select multiple consecutive sources or hold down the CTRL key to select non-consecutive sources.
2. On the **Code** menu, click **Auto Code**.
   
The **Auto Code** dialog box is displayed.
3. From the **Code by** drop-down list, click the **Transcript Fields** option.
4. From the **Available transcript fields** list, select the required custom columns. To select multiple columns, click and drag or hold down the CTRL key.
5. Click the right arrow to add the styles to the **Select Transcript Fields** list.

   A node is created for each unique text string in the custom column and the text in the **Content** column is coded at the node. The order of custom columns in the list determines how they are nested as tree nodes— the first column is the parent of the second and so on.
6. In the **Code at Nodes** panel, you can choose to store the created nodes as children of:

   - An existing node
   
   1. Select **Existing Node** from the drop-down list.
   2. In the **Name** field, click the **Select** button.
The Select Project Item dialog box is displayed.

3. On the left, select the required folder.

4. On the right, select the required parent node. If the parent node has a nickname you can select it from the Select item from nickname drop-down list. Click the Filter button to find nodes based on specific criteria—click the Select All button to automatically select items matching the criteria.

5. Click OK.

A new node

1. Select New Node from the drop-down list.
2. In the Location field, click the Select button.
   
The Select Location dialog box is displayed.

3. To store the new node at the root level of a folder, click Folders on the left and select the required folder on the right.

OR

To create the new node as a child of an existing node, select the Tree Nodes or Cases folder on the left and select the existing node on the right. If the parent node has a nickname you can select it from the Select item from nickname drop-down list. Click the Filter button to find nodes based on specific criteria—click the Select All button to automatically select items matching the criteria.

4. Click OK.

5. In the Name field, enter a name for the new node.

6. Click OK.

The selected sources are auto coded. To see the new nodes, click on the Nodes button in Navigation View.

A Quick Way To Do This

Using the Coding Toolbar:

1. On the Coding toolbar, click the Auto Code button:
   
Right-click:

1. In List View, right-click the required source.
2. Click the Auto Code option.

Uncoding Selected Content

You can remove coding from selected text, media content or images in a source or node. For example, you can remove coding at community from a selected passage of text.

To uncode selected content:

1. Open the required source or node—it is displayed in Detail View.
2. Select the content that you want to uncode.
4. Click **At Existing Nodes**.
   
   The **Select Project Items** dialog box is displayed.

5. On the left, select the folder (**Free Nodes**, **Tree Nodes**, **Cases** or **Relationships**) containing the nodes you want to uncode. If you want to uncode at all nodes within a folder, click the folder check box—all nodes coding the content are automatically selected.

6. On the right, select the nodes you want to uncode. Only nodes that code the content are available for selection. To select all nodes under a parent node, click the **Automatically select hierarchy** check box.

   You can use the **Filter** button to limit the display to nodes that match specific criteria—refer to **Finding Project Items by Name** for more information. Click the **Select All** button to automatically select items matching the criteria.

   If a required node has a nickname, you can enter it in the **Select item from nickname** drop-down list and click the **Select** button.

7. To uncode items by users, select the required option in the **Uncode at** field:
   - **All Users**—removes coding done by all users
   - **Current User**—removes coding done by the current user
   - **Selected Users**—removes coding done by selected users. Click on the **Select** button to choose the required users.

8. Click **OK**.

---

### A Quick Way To Do This

#### Using the Coding Toolbar:

If you have a node or nodes currently selected in the **Coding** toolbar:

1. Select the content you want to uncode.
2. Click the **Uncode** toolbar button.

<table>
<thead>
<tr>
<th>Choose Name</th>
<th>Select existing nodes</th>
<th>Click to uncode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code At: Name</td>
<td>[2 nodes selected]</td>
<td>![Button]</td>
</tr>
</tbody>
</table>

#### Using Coding Stripes:

You can uncode content using coding stripes:

1. **Display coding stripes** (View menu).
2. Right-click on the coding stripe for the node you want to uncode.
3. Click the **Uncode** option.

**Right-click:**

1. Right-click the content you want to uncode.
2. Click the **Uncode Selection** option.

---

If the nodes you want to uncode are already selected in the **Coding** toolbar, then you can uncode at these nodes by selecting **Code>Uncode Selection>At Current Nodes**.

When you have a node open in **Detail View**, you can uncode selected node content by selecting **Code>Uncode Selection>At This Node**.
Uncoding Entire Content

You can uncode the entire content of one or more sources displayed in List View. You can also uncode the entire content of a source which is open in Detail View.

**Multiple sources in List View**

1. In Navigation View, click the required source folder.
2. In List View select the required sources. Click and drag to select multiple consecutive items or hold down the CTRL key to select non-consecutive items.
3. On the Code menu, click Uncode Sources.
4. Click At Existing Nodes.
   The Select Project Items dialog box is displayed.
5. On the left, select the folder (Free Nodes, Tree Nodes, Cases or Relationships) containing the nodes you want to uncode. If you want to uncode at all nodes within a folder, click the folder check box—all nodes coding the content are automatically selected.
6. On the right, select the nodes you want to uncode. Only nodes that code the content are available for selection. To select all nodes under a parent node, click the Automatically select hierarchy check box.
   You can use the Filter button to limit the display to nodes that match specific criteria—refer to Finding Project Items by Name for more information. Click the Select All button to automatically select items matching the criteria.
   If the node has a nickname, you can enter it in the Select item from nickname drop-down list and click the Select button.
7. To uncode by users, click the required option in the Uncode at field:
   - **All Users**—removes coding done by all users identified in the open project
   - **Current User**—removes coding done by the current user named in the open project
   - **Selected Users**—removes coding done by selected users in the open project. Clicking on the Select button will display the Select Project Item dialog box to enable you to choose the required users.
8. Click OK.
   Coding for the selected nodes is removed from the sources.

If the nodes you want to uncode are already selected in the Coding toolbar, then you can uncode at these nodes by selecting Code>Uncode Selection>At Current Nodes

**An open source in Detail View**

1. Open the required source and click in Detail View.
2. On the Code menu, click Uncode Sources.
3. Click At Existing Nodes.
   The Select Project Items dialog box is displayed.
4. On the left, select the folder (Free Nodes, Tree Nodes, Cases or Relationships) containing the nodes you want to uncode. If you want to uncode at all nodes within a folder, click the folder check box—all nodes coding the content are automatically selected.
5. On the right, select the nodes you want to uncode. Only nodes that code the content are available for selection. To select all nodes under a parent node, click the Automatically select hierarchy check box.
You can use the Filter button to limit the display to nodes that match specific criteria—refer to Finding Project Items by Name for more information. Click the Select All button to automatically select items matching the criteria.

If the node has a nickname, you can enter it in the Select item from nickname drop-down list and click the Select button.

6. To uncode by users, click the required option in the Uncode at field:
   - All Users—removes coding done by all users identified
   - Current User—removes coding done by the current user
   - Selected Users—removes coding done by selected users. Clicking on the Select button will display the Select Project Item dialog box to enable you to choose the required users.

7. Click OK.
   Coding for the selected nodes is removed from the entire source.

If the nodes you want to uncode are already selected in the Coding toolbar, then you can uncode at these nodes by selecting Code>Uncode Selection>At Current Nodes

A Quick Way To Do This

Right-click:
1. Right-click in the source.
2. Click the Uncode Sources option.
3. Click the At Existing Nodes option.

You can remove all coding at a node for all sources in your project by deleting the node. Refer to Deleting Nodes for more information.

Highlight Coding

When working with sources and nodes in Detail View, you can highlight the content that has been coded at selected nodes, attributes or users—highlighted content is displayed with a yellow background.

You can also choose to highlight coding done by all or specific users.

Highlight Coding for Selected Items

1. Open the required source or node—it is displayed in Detail View.
2. On the View menu, click the Highlight option.
3. Click the Coding for Selected Items option.
   The Select Project Items dialog box is displayed.
4. On the left, click the folder containing the required items. Click a folder checkbox to see highlighting for all items in the folder.
5. On the right, click the checkbox for the required items. Only items that code the content are available for selection—all other items are greyed out. To select all items under a parent, click the Automatically select hierarchy checkbox. You can click the Filter button to find items
based on specific criteria—click the Select All button to automatically select items matching the criteria.

6. If you want to highlight a node and it has a nickname, you can select it from the Select item from nickname drop-down list.

7. Click OK.
   Coding for the selected nodes is highlighted in yellow.

Highlight Coding from a Coding Stripe

You can also use coding stripes to highlight coding at specific nodes, attributes or users:
1. Open the required source or node— it is displayed in Detail View.
2. On the View menu, click Coding Stripes.
3. Click the required display option.
4. In the Coding Stripes panel, right-click on the required coding stripe.
5. Click the Highlight Coding option.
   Coding for the selected node is highlighted.

Highlight all Coding

1. Open the required source or node— it is displayed in Detail View.
2. Click the View menu.
3. Click the Highlight option.
4. Click the Coding for all Nodes option.
   Coding for all nodes is highlighted in yellow.

In the Application Options (Display tab), you can specify that you want coding automatically highlighted when you open a source or node.

To Turn Off Highlighting

1. Click the View menu.
2. Click the Highlight option.
3. Click None.

For picture sources, you can adjust the shading density of the highlighted picture region. Refer to Adjusting Picture Region Shading for more information.
Working with Coding Stripes

About Coding Stripes

Coding stripes are colored bars that enable you to see the coding for a source or node. You can also display stripes to see what specific users have coded or to see the attributes of coded content.

You can select the required stripes or display the nodes that *most, least or recently* code the content. Refer to Setting the Default Number of Coding Stripes for more information about the coding stripe display.

When you display coding stripes for a source or node, its content becomes 'read-only'—as indicated in the status bar. While you can still code, add 'See Also' links and annotations, you cannot edit the source’s content.

Right-click on the coding stripe for a node to:

- **Highlight Coding** for that node
- **Open** the node
- **Uncode** all content coded at the node
- **Hide** the coding stripe
- **Show sub-stripes** (to 'split' the stripe into coding done by selected users)
- **Hide sub-stripes**

Displaying Coding Stripes

To display coding stripes for a source or node:

1. Open the required source or node— it is displayed in **Detail View**.
2. If you want to view coding stripes for selected content, select the required content.
3. On the **View** menu, click **Coding Stripes**.
4. Click the required **display option**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected Item / Select Item...</td>
<td>The <strong>Select Project Items</strong> dialog box is displayed and you can select from nodes, attributes or users that code the item. Expand parent items to see the child items. If the required items are in a set, you can select the set. Use the <strong>Filter</strong> button to display only items matching a specific criteria. For example, you could filter the node selection to only nodes created <em>today</em>. Click the <strong>Select All</strong> button to automatically select items matching the criteria.</td>
</tr>
</tbody>
</table>
Nodes Most Coding
Of all the nodes that code this item, display the most frequently used.

Nodes Least Coding
Of all the nodes that code this item, display the least frequently used.

Nodes Recently Coding
Of all the nodes that code this item, display the most recently used.

Coding Density Only
Show only the Coding Density bar.

Show Items Last Selected
Show the nodes that were last selected for viewing. This option can be useful when you want to check coding at the same nodes across multiple sources.

Number of Stripes
When you choose either of the most, least or recently options, this function becomes active and allows you to change the number of coding stripes displayed.

When you choose the most, least or recently options, the default number of stripes displayed is 7. You can change this default in the Application Options (Display tab) or in the View menu (Coding Stripes). When you choose these options, nodes that code the entire item are not included in the display.

5. If displaying more than 7 stripes, you can:

Drag the border to resize the coding stripes panel
Use the horizontal scroll bar to see more coding stripes

In the Application Options (Display tab), you can specify that you want coding stripes to display automatically when you open a source or node. You can also set the default for the number of coding stripes that are displayed.
Displaying Sub-Stripes

You can choose to display the sub-stripes of a coding stripe—for example, from a coding stripe for the node Motivation; you can show sub-stripes to see which users have coded the current content to that node. From a coding stripe for user KMC, you can split the stripe into sub-stripes that show each node KMC coded at.

To display sub-stripes:
1. Right-click on the required coding stripe.
2. Click Show Sub-Stripes.
3. Select the sub-stripe to display. This menu will display up to 9 sub-stripes only.
   To select other sub-stripes, click on More Sub-Stripes.
   The Select Project Item dialog will display.

You can hover over a node coding stripe to see the users who coded the content, or hover over a user coding stripe to see the nodes the user coded the content at.

Setting the Default Number of Coding Stripes

By default, seven coding stripes are displayed when you choose to view the most, least or recently coded nodes.

To increase the default number of stripes for all sources and nodes that are subsequently opened:
1. On the Tools menu, click Options.
2. Click the Display tab.
3. In the Maximum number of stripes field, enter the required number of coding stripes (between 7 and 200).
4. Click OK.
   The new default is available for newly opened sources and nodes.

You can also change the number of stripes for a specific source or node, refer to Changing the Number of Stripes for more information.

Checking the Coding Density

When you display coding stripes, the Coding Density bar is visible on the left of the display. You can hover over the Coding Density bar to see the nodes that code the related content. The color graduations indicate the coding density from light gray (minimal coding) to dark gray (maximum coding).

The coding density is calculated based on all nodes that code the content—not just those that are currently displayed in the coding stripes.

View Coding Density Only

If required, you can limit the coding stripes display to just the Coding Density bar:
1. On the View menu, click Coding Stripes.
2. Click the Show Coding Density Only.
Display Stripes Using the Coding Density Bar

To display stripes:
1. Right-click on the required position in the Coding Density bar.
2. Click the Show Stripe option.
3. Click the required nodes.

Changing the Number of Stripes

To change the number of stripes for a specific source or node:
1. On the View menu, click Coding Stripes.
2. Click the Number of Stripes option.
   The Number of Stripes dialog box is displayed.
3. Enter the required number (up to 200).
4. Click OK.
5. On the View menu, click Coding Stripes.
6. Click the required display option.

You can also change the number of stripes that are displayed for all sources and nodes—refer to Setting the Default Number of Coding Stripes.

Printing Coding Stripes

You can print a source or node along with its coding stripes.

Each page of content is printed followed by its coding stripe pages:

To print a source or node with coding stripes:
1. Open the required source or node.
2. Display the required coding stripes—refer to Displaying Coding Stripes.
3. On the File menu, click Print.
   The Print Options dialog box is displayed with the Coding stripes check box automatically selected.
4. Click OK.
Sets

About Sets

Sets provide a flexible (perhaps temporary) way of grouping your sources and nodes—for example, you might create a set for the documents, memos and nodes that belong to a specific team member.

Items in a set are references or 'shortcuts' to the original files—you do not physically move items into a set. This means you can delete an item from a set without removing it from your project.

A set can include any number of sources or nodes and a source or node can belong in multiple sets.

Adding Sets

NVivo provides a number of ways to create sets. For example, you can create a set and then add items to it or you can create a set based on selected project items.

Creating a set

1. In Navigation View, click the Sets button.
2. Click the Sets folder.
3. On the Project menu, click New Set.
   The New Set dialog box is displayed.
4. Enter a name for the set in the Name field.
5. If required, enter a description of the set in the Description field.
6. Click OK.

Creating a set from selected items

When project items are listed in List View or Detail View (for example, find or query results) you can add selected items to a set.

1. Select the required items. Click and drag to select multiple consecutive items or hold down the CTRL key to select non-consecutive items.
2. On the Project menu, click Create As.
3. Click Create As Set.
   The New Set dialog box is displayed.
4. In the Name field, enter a name for the set.
5. If required, enter a description of the set in the Description field.
6. Click OK.
7. To see the set, click the Sets button in Navigation View.
8. Click the required set to see its contents displayed in List View.

Creating a set from query results

You can create a set from the results of a text search, coding or compound query.

1. Open the required query.
2. Click the Query Options tab.
3. From the Option drop-down list, click the Create Results as New Set option.
4. In the Name field, enter the name of the new set.
5. If required, enter a description of the new set.
6. Click the Run button.

A Quick Way To Do This

Right-click:
1. Right-click the required items in List View.
2. Click Create As.
3. Click Create As Set option.

Drag and Drop from Detail View:
1. Select required items in Detail View.
2. Drag them into the required set folder.

Adding Items to Sets

You can add any combination of sources, nodes, and query results to a set.

To add items to a set:
1. In Navigation View, select the folder that contains the required items.
2. In List View, select the required item. Click and drag to select multiple consecutive items or hold down the CTRL key to select non-consecutive items.
3. On the Project menu, click Add to Set. The Select dialog box is displayed.
4. Click the required set.
5. Click OK.

If you select a parent node (for tree nodes or cases), its children are not automatically included in the set.

You cannot add a set to another set.

A Quick Way To Do This

Right-click:
1. Right-click the required item(s) in List View.
2. Click the Add to Set option.

Drag and drop from Detail View:
1. In Detail View, select the required items. This might include query results or node summaries.
2. Drag them to the required set folder.
Removing Items from Sets

When you remove an item from a set, it is still available in its original folder—set items are just 'shortcuts' to your data.

To remove items from a set:
1. In Navigation View, click the Sets button.
2. Click the required set.
3. In List View, click the required items. Click and drag to select multiple consecutive items or hold down the CTRL key to select non-consecutive items.
4. On the Edit menu, click Delete.
5. Click Yes to confirm.

DELETE key:
1. Select the required items in List View.
2. Press the DELETE key.

Right-click:
1. Right-click the required item(s) in List View.
2. Click the Delete option.

Renaming Sets

To edit the name and description defined for a set:
1. In Navigation View, click the Sets button.
2. Click the required set.
3. On the Project menu, click Set Properties.
   The Set Properties dialog box is displayed.
4. Edit the name and/or description.
5. Click OK.

Click twice to edit name:
1. In Navigation View, click the name of the required set.
2. Click it again.
3. The name becomes active and you can edit it.

Right-click:
1. Right-click the required set.
2. Click the Set Properties option.
Copying Sets

To copy a set:
1. In **Navigation View**, click the **Sets** button.
2. Click the set you want to copy.
3. On the **Edit** menu, click **Copy**.
4. Click the **Sets** root folder.
5. On the **Edit** menu, click **Paste**.
   The set is copied into the **Sets** folder with a number appended to the name (to indicate that it is a copy). If required, you can **rename the set**.

### Main toolbar:
1. Click the required set
2. Click the **Copy** button:
3. Click the **Sets** root folder.
4. Click the **Paste** button.

### Right-click:
1. Right-click the required set.
2. Click **Create As Set**.
   The **New Set** dialog box is displayed.
3. Enter a name for the set.
4. Click **OK**.

Deleting Sets

When you delete sets, the items it contains are still available in their original folders—set items are just 'shortcuts' to your data.

To delete a set:
1. In **Navigation View**, click the **Sets** button.
2. Expand the **Sets** folder.
3. Click the set you want to delete
4. On the **Edit** menu, click **Delete**.
5. Click **Yes** to confirm.
Copying Set Items

To copy items from one set to another:
1. Open the set containing the items you want to copy—they are displayed in List View.
2. Click the item you want to copy. Click and drag to select multiple items or hold down the CTRL key to select multiple non-consecutive items.
3. On the Edit menu, click Copy.
4. Click the destination set folder.
5. On the Edit menu, click Paste.

Moving Items Between Sets

To move items from one set to another:
1. Open the set containing the items you want to copy—they are displayed in List View.
2. Select the required items. Click and drag to select multiple items or hold down the CTRL key to select multiple non-consecutive items.
3. On the Edit menu, click Cut.
4. Click the destination set folder.
5. On the **Edit** menu, click **Paste**.

### A Quick Way To Do This

#### Drag and Drop:
1. Click the required items in **List View**.
2. Drag to the destination set folder.

#### Right-click:
1. Right-click the required items in **List View**.
2. Click the **Cut** option.
3. Right-click the destination set folder.
4. Click the **Paste** option.

### Ordering Items in a Set

You can quickly order items in a set by using the column titles. All the sort options available can be accessed when you click on the **View** menu and select **Sort By**.

If you prefer to customize the ordering, you can do this using the **Custom** option. To move items up and down in a set:

1. In **Navigation View**, click the **Sets** button.
2. Click the required set to open it in **List View**.
3. Click in the **List View**.
4. On the **View** menu, click **Sort By**.
5. Click the **Custom** option.
6. Select the item you want to move.
7. Right-click and select the **Move Up** or **Move Down** option.

If you subsequently use another sort option, you can always return to your custom sort order by clicking the **Sort By Custom** button.

Refer to **Making a Picture Gallery** for more information about using sets to display pictures in a selected sequence.

### A Quick Way To Do This

#### View toolbar:
1. Select the item you want to move.
2. Click the **Sort By Custom** toolbar button.
3. Click the **Move Up** or **Move Down** buttons

[![View toolbar with Sort by Custom and Move Up/Move Down buttons](image)]
Annotations

About Annotations

Like scribbled notes in a margin, annotations enable you to comment on selected content in a source or node. To comment on an entire source or to capture emerging themes, you may want to create a memo instead.

Annotating Audio/Video Sources

Annotated text in audio and video transcripts is displayed with the same blue highlight as text in document sources. You can also annotate the audio and video directly by selecting the timeline. The annotated portion of the timeline is highlighted by a blue bar at the top. View sample
Annotating Picture Sources

Similar to transcripts and documents, annotated text in a log entry is displayed with a blue highlight. You can also annotate regions of the picture. The annotated region is boxed and shaded in blue. View sample

You can adjust the shading density of the annotated picture region. Refer to Adjusting Picture Region Shading for more information.

Annotating Nodes

You can annotate text (and images) in a source or node. Since a node is a collection of source references—any annotations added in the node content are automatically applied to the coded source.

Coding Annotations

Although you cannot code the content of annotations directly, you can code the annotated text. When you open the relevant node, the annotations are displayed in the Annotations tab.

You can also include annotations in a text search query or when looking for content within a source or node.
Displaying the Annotations Tab

You can display the annotations tab automatically when you open a source or node. Refer to Application Options (Display tab) for more information.

Adding Annotations

To add an annotation:
1. Open the required source or node—its content is displayed in **Detail View**.
2. Select the required text in documents, audio/video transcripts or picture log entries.
   OR
   For audio and video files, click and drag to select the required timespan on the timeline.
   OR
   For picture sources, click and drag to select the required region of the picture.
3. On the **Links** menu, click **Annotation**.
4. Click the **New Annotation** option.
   An annotation is added in the **Annotations** tab at the bottom of **Detail View**.
5. Enter the annotation text.
6. Press the ENTER key. To add a carriage return in an annotation, press CTRL+ENTER.
   The annotated text is highlighted in blue. The annotated timeline will have a blue bar at the top of the selection. The annotated picture region will be shaded in blue.

### A Quick Way To Do This

**Links toolbar:**
1. Select required text or time line.
2. Click the **New Annotation** button:

   ![Links toolbar image]

**Right-click:**
1. Right-click selected text or time line.
2. For text, click the **Links** option.
   For timeline, click the **Annotation** option.
3. Click the **New Annotation** option.

For audio/video sources, you can only annotate text in the content column of a transcript row. For pictures, you can only annotate text in the content column of a log row.
Editing Annotations

To change the text of an annotation:
1. Open the required source or node—its content is displayed in Detail View.
2. On the View menu, click Annotations to display the Annotations tab.
3. Click the required annotation.
4. Click in the text field.
5. Edit the text as required.
6. Press the ENTER key.

Finding Annotations

You can find annotations based on the text that they contain. For example, you could find all the annotations that contain the text contradiction.

To find annotations:
1. Click the New button on the Main toolbar.
2. Click the Text Search Query option.
   - The Text Search Query dialog box is displayed.
3. In the Search for field enter the text you want to find. To find a phrase, enclose it in quotes 'body language'.
4. From the Search In drop-down list, select Annotations.
5. In the Of drop down list, select which sources you want to search.
6. Click the Run button.
   - Sources that contain the matching annotations are displayed in Detail View.
7. Double-click a source to open it.
   - The annotated text is highlighted and the matching annotation is displayed in the Annotations tab.

Finding Annotations When Working in a Source or Node

To find annotation content when working in a source or node:
1. On the Edit menu, click the Find option.
2. In the Text field, enter the text you want to search for.
3. From the Look in drop-down list, click the Annotations option.
4. Click Find Now.

Refer to Finding Text for more information.
Going to Annotated Text

To go to annotated text in a source or node using the annotation’s number:
1. Open the required source—its content is displayed in Detail View.
2. On the Edit menu, click Go To.
   The Go To dialog box is displayed.
3. Select Annotation from the Go to What list.
4. Enter the annotation number in the Enter annotation number field.
5. Click the Go To button. The annotated text is displayed in Detail View.

Displaying Annotations

To see the annotations for a source or node:
1. Open the required source or node—its content is displayed in Detail View.
2. On the View menu, click Annotations.
   The Annotations tab is displayed at the bottom of Detail View. Click the required annotation to see its related text.
   To hide the Annotations tab, click the Annotations option again.

To Display Annotations Automatically

You can automatically display annotations when you open a source or node:
1. On the Tools menu, click the Options button.
   The Application Options dialog box is displayed.
2. Click the Display tab.
3. Check the View Annotations check box.
4. Click OK.
   This will apply to the next node or source you open.
Working with Annotation Content

When working with annotations you can:

Find text in annotations

1. Open the required source or node—its contents are displayed in Detail View.
2. On the Edit menu, click Find.
   The Find Content dialog box is displayed.
3. In the Text drop-down list, enter the text you want to search for. If required, you can select previous search text from the list. Click the Special button to search for a special character.
4. Select Annotations from the Look in drop-down list.
   OR
   Select Annotations and Text to include the source content in the search.
5. From the Search drop-down list, select the required search direction.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Down</td>
<td>To search from the cursor to the end of the text.</td>
</tr>
<tr>
<td>Up</td>
<td>To search from the cursor to the beginning of the text.</td>
</tr>
<tr>
<td>All</td>
<td>To search all of the text.</td>
</tr>
</tbody>
</table>

6. Click the Match case checkbox to find the exact combination of upper and lower case letters.
7. Click the Find whole word checkbox if you want to find only the occurrences of the complete word that you entered in the Find field. For example, if you search for stick the words tick and sticky will not be found.
8. Click Find Next.

Replace text in annotations

1. Open the required source or node—its contents are displayed in Detail View.
2. On the Edit menu, click Replace.
   The Replace Content dialog box is displayed.
3. In the Find What panel, enter the text you want to find.
4. In the Replace With panel, enter the replacement text.
5. Select Annotations from the Look in drop-down list.
6. From the Search drop-down list, select the required search direction.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Down</td>
<td>To search from the cursor to the end of the text.</td>
</tr>
</tbody>
</table>
Up To search from the cursor to the beginning of the text.

All To search all of the text.

7. Click the **Match case** checkbox to find the exact combination of upper and lower case letters.
8. Click the **Find whole word** checkbox if you want to find only the occurrences of the complete word that you entered in the **Find** field. For example, if you search for *stick* the words *tick* and *sticky* will not be found.
9. Click **Find Next** button to find the next occurrence of the text.
10. Click the **Replace** button to replace the existing text.
   OR
   To change all occurrences of the search text to the replacement text, click **Replace All**.

**Copy and paste annotation text**

1. Open the required source or node—its contents are displayed in Detail View.
2. In the **Annotation** tab, select the required text.
3. Right-click and select **Copy**.
4. Place the cursor in the destination location.
5. Right-click and select **Paste**.

**Insert the date in an annotation**

1. Open the required source or node—its contents are displayed in Detail View.
2. Position the cursor in the required location.
3. On the **Format** menu, click **Insert**.
4. Click the **Date/Time** option. Refer to [Setting Application Options](#) for information about setting the date and time format.

**Deleting Annotations**

To delete an annotation:
1. Open the required source or node—its content is displayed in **Detail View**.
2. On the **View** menu, click **Annotations** to display the **Annotations** tab.
3. Click the required annotation.
4. On the **Edit** menu, click **Delete**.
5. Click **Yes** to confirm.
Deleting Annotations in List View

1. In Navigation View, click the Links button.
2. Click the Annotations folder.
3. Click the required annotation.
4. On the Edit menu, click Delete.

Managing Annotations in List View

To see a list of all sources containing annotations:

1. In Navigation View, click the Links button.
2. Click the Annotations folder.
   All annotations are displayed in List View.
3. Double-click a source to open it in Detail View. The cursor is positioned on the annotated text—click in the text to see the annotation displayed in the Annotations tab.
Memo Links

About Memo Links

In NVivo, memos are a type of 'source'. You create or import them in the same way as documents and externals.

You can create memos to capture your thoughts about data, concepts, research procedures and so on. When a memo is related to (or inspired by) a particular source or node, you can create a 'memo link'.

For example—you might link an interview transcript to a memo that describes your thoughts about the interview process.

You can link each project item (document, external or node) to one memo but that memo cannot be linked to another item. You cannot link a memo to another memo.

View and manage memo links in the Memo Links folder—in Navigation View, click the Links button.

Adding Memo Links

You can create a memo link while working in List View or you can create the link directly from an open source or node in Detail View.

You can link documents, audio, video, pictures, externals or nodes to:

A new memo

1. In List View, click the required source or node.
   OR
   Open the required source or node and click in Detail View.
2. On the Links menu, click Memo Link.
3. Click Link to New Memo.
4. Enter a name and description for the memo.
5. Click OK.

The new memo is displayed in Detail View and you can enter the required content.

An existing memo

1. In List View, click the required source or node.
   OR
   Open the required source or node—its content is displayed in Detail View.
2. On the Links menu, click Memo Link.
3. Click Link to Existing Memo.
   The Select Project Item dialog box is displayed.
4. Click the memo you want to link.
5. Memos that have already been linked are greyed out and you cannot select them.
6. Click OK.
You cannot link a memo to the cell nodes in a matrix.

You cannot link a memo to nodes in the **Queries Results** folder—you need to move them to the **Nodes** folders.

---

### A Quick Way To Do This

**Right-click:**

1. Right-click the required source or node in **List View** or while open in **Detail View**.
2. Click the **Memo Link** option.
3. Choose **Link to New Memo** or **Link to Existing Memo**.

---

### Opening Linked Memos

You can open linked memos:

**While you are working with a source or node in List View**

1. In **List View**, click the item that has the linked memo. Items with linked memos are identified by the link icon.
2. On the **Links** menu, click **Memo Links**.
3. Click the **Open Linked Memo** option. This option is only available if the item is linked to a memo.

   The memo is opened in **Detail View**.

1. In **List View**, click the item that has the linked memo. Items with linked memos are identified by the link icon:

2. On the **Links** menu, click **Memo Link**
3. Click the **Open Linked Memo** option. This option is only available if the item is linked to a memo.

   The memo is opened in **Detail View**.

---

### A Quick Way To Do This

**Links toolbar:**

1. In **List View** click the required item.
2. Click the **Open Linked Memo** toolbar button:

![Open Linked Memo button]

**Right-click:**

1. Right-click a source or node in **List View**.
2. Click **Memo Link**.
3. Click **Open Linked Memo** to open the linked memo.
While exploring a source or node in Detail View

1. Open the required node or source—it’s content is displayed in Detail View.
2. On the Links menu, click Memo Link.
3. Click the Open Linked Memo option. This option is only available if the item is linked to a memo.
   The memo is opened in Detail View.

 Toolbar Button:
1. Click in Detail View.
2. Click the Open Linked Memo toolbar button:

 Right-click:
1. Right-click a source or node in Detail View.
2. Click Links.
3. Click Memo Link.
4. Click Open Linked Memo.

From the Memo Links folder where all memo links are displayed

1. In Navigation View, click the Links button.
2. Click the Memo Links folder.
3. Click the required memo link.
4. On the Links menu, click Memo Link.
5. Click Open Linked Memo.

 Links toolbar:
1. In List View, click the required item.
2. Click the Open Linked Memo toolbar button:

 Right-click:
1. In List View, right-click the required item.
2. Click Open Linked Memo.

If you convert a memo into a document (by moving it into a documents folder), any memo links are lost.
Removing Memo Links

You can remove the link between a memo and a source or node:

While you are working with a source or node in List View

To remove the link between a memo and a document, audio/video source, external or node:

1. In List View, click the item that has the linked memo. Items with linked memos are identified by the memo link icon:

2. On the Links menu, click Memo Link.

3. Click the Delete Memo Link option. This option is only available if the item is linked to a memo.

4. If you want to delete the memo too, click the Delete linked memo checkbox.

5. Click Yes to confirm.

Right-click:

1. Right-click the source or node in List View.
2. Click Memo Link.
3. Click Delete Memo Link.

While exploring a source or node in Detail View

1. Open the required node or source in Detail View.

2. On the Links menu, click Memo Link.

3. Click the Delete Memo Link option. This option is only available if the item is linked to a memo.

4. If you want to delete the memo too, click the Delete linked memo checkbox.

5. Click Yes to confirm.

Right-click:

1. Right-click the source or node in Detail View.
2. Click Links.
3. Click Memo Link.
4. Click Delete Memo Link.

From the Memo Links folder where all memo links are displayed

1. In Navigation View, click the Links button.

2. Click the Memo Links folder.

3. Select the required memo link.

4. On the Links menu, click Memo Link.

5. Click Delete Memo Link.

6. If you want to delete the memo too, click the Delete linked memo checkbox.

7. Click Yes to confirm.
DELETE Key
1. In List View, click the required memo link.
2. Press the DELETE key.
3. Click Yes to confirm.

Right-click:
1. Right-click the required memo link.
2. Click Delete Memo Link.
3. Click Yes to confirm.

Once a memo link is deleted, the memo is available for linking to other item.

Managing Memo Links in List View

To see a list of all the memos that are linked to sources or nodes:
1. In Navigation View, click the Links button.
2. Click the Memo Links folder.
   The source and nodes that are linked to memos are displayed in List View.
3. Double-click to open the required source or node.
See Also Links

About 'See Also' Links

You can use 'See Also' links to remind you of the connections between project items. You can link a portion of one item's content to a whole item or to its selected content. For example, you might link a passage in Anna's interview transcript to:

- A memo about female volunteers
- A paragraph in the document Report on Volunteers
- A timespan in a video file of Volunteers Group Discussion.
- The node female volunteers

When you create a 'See Also' link from selected text, it is displayed with a red highlight. From a selected audio or video timespan, it is displayed with a red bar on top. From a selected region of an image in a picture source, it is displayed as a red shade. View sample

<table>
<thead>
<tr>
<th>See Also Links in...</th>
<th>Displayed as...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>&quot;Volunteer work&quot;: what does that phrase mean to you? To me, &quot;volunteer work&quot; means doing something for, broadly speaking, community benefit, that you give up your time for free for.</td>
</tr>
<tr>
<td>Audio/Vide o timeline</td>
<td></td>
</tr>
<tr>
<td>Picture</td>
<td></td>
</tr>
</tbody>
</table>

You can adjust the shading density of the linked picture region. Refer to Adjusting Picture Region Shading for more information. A source can have any number of 'See Also' links. You can view and manage 'See Also' links in the See Also Links folder—in Navigation View, click the Links button.
You can also create a 'See Also' link from the text in a node—the link is added to the source's content.

Adding 'See Also' Links

You can create a 'See Also' link from selected content to:

- An entire source or node
- Specific text or content in another source

Linking to an Entire Source or Node

To link selected content to an entire source or node:

1. Open the source or node you want to link from —its content is displayed in Detail View.
2. Select the content you want to link from.

   - **For audio and video sources**
     You can select text in the content column of a transcript row or select the entire row.
     You can also select the required timespan in the timeline. This is especially useful when there is no transcribed text.
     To do this, click the mouse at the beginning of the selection then drag and release at the end. The timespan is boxed in blue.

   - **For picture sources**
     You can select text in the content column of a log row or select the entire row.
     You can also select a region of the image.
     To do this, click and drag the cursor to select the region.

3. On the Links menu, click See Also Link.
4. Click the New See Also link option.

   The **New See Also Link** dialog box is displayed.

   - **To link to an existing item**
     1. From the Option drop-down list, click the Existing Item option.
     2. Click the Select button.

        The Select Project Item dialog box is displayed.

     3. On the left, click the folder that contains the required item.
     4. On the right, click the required item. Click the Filter button to display items based on specific criteria—refer to Using Advanced Find: Intermediate for more information.
     5. Click OK.

   - **To link to a new item**
     1. Select New<Item> from the Option drop-down list—this selection depends on the item type you want to create.
     2. Click OK.
3. You are prompted to create the new item and a ‘See Also’ link (to the entire item) is created. The new item is opened in **Detail View**.

→ **A Quick Way To Do This**

**Links Toolbar:**
1. Select the text you want to link.
2. Click the **New See Also Link** toolbar button:

**Right-click:**
1. Right-click the text you want to link.
2. Click the **Links** option.
3. Click **See Also Link**.
4. Click the **New See Also Link** option.

**Linking to Selected Content in a Source or Node**

You can use the 'Copy' and 'Paste As See Also link' commands to link two ‘chunks’ of selected content. For example, you can link two different paragraphs within the same document, or link a picture region in one source to selected text in another source.

To link two ‘chunks’ of selected content:
1. Open the source or node you want to link from—its content is displayed in **Detail View**. If you are linking to content in another project item, open the source or node that you want to link to, so that both items are open in **Detail View**.
2. Select the content that you want to link to (the destination of your link).

   **For audio and video sources**
   You can select to link to a transcript row, text in the content column or a portion of the timeline.

   **For picture sources**
   You can select to link to a log row (region coordinates plus content column), text in the content column or a region of the picture.

3. On the **Edit** menu, click **Copy**.
4. Select the content that you want to link from.
5. On the **Edit** menu, click **Paste As See Also Link**. The See Also link is created.
Right-click:
1. Right-click the content you want to link to.
2. Click Copy.
3. Right-click the content you want to link from.
4. Click Paste As See Also Link.

Drag and Drop:
To do this between sources, you will need to undock one of the windows:
1. Put your cursor on the window you want to undock.
2. Click the Window menu and clear Docked Window.
3. Select the content you want to link from.
4. Select the content you want to link to.
5. Hold the CTRL + SHIFT keys and drag to the content you want to link from.

If you link a reference item (for example: a source inside the node) to another item, the 'See Also' link will be created from the source itself and not the node where the source is referenced.

Opening 'See Also' Links

When working in a source or node in Detail View, you can open the destination of a 'See Also' link:
1. Click in the 'See Also' link. You can identify a 'See Also' link by its red highlight for text and red bar for audio/video timelines.
2. On the Links menu, click Open To Item.
   The destination of the link is opened and displayed in Detail View.
Removing 'See Also' Links

When working with a source or node in **Detail View**, you can remove a 'See Also' link:

1. Click in the 'See Also' link. You can identify a 'See Also' link by its red highlight for text and red bar for audio/video time lines.
2. On the **Links** menu, click **See Also Link**.
3. Click **Delete See Also Link**.
4. Click **Yes** to confirm.

   The link is removed.

---

**A Quick Way To Do This**

<table>
<thead>
<tr>
<th>Links toolbar</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click in the 'See Also' link.</td>
</tr>
<tr>
<td>2. Click the <strong>Delete See Also Link</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Right-click:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Right-click in the 'See Also' link.</td>
</tr>
<tr>
<td>2. Click the <strong>Links</strong> option.</td>
</tr>
<tr>
<td>3. Click the <strong>See Also Link</strong> option.</td>
</tr>
<tr>
<td>4. Click the <strong>Delete See Also Link</strong> option.</td>
</tr>
</tbody>
</table>

---

Managing 'See Also' Links in List View

To view all the 'See Also' links defined for your project:

1. In **Navigation View**, click the **Links** button.
2. Click the **See Also Links** folder.

In the **See Also Links** list view, you can:

- **Edit the destination of a 'See Also' link**
  1. Right-click the required 'See Also' link.
  2. Click **Edit See Also Link**.

    The **See Also Link Properties** dialog box is displayed.
  3. In the **To** panel, select the destination item and content.
  4. Click **OK**.

- **Delete a 'See Also' link**
  1. Right-click the required 'See Also' link.
  2. Click **Delete**.
  3. Click **Yes** to confirm.

    The link is removed from the source item.
Open an item that a 'See Also' link is from

1. Right-click the required 'See Also' link.
2. Click Open From Item.

The source is opened and displayed in Detail View.

Open an item that a 'See Also' link is to

1. Right-click the required 'See Also' link.
2. Click Open To Item.

The destination item is opened in Detail View.

Sort 'See Also' Links

Click on a column heading to sort 'See Also' links. For example, click the From Name column heading to display the 'See Also' links in alphabetical order.
Hyperlinks

About Hyperlinks

You can link selected text to files or web sites outside of your NVivo project—these links are called 'hyperlinks'. If web site addresses change or files are moved, hyperlinks will become invalid.

It is a good idea to create a folder for storing files that you want to link to—this makes them easy to identify when copying your project.

Creating Externals for Files Outside of the Project

Hyperlinks are broken when the destination file has been moved, renamed or deleted. If the link occurs in many source documents, you need to fix the link for each occurrence.

NVivo addresses this problem by providing 'externals' to handle hyperlinks. You create one external to represent the web site or file and link to the external from other documents—this way if a hyperlink becomes invalid you need only update it in one location.

To handle hyperlinks using externals:
1. Create an external to represent the web site or other file.
2. Create a 'See Also' link from the required content to the external.
   a. Click in the 'See Also' link and click the Links menu.
   b. Click the Open Linked External file option.

Adding Hyperlinks

To create a hyperlink in a document, memo or external:
1. Open the required source—its content is displayed in Detail View.
2. Select the text you want to link from.
3. On the Links menu, click Hyperlink.
4. Click New Hyperlink.
   The New Hyperlink dialog box is displayed.
5. Enter the required web site address or click the Browse button to locate a file.
6. Click OK.

A Quick Way To Do This

Right-click:
1. Right-click the required text.
2. Click the Links option.
3. Click Hyperlink.
4. Click the New Hyperlink option.

You can use externals as an efficient way of managing the hyperlinks in your project. Refer to About Hyperlinks for more information.
URLs are automatically hyperlinked in audio/video transcripts and picture logs.

Opening Hyperlinks

To open an existing hyperlink:
1. Open the required source—it’s contents are displayed in Detail View.
2. Select the required hyperlink.
3. On the Links menu, click Hyperlink.
4. Click Open Hyperlink. The linked file is opened in the associated application.

A Quick Way To Do This: Right-click:
1. Right-click in the required hyperlink.
2. Click the Links option.
3. Click Hyperlink.
4. Click the Open Hyperlink option.

Removing Hyperlinks

To remove a hyperlink:
1. Open the required source—it’s contents are displayed in Detail View.
2. Select the hyperlink you want to delete.
3. On the Links menu, click Hyperlink.
4. Click Delete Hyperlink.
5. Click Yes to confirm.

A Quick Way To Do This: Right-click:
1. Right-click in the required hyperlink.
2. Click the Links option.
3. Click Hyperlink.
4. Click the Delete Hyperlink option.

You can delete URLs in transcripts and picture logs as you would any text entry.
Queries and Results

About Queries

NVivo provides different types of queries that 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.

Types of Queries

You can create the following types of queries:

- Text Search
- Coding
- Matrix Coding
- Compound
- Coding Comparison

Query Properties

Properties include all the information required to set-up the query, such as:

- Name (only required if you save the query)
- Search criteria and items included in search
- Directions for how and where the query results should be saved after running it

During query set-up you can choose to save these properties by clicking the Add to Project checkbox. You can then re-run the query as required.

Like other project items, you can organize your queries into folders.

When you run a query, the results are displayed in Detail View.

Query Results

Results include all the project items that match the specified criteria and scope that you defined in the query properties.

NVivo provides a number of ways to handle the results of a query. You can:

- Preview the results without saving them (the default)
- Preview the results and then save them in nodes or sets
- Specify save options during query setup—before running the query

Refer to Handling Query Results for more information.

Saving Results in the Results Folder

You can save query results as a node in the Results folder—a good place to keep result nodes until you decide to add them to your node system. While the node is in the Results folder, you can view the query that generated it. You can move the node into a free node, tree node or case folder but it is no longer linked to the query. You cannot code at nodes in the Results folder.
Editing Query Properties

If you have created and saved a query, you can edit the properties and run it again if required.

To edit query properties:
1. In Navigation View, click the Queries button.
2. In List View, select the required query.
3. On the Project menu, click Query Properties.
   The <Type> Query Properties dialog box is displayed.
4. Move between the tabs to edit the required properties.
   The properties available depend on the type of query you are working with.
5. Click the Apply button to save the changes on a tab without closing the dialog box.
6. To save the properties without running the query, click OK.
7. Click Run to execute the query.

Double-click:
   In List View, double-click the required query.

Right-click:
   1. In List View, right-click the required query.
   2. Click the Query Properties option.

Re-Running Queries

When you set-up and save a query, you can re-run it as your project progresses. You can also open the most recent query (even though you may not have saved it) and run it again.

To re-run a saved query
1. In Navigation View, click the Queries button.
2. In List View, click the required query.
3. On the Project menu, click Run Query.
   The query is executed and the results are displayed in Detail View.

To re-run the last query
1. On the Tools menu, click Query.
2. Click Last Run Query.
   The properties for the most recent query are displayed.
3. If required, edit the criteria.
4. Click the Run button.

You can run the most recent query for this session. If you close NVivo, the last run query is not available when you re-open the application.

Copying Queries

You can copy a query within its own folder (a number is appended to the name) or into other query folders. This can save time when you create a new query with similar criteria to an existing query.

To copy an existing query:
1. In Navigation View, click the Queries button.
2. In List View, click the required query.
3. On the Edit menu, click Copy.
4. Click the destination query folder.
5. On the Edit menu, click Paste.

Copy and Paste toolbar buttons:
1. In List View, click the required query.
2. Click the Copy button:
3. Select the destination folder.
4. Click the Paste button.

Right-click:
1. In List View, right-click the required query.
2. Click the Copy option.
3. Right-click the destination folder.
4. Click the Paste option.

Deleting Queries

To delete a query:
1. In Navigation View, click the Queries button.
2. In List View, click the required query.
3. On the Edit menu, click Delete.
4. Click Yes to confirm.
Handling Query Results

NVivo provides a number of ways to handle the results of a query. You can:

Preview the results without saving them (the default)

If you are not sure you want to save query results, you can 'preview' them in Detail View.

To preview results:
1. Add or open the required query.
2. Click the Query Options tab.
3. From the Option drop-down list, select Preview Only.
4. Click the Run button.

For text search queries, the results include the name of each matching item along with its relevance rating—refer to Text Search Queries for more information.

For coding and matrix coding queries, the results are displayed as a preview node.

Preview the results and then save them in a node or set

1. On the Tools menu, click Query.
2. Click the Store Query Results option.
   The Store Query Results dialog box is displayed.
3. Select the required options:
## Option Description

### Option
From the drop-down list, select how you would like to save the results of the query:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Results as New Node</td>
<td>Creates a new node, codes all occurrences of search text at the node, and saves it in the selected node folder.</td>
</tr>
<tr>
<td>Merge Results into Existing Node</td>
<td>Codes all occurrences of search text at an existing node. Click the Select button and choose the required node.</td>
</tr>
<tr>
<td>Create Results as New Set</td>
<td>Creates a new set that includes all project items matching the search criteria.</td>
</tr>
<tr>
<td>Add Results to Existing Set</td>
<td>Saves the search results in an existing set. Click the Select button and choose the destination set.</td>
</tr>
<tr>
<td>Create Results as New Node Hierarchy</td>
<td>Saves the results as a tree node using the node name as the parent and matching items as the children.</td>
</tr>
</tbody>
</table>

---

**For Text Search Query results:**

If you store the results as a node, you will be able to view each occurrence of the selected keyword in context (KWIC). By default, the context is ‘narrow’, meaning five words on either side. For more information, refer to Viewing the Coding Context.

You can also change the definition of narrow, to show more or less words on each side of the selected word—refer to Setting Application Options (General Tab) for more information.

---

### Location
If you are saving the results as a new node, click the Select button to define the location. For example, to save the results as a new free node, select the Free Nodes folder.

### Name
If you are saving the results as a new node or set, enter a name for the new item.

If you are merging the results into an existing node or set, click the Select button and choose the destination item.

### Description
If required, enter a description for the new node or set.

4. Click OK.
Specify save options during query setup—before running the query

1. Click Add To Project in the query dialog box.
2. Enter the name and description of the query in the General tab.
3. Click the Query Options tab.
4. From the Option drop-down list, select the required option:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Results as New Node</td>
<td>Creates a new node, codes all occurrences of search text at the node, and saves it in the selected node folder.</td>
</tr>
<tr>
<td>Merge Results into Existing Node</td>
<td>Codes all occurrences of search text at an existing node. Click the Select button and choose the required node.</td>
</tr>
<tr>
<td>Create Results as New Set</td>
<td>Creates a new set that includes all project items matching the search criteria.</td>
</tr>
<tr>
<td>Add Results to Existing Set</td>
<td>Saves the search results in an existing set. Click the Select button and choose the destination set.</td>
</tr>
<tr>
<td>Create Results as New Node Hierarchy</td>
<td>Saves the results as a tree node using the node name as the parent and matching items as the children.</td>
</tr>
</tbody>
</table>

For Text Search Query results:
- If you store the results as a node, you will be able to view each occurrence of the selected keyword in context (KWIC). By default, the context is 'narrow', meaning five words on either side. For more information, refer to Viewing the Coding Context.
- You can also change the definition of narrow, to show more or less words on each side of the selected word—refer to Setting Application Options (General Tab) for more information.

Location
- If you are saving the results as a new node, click the Select button to define the location. For example, to save the results as a new free node, select the Free Nodes folder.

Name
- If you are saving the results as a new node or set, enter a name for the new item.
- If you are merging the results into an existing node or set, click the Select button and choose the destination item.
Description If required, enter a description for the new node or set.

5. Click **OK**.
6. Click the **Run** button.

You can also export query results as a spreadsheet or text file—refer to [Exporting Query Results](#) for more information.

### Saving Results in the Results Folder

You can save query results as a node in the **Results** folder—a good place to keep result nodes until you decide to add them to your node system. You can export, print and work with them in the same way as other nodes.

While the node is in the **Results** folder, you can also [view the query that generated it](#)

1. In **Navigation View**, click the **Queries** button.
2. Click the **Results Folder**.
3. Click the required query.
4. On the **Links** menu, click **Open Linked Query**.

You cannot code at nodes while they are in the **Results** folder. You can move the node into a free node, tree node or case folder but it is no longer linked to the query.

### Exporting Query Results

You can export query results to HTML, PDF, Microsoft Word, Microsoft Excel, as a rich text or plain text file. The format available will depend on the type of query you ran and how you chose to store your query results. Refer to [Handling Query Results](#) for more information.

#### Exporting Text Query, Coding Query & Compound Query Results

To export the **text query**, **coding query** and **compound query** results you have stored as nodes:

1. In **Navigation View**, click **Queries**.
2. Click on the **Results** folder.
3. In **List View**, select the query result to export.
4. On the **Project** menu, click **Export Result**.
5. Select the required **options**.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export</td>
<td>You can choose to export:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Entire content</strong>: Exports source content coded at the node as HTML files. If you select this option you can also choose to include annotations and other links.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Reference view</strong>: this exports the text-based node references (as displayed in the Reference tab) as a document (.txt, .doc, .docx, .rtf, or .pdf)</td>
</tr>
<tr>
<td></td>
<td>- <strong>Summary view</strong>: Exports a list of all the sources coded at this node including folder hierarchy and coverage (as displayed in the Summary tab). This can be exported as a spreadsheet (.xls) or as a document (.txt, .doc, .docx, .rtf or .pdf).</td>
</tr>
<tr>
<td>Name</td>
<td>Include the project item name.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
<tr>
<td>Format</td>
<td>If you choose to include the name, you can select the required format.</td>
</tr>
<tr>
<td>Description</td>
<td>Include the description as defined in the node properties.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
<tr>
<td>Annotations</td>
<td>Annotated text is highlighted and numbered. The text of the annotation is displayed under the heading Annotations.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
<tr>
<td>See Also Links</td>
<td>'See also' links are identified by superscript roman numerals (I) and the destination of the link is displayed under the heading See Also Links.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
<tr>
<td>Relationships</td>
<td>The items to which the node is related are displayed under the heading Relationships.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
<tr>
<td>Memo Links</td>
<td>If the node is linked to a memo, the memo is listed under the heading Linked Memo.</td>
</tr>
<tr>
<td></td>
<td>This option is only available when you choose to export the entire content or the reference view.</td>
</tr>
</tbody>
</table>
Paragraph Numbers

This will display the paragraph number beside each paragraph.

This option is only available when exporting the entire content or the reference view.

Open on Export

Select this option, if you want the exported file to open automatically when the export has completed.

6. Click OK.

The Save As dialog box is displayed.

7. In the Save in list, select the destination for the exported file.

8. In the File name field, enter a name for the exported file.

9. In the Save as type field, select the format for the exported file.

10. Click Save.

Exporting Word Frequency Query Results

To export word frequency query results as a summary or tag cloud:

1. Open the query result in Detail View.

2. To export the results in list form, select the Summary tab. Then on the Project menu, click Export List.

   OR

   To export the results as a tag cloud, select the Tag Cloud tab. Then on the Project menu, click Export Tag Cloud.

3. Click Save.

   The Save As dialog box is displayed.

4. In the Save in list, select the destination for the exported file.

5. In the File name field, enter a name for the exported file.

6. In the Save as type field, select the format for the exported file.

7. Click Save.

Exporting Coding Comparison Query Results

To export coding comparison query results:

1. Open the query result in Detail View.

2. On the Project menu, click Export List.

3. Click Save. The Save As dialog box is displayed.

4. In the Save in list, select the destination for the exported file.

5. In the File name field, enter a name for the exported file.

6. In the Save as type field, select the format for the exported file.

7. Click Save.
Exporting Matrix Coding Query Results

To export Matrix Coding Query results:
1. In Navigation View, click Queries.
2. Click on the Results folder.
3. In List View, select the query result to export.
4. On the Project menu, click Export Matrix.
5. Click Save.
   The Save As dialog box is displayed.
6. In the Save in list, select the destination for the exported file.
7. In the File name field, enter a name for the exported file.
8. In the Save as type field, select the format for the exported file.
9. Click Save.

In List View, you can select multiple items to export by holding down either the SHIFT key for a range of items or CTRL key for non-consecutive items, as you click with your mouse. If you selected different types of query results, e.g., a text query result stored as a node and a matrix coding query result stored as a matrix, you can only export them as lists.

Types of Queries

Text Search Queries

A text search query enables you to search for words or phrases in selected sources, nodes, sets and/or annotations.

Text search queries can provide a quick way of coding your sources—you can search for words in a document and code each occurrence at a specific node. For example, you could code each occurrence of fun at the node enjoyment. To code the words or paragraph around the search word, use the Spread Coding option on the Query Options tab.

To create a text search query:
1. In Navigation View, click on Queries.
2. On the Main toolbar, click the New button:
3. Click the **Text Search Query in This Folder** option.
   The **Text Search Query** dialog box is displayed.

4. Enter search text and other criteria in the **Text Search Criteria tab**.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for</td>
<td>Enter the words you want to search for—<em>enjoy fun</em> will find all items that contain <em>enjoy</em> or <em>fun</em>. To find a phrase use double quotes &quot;<em>social interaction</em>&quot;. You can also use <a href="https://www.nvivo.com">special characters and boolean operators</a> to refine the search. The search is not case-sensitive—the combination of upper and lower case letters does not matter.</td>
</tr>
<tr>
<td>Search In</td>
<td>Select whether you want to search in text and/or annotations.</td>
</tr>
<tr>
<td>Of</td>
<td>Select the project items you want to search.</td>
</tr>
<tr>
<td></td>
<td><strong>To search for specific items:</strong></td>
</tr>
<tr>
<td></td>
<td>1. Click <strong>Selected Items</strong> in the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Select Project Items</strong> dialog box is displayed.</td>
</tr>
<tr>
<td></td>
<td>2. On the left, click the required folder. Click the folder check box to include all items in the folder.</td>
</tr>
<tr>
<td></td>
<td>3. On the right, click the check boxes for the required items. To select all nodes under a parent node, click the <strong>Automatically select hierarchy</strong> checkbox. You can use the <strong>Filter</strong> button to limit the display to items that match specific criteria—refer to <a href="https://www.nvivo.com">Finding Project Items by Name</a> for more information. Click the <strong>Select All</strong> button to automatically select items matching the criteria.</td>
</tr>
<tr>
<td></td>
<td>4. Click <strong>OK</strong></td>
</tr>
<tr>
<td></td>
<td><strong>To search for items in selected folder:</strong></td>
</tr>
<tr>
<td></td>
<td>1. Click the <strong>Items in Selected Folders</strong> option.</td>
</tr>
<tr>
<td></td>
<td>2. Click the <strong>Select</strong> button.</td>
</tr>
<tr>
<td></td>
<td>3. Click the check boxes for the required folders.</td>
</tr>
<tr>
<td></td>
<td>4. Click <strong>OK</strong></td>
</tr>
</tbody>
</table>
Where

Search in items that were created or modified by selected users. To select specific users:

1. Click the required option in the drop-down list.
2. The Select Project Items dialog box is displayed.
3. On the right, click the check boxes for the required users.
4. Click OK.

Stemmed Search

Check the box to conduct a 'stemmed' search.

A stemmed search enables you to find words with the same 'stem' as the word entered in the Search for field.

For example, a stemmed search on Connect will find:

- Connect
- Connected
- Connecting
- Connection
- Connections

Stemmed searches do not work for languages other than English and cannot be used in phrased searches (words enclosed in double quotes).

5. If you want to save the query, click the Add to Project checkbox at the top of the dialog.
Enter a name and description in the General tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query type</td>
<td>Displays the type of query you are creating. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter a name for the query.</td>
</tr>
<tr>
<td>Description</td>
<td>If required, enter a description of the query.</td>
</tr>
<tr>
<td>Location</td>
<td>Displays the folder that contains the query. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Created</td>
<td>Displays the date and time the query was created. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Modified</td>
<td>Displays the date and time the query was last modified. You cannot change the contents of this field.</td>
</tr>
</tbody>
</table>
6. Determine how the query results are stored in the Query Options tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option</td>
<td>From the drop-down list, select how you would like to save the results of the query:</td>
</tr>
<tr>
<td>Preview Only</td>
<td>Displays a list of matching project items.</td>
</tr>
<tr>
<td>Create Results as New Node</td>
<td>Creates a new node, codes all occurrences of search text at the node, and saves it in the selected node folder.</td>
</tr>
<tr>
<td>Merge Results into Existing Node</td>
<td>Codes all occurrences of search text at an existing node.</td>
</tr>
<tr>
<td>Create Results as New Set</td>
<td>Creates a new set that includes all project items matching the search criteria.</td>
</tr>
<tr>
<td>Add Results to Existing Set</td>
<td>Saves the search results in an existing set. Click the Select button and choose the destination set.</td>
</tr>
<tr>
<td>Create Results as New Node Hierarchy</td>
<td>Saves the results as a tree using the node name as the parent and matching items as the children.</td>
</tr>
</tbody>
</table>

| Location | If you are saving the results as a new node, click the Select button to define the location. For example, to save the results as a new free node, select the Free Nodes folder. |

| Name | If you are saving the results as a new node or set, enter a name for the new item. |

If you are merging the results into an existing node or set, click the Select button and choose the destination item. Its name is displayed in the Name field. |

| Description | If required, enter a description for the new node or set. |

| Spread to | Refer to Spread Coding to the Context for more information. |

| Open results | Click this checkbox to display the query results in Detail View. This option is only available if results are saved as a node. |
Create results if empty

If the query does not return any results, click this option if you want to create an 'empty' node regardless.

This option is only available if you have chosen to save the results as a new node, set or node hierarchy.

7. To save the query properties without running the query, click **OK**.
8. To run the query, click the **Run** button.

**Right-click:**

1. In **Navigation View**, click the **Queries** folder.
2. Right-click in **List View**.
3. Click the **New Query** option.

**About the Relevance Rating**

When you preview the results of a text search, items are displayed with a **Relevance** percentage—a common ranking technique used by internet search engines. The relevance ranking indicates the 'best match' for the scope and criteria you have defined and is derived from:

- The relevance weighting defined for a word (use the Special Characters button to insert a relevance weighting)
- The number of Items included in the search scope
- The number of finds in the search scope
- The number of finds in a particular scope item
- Criteria in your query

If you store the results as a node, you will be able to view each occurrence of the selected keyword in context (KWIC). By default, the context is 'narrow', meaning five words on either side. Refer to **Handling Query Results** for more information.

**Text Search: Special Characters and Operators**

When conducting a text search you can:

- Use 'wildcards' in place of characters. [More about 'wildcards']

  A wildcard character is a keyboard character such as an asterisk (*) or a question mark (?) that is used to represent one or more characters when you are searching for project items or running a text search query.

  Wildcard characters are often used in place of one or more characters when you do not know what the real character is or you do not want to type the entire name.

  Wildcards cannot be used as the first character of a search.
<table>
<thead>
<tr>
<th>Wildcard</th>
<th>Description</th>
<th>Syntax</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asterisk (*)</td>
<td>Use the asterisk as a substitute for zero or more characters.</td>
<td>*</td>
<td>community OR &quot;social interaction&quot;</td>
</tr>
<tr>
<td></td>
<td>For example: *t will find get, great and gt</td>
<td>*</td>
<td>community OR &quot;social interaction&quot;</td>
</tr>
<tr>
<td>Question mark (?)</td>
<td>Use the question mark as a substitute for a single character.</td>
<td>?</td>
<td>community AND &quot;social interaction&quot;</td>
</tr>
<tr>
<td></td>
<td>For example: ? will find get and gate but not great or grunt</td>
<td>?</td>
<td>community AND &quot;social interaction&quot;</td>
</tr>
</tbody>
</table>

- Combine multiple words or phrases using [boolean operators](#).

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Syntax</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>OR</td>
<td>Searches for items containing either (or both) of two terms.</td>
<td>community OR &quot;social interaction&quot;</td>
<td>community OR &quot;social interaction&quot;</td>
</tr>
<tr>
<td></td>
<td>When you enter multiple words or phrases without an operator, the OR is implied.</td>
<td>community OR &quot;social interaction&quot;</td>
<td>community OR &quot;social interaction&quot;</td>
</tr>
<tr>
<td>AND</td>
<td>Searches for items containing both terms.</td>
<td>community AND &quot;social interaction&quot;</td>
<td>community AND &quot;social interaction&quot;</td>
</tr>
<tr>
<td>NOT (-)</td>
<td>Searches for items containing the first term but not the second term.</td>
<td>community NOT &quot;social interaction&quot;</td>
<td>community NOT &quot;social interaction&quot;</td>
</tr>
<tr>
<td></td>
<td>Cannot be used with a single term.</td>
<td>community NOT &quot;social interaction&quot;</td>
<td>community NOT &quot;social interaction&quot;</td>
</tr>
</tbody>
</table>

[boolean operators](#)
• Find words with similar or identical spelling using a fuzzy search.
  Enter a tilde (~) character after a word to find words of similar or identical spelling. This is a useful way of finding spelling mistakes.
  For example, searching for roam ~ will find words such as 'roams' and 'foam' and 'room'.

• Specify proximity using 'near' search characters. Example
  Finds words that are within a specified word distance from each other—the tilde (~) specifies proximity.
  For example:
  "happy busy"~10
  Searches for the existence of the words happy and busy within 10 words of each other.

• Specify relevance weightings for words and phrases.
  Provides results based on the relevance weighting given to a word or phrase. Weightings must be greater than zero, but can be less than one (e.g. 0.2). Default weighting is one.
  For example:
  happy^4 busy
  In the text search results, finds of the word "happy" will have relevance ranking four times higher than finds of "busy".

Some meta characters and stop words are reserved for special use in searches and you cannot search for them explicitly. List of metacharacters and stop words

<table>
<thead>
<tr>
<th>Character</th>
<th>Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>Plus</td>
<td>Indicate words or phrases that must be included</td>
</tr>
<tr>
<td>-</td>
<td>Hyphen</td>
<td>Can be used in place of NOT</td>
</tr>
<tr>
<td>&amp;</td>
<td>Ampersand</td>
<td>Can be used in place of AND</td>
</tr>
<tr>
<td></td>
<td>Pipe</td>
<td>Can be used in place of OR</td>
</tr>
<tr>
<td>Symbol</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>!</td>
<td>Exclamation mark</td>
<td>Can be used in place of NOT</td>
</tr>
<tr>
<td>()</td>
<td>Round brackets</td>
<td>Groups clauses to form sub queries</td>
</tr>
<tr>
<td>{}</td>
<td>Curly brackets</td>
<td>Signify exclusive range queries</td>
</tr>
<tr>
<td>[]</td>
<td>Square brackets</td>
<td>Signify inclusive range queries</td>
</tr>
<tr>
<td>^</td>
<td>Caret</td>
<td>Symbol with a boost factor (a number) to indicate level of proximity</td>
</tr>
<tr>
<td>&quot; &quot;</td>
<td>Double quotes</td>
<td>Enclose a group of words to enable search for a phrase</td>
</tr>
<tr>
<td>~</td>
<td>Tilde</td>
<td>Indicate proximity</td>
</tr>
<tr>
<td>*</td>
<td>Asterisk</td>
<td>Multiple character wildcard to include any number of characters</td>
</tr>
<tr>
<td>?</td>
<td>Question mark</td>
<td>Single character wildcard to include only one character</td>
</tr>
<tr>
<td>:</td>
<td>Colon</td>
<td>Indicate a field</td>
</tr>
<tr>
<td>\</td>
<td>Backslash</td>
<td>Use before a special character to include it in the search</td>
</tr>
</tbody>
</table>
Stop Words (if your selected 'Text search index' language is English)
"a", "and", "are", "as", "at", "be", "but", "by", "for", "if", "in", "into", "is", "it", "no", "not", "of", "on", "or", 
"s", "such", "that", "the", "their", "then", "there", "these", "they", "this", "to", "was", "will", "with"

Simple Coding Queries

Coding queries enable you to find content based on its coding. A simple coding query lets you see 
content coded at a node limited by a specific scope—for example, you could find all content coded by 
Motivation in the Documents folder. Use the Advanced tab to combine criteria and use Boolean 
operators—for example, find all content coded by Community AND Social Interaction.

To create a simple coding query:
1. In Navigation View, click the Queries button.
2. On the Main toolbar, click the New button:

3. Click the Coding Query in This Folder option.

   The Coding Query dialog box is displayed.

4. If you want to save the query, click the Add to Project checkbox at the top of the dialog box. 
Enter a name and description in the General tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query type</td>
<td>Displays the type of query you are creating. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter a name for the query.</td>
</tr>
<tr>
<td>Description</td>
<td>If required, enter a description of the query.</td>
</tr>
<tr>
<td>Location</td>
<td>Displays the folder that contains the query. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Created</td>
<td>Displays the date and time the query was created. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Modified</td>
<td>Displays the date and time the query was last modified. You cannot change the contents of this field.</td>
</tr>
</tbody>
</table>

5. Click the Coding Criteria tab.
6. Define search criteria in the **Simple tab**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Node</td>
<td>Click this option to find content coded by a selected node. For example, find all content coded at the node <em>community</em>.</td>
</tr>
<tr>
<td>Any case where</td>
<td>Click the <strong>Any case where</strong> option to find content coded at cases with a specified attribute value—for example, find all content coded at cases where <em>gender = male</em>. If the project does not contain cases, this option is unavailable.</td>
</tr>
<tr>
<td>By Any User</td>
<td>If you want to find content coded by a specific user, select an option from the drop-down list. For example, find content coded at <em>community</em> by a selected team member.</td>
</tr>
<tr>
<td>In</td>
<td>Select the items to include in the query. For example, you could search in all sources or in selected nodes.</td>
</tr>
<tr>
<td>Where</td>
<td>Select items based on the user who created or modified them. For example, search in all sources that were created by <em>Mary</em>.</td>
</tr>
</tbody>
</table>
7. Determine how the query results are stored in the **Query Options** tab

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
<td>From the drop-down list, select how you would like to save the results of the query:</td>
</tr>
<tr>
<td>Preview Only</td>
<td>Display matching content in a preview node.</td>
</tr>
<tr>
<td>Create Results as New Node</td>
<td>Creates a new node, codes all matching contents at the node, and saves it in the selected node folder.</td>
</tr>
<tr>
<td>Merge Results into Existing Node</td>
<td>Codes all matching content at an existing node. Click the <strong>Select</strong> button and choose the required node.</td>
</tr>
<tr>
<td>Create Results as New Set</td>
<td>Creates a new set that includes all project items matching the search criteria.</td>
</tr>
<tr>
<td>Add Results to Existing Set</td>
<td>Saves the matching items in an existing set. Click the <strong>Select</strong> button and choose the destination set.</td>
</tr>
<tr>
<td>Create Results as New Node Hierarchy</td>
<td>Saves the results as a tree using the node name as the parent and matching items as the children.</td>
</tr>
</tbody>
</table>

**Location**

If you are saving the results as a new node, click the **Select** button to define the location. For example, to save the results as a new free node, select the **Free Nodes** folder.

**Name**

If you are saving the results as a new node or set, enter a name for the new item.

If you are merging the results into an existing node or set, click the **Select** button and choose the destination item.

**Description**

If required, enter a description for the new node or set.

**Spread to**

Refer to **Spread Coding to the Context** for more information.

**Open results**

Click this checkbox to display the query results in **Detail View**.

This option is only available if you have chosen to save the results as a new node, set or node hierarchy.
Create results if empty

If the query does not return any results, click this option if you want to create an 'empty' node.

This option is only available if you have chosen to save the results as a new node, set or node hierarchy.

8. If you have selected the Add to Project checkbox, click OK to save the query set-up.
9. Click the Run button.

A Quick Way To Do This

Right-click:
1. In Navigation View, click the Queries folder.
2. Right-click in List View.
3. Click the New Query option.

Advanced Coding Queries

You can use advanced coding queries to search for source content that has been coded at multiple nodes—and you can use operators to further refine the search. For example, you could explore the hunch that 'men enjoy being active members of the community'

You could create the following coding query:

Content coded by any case where Gender = male
AND Coded by all of these nodes: {enjoyment, community}

To build an advanced coding query:
1. Create a coding query. Refer to Simple Coding Queries for more information.
2. Click the Coding Criteria tab.
3. Click the Advanced tab.
4. In the Define more criteria panel, choose whether you want to search for content coded at (or NOT coded by)
   - All Selected Nodes (this node AND this node)
   - Any Selected Node (this node OR this node)
**Any Case Where** an attribute is equal to a selected value

5. Click the **Select** button and choose the required nodes or attribute value.

6. From the **By Any User** drop-down list, you can select to include coding done by any user or choose only the coding done by specific users.

7. Click the **Add to List** button.
   The criteria is added to the **Search for content matching these criteria** list.

8. To build on this criteria:
   a. Click the **AND** drop-down list and select the required **operator**.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>![Diagram for AND]</td>
</tr>
</tbody>
</table>

   | OR       | ![Diagram for OR] |

   | NEAR Content | Where coding at the selected node is near coding at another node in the criteria list. |
   | PRECEDING Content | Where coding at a node comes before the coding at another node in the criteria list. |
   | SURROUNDING Content | Where coding at a node (already added to the list) surrounds coding at another node. |
If you choose the NEAR or PRECEDING Content operators, the Coding Search Operator dialog box is displayed and you can specify the options for proximity and retrieval.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proximity</td>
<td>To define what you mean by Near or Preceding, select an option from the drop-down list:</td>
</tr>
<tr>
<td></td>
<td><strong>Overlapping</strong>: displays content that has been coded at both nodes.</td>
</tr>
<tr>
<td></td>
<td><strong>In Custom Context</strong>: displays content that is within a specified context, Click the Specify button and define the required context for text, audio/video and pictures. For example, for documents you might define Near as within 5 words while for audio/video it is within a 5 second timespan.</td>
</tr>
<tr>
<td></td>
<td>From the Find Matches drop-down list you can also choose the In Broad Context or In Narrow Context options. When you choose either of these options, the values default to those defined in Application Options. You can update the values for this specific query.</td>
</tr>
<tr>
<td></td>
<td><strong>In Same Scope Item</strong>: displays the content that has been coded within the same source or node. For example, community is considered near motivation when they are found in the same source.</td>
</tr>
<tr>
<td></td>
<td><strong>In Same Coding Reference</strong>: displays the content within the same occurrence of coding. For example, community is considered near motivation when they are both coded at helping people.</td>
</tr>
<tr>
<td></td>
<td><strong>Finds for first search item</strong>: Displays content matching the criteria defined for first search item</td>
</tr>
<tr>
<td></td>
<td><strong>Finds for second search item</strong>: Displays content matching the criteria of second search item</td>
</tr>
<tr>
<td></td>
<td><strong>Content between finds</strong>: Displays content between first and second search items. This option is only available if both of the above check boxes are selected and Overlapping is not the chosen Proximity option.</td>
</tr>
<tr>
<td></td>
<td><strong>Compare proximity between text and non-text items</strong>: Determines how proximity is evaluated in video, audio and picture sources. By default, the matching content must be contained in the same component of a source.</td>
</tr>
</tbody>
</table>
For example, coding in text is matched only with coding in other transcript text and not with video. Thus, video coding would not be matched with transcript coding for the same timespan and vice-versa.

If you click this option, matching content can be in either the media or the transcript, the picture or the log.

c. Select Coded by (you can also choose Not Coded by) from the drop down list.
d. Select the required nodes or attribute value.
e. Click the Add to List button.
f. If required, use the arrow buttons to force the 'order of processing'. Select an item from the criteria list and click the required arrow button. Example

For example, in this query:

Content (coded by enjoyment
OR coded by fun)
AND Coded by community

The OR nodes are surrounded by parentheses so that NVivo processes them as a unit—being at the top of the list means they are processed first.

9. To add or edit items in the Search for content matching these criteria list:
   a. Select the item you want to edit.
   b. Click the Remove button.
      The item is removed from the list and is available for edit in the Define more criteria panel.
   c. Edit the required criteria, for example, change AND to OR.
   d. Click the Add to List button to return the edited item to the criteria list.

10. From the In drop-down list, select the items you want to include in the query. For example, search all sources or selected nodes.

11. From the Where drop-down list, you can specify to search project items created and/or modified by any or selected users.
12. Determine how the query results are stored in the **Query Options** tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
<td>From the drop-down list, select how you would like to save the results of the query:</td>
</tr>
<tr>
<td>Preview Only</td>
<td>Displays matching content in a preview node.</td>
</tr>
<tr>
<td>Create Results as New Node</td>
<td>Creates a new node, codes all matching contents at the node, and saves it in the selected node folder.</td>
</tr>
<tr>
<td>Merge Results into Existing Node</td>
<td>Codes all matching content at an existing node. Click the <strong>Select</strong> button and choose the required node.</td>
</tr>
<tr>
<td>Create Results as New Set</td>
<td>Creates a new set that includes all project items matching the search criteria.</td>
</tr>
<tr>
<td>Add Results to Existing Set</td>
<td>Saves the matching items in an existing set. Click the <strong>Select</strong> button and choose the destination set.</td>
</tr>
<tr>
<td>Create Results as New Node Hierarchy</td>
<td>Saves the results as a tree using the node name as the parent and matching items as the children.</td>
</tr>
</tbody>
</table>

| Location | If you are saving the results as a new node, click the **Select** button to define the location. For example, to save the results as a new free node, select the **Free Nodes** folder. |

| Name | If you are saving the results as a new node or set, enter a name for the new item. If you are merging the results into an existing node or set, click the **Select** button and choose the destination item. |

| Description | If required, enter a description for the new node or set. |

| Spread to | Refer to **Spread Coding to the Context** for more information. |

| Open results | Click this checkbox to display the query results in **Detail View**. |
Create results if empty  
If the query does not return any results, click this option if you want to create an 'empty' node.
This option is only available if you have chosen to save the results as a new node, set or node hierarchy.

13. If you have selected the Add to Project checkbox, click OK to save the query set-up.
14. Click the Run button.

Matrix Coding Queries

Matrix coding queries enable you to compare pairs of items and display the results in a table or matrix.
A new node is created for each cell in the matrix—you can open the node and explore all the material gathered there. Example

Compare male and female attitudes about time:

<table>
<thead>
<tr>
<th>Time by Gender</th>
<th>A: gender = male</th>
<th>B: gender = female</th>
</tr>
</thead>
<tbody>
<tr>
<td>1: 'spare' time</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>2: time as money</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>3: too little time</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>4: giving time</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>5: taking time</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

In this example,
- Nodes relating to time were selected for rows and the case attribute values male and female were selected for columns.
- Cells display the number of coding references—there are 2 occurrences of coding at 'spare' time and male. Using the right-mouse button on the matrix, you can toggle to change the information displayed in cells, (number of sources is the default).
- To see everything males said about 'spare' time, double-click on the cell.

To define the criteria for a matrix coding query:
1. In Navigation View, click the Queries button.
2. On the Main toolbar, click the New button:
3. Click the Matrix Coding Query in This Folder option.
The Matrix Coding Query dialog box is displayed.
4. From the Define More Rows drop-down list, click the type of item you want to display in rows.
5. Click the Select button and choose the required items.
6. Click the **Add to List** button.
7. Click the **Columns** tab.
8. From the **Define More Columns** drop-down list, click the type of item you want to display in columns.
9. Click the **Select** button and choose the required items.
10. Click the **Add to List** button.
11. If you want to determine how content is retrieved for the rows and columns, click the **Matrix** tab and select a boolean operator.

You can choose the following operators for the pairs in a matrix coding query:

<table>
<thead>
<tr>
<th>Operator</th>
<th>Illustration</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>Find items coded at row and column</td>
</tr>
<tr>
<td>OR</td>
<td>Find items coded at row or column</td>
</tr>
<tr>
<td>NOT</td>
<td>Find items coded at row but not at column</td>
</tr>
</tbody>
</table>

12. From the **Name Display** drop-down list, select the way you want project item names to be displayed in the row and column headers.
13. From the **In** drop-down list select the items you want to include in the scope of the search.
14. Click the **Run** button.

The matrix is displayed in **Detail View**. In this view you can:

- Right-click on the matrix to access options for adjusting the display.
Word Frequency Queries

Word frequency queries enable you to list the most frequently occurring words in selected sources, nodes, sets and/or annotations. This can be a useful way of identifying themes or concepts—see example

Click the column headings to change the sort order

<table>
<thead>
<tr>
<th>Word</th>
<th>Length</th>
<th>Count</th>
<th>Percentage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>goods</td>
<td>5</td>
<td>32</td>
<td>0.37</td>
</tr>
<tr>
<td>well</td>
<td>4</td>
<td>32</td>
<td>0.37</td>
</tr>
<tr>
<td>family</td>
<td>6</td>
<td>31</td>
<td>0.36</td>
</tr>
<tr>
<td>most</td>
<td>4</td>
<td>31</td>
<td>0.36</td>
</tr>
<tr>
<td>something</td>
<td>9</td>
<td>31</td>
<td>0.36</td>
</tr>
<tr>
<td>week</td>
<td>4</td>
<td>31</td>
<td>0.36</td>
</tr>
<tr>
<td>hit</td>
<td>3</td>
<td>30</td>
<td>0.35</td>
</tr>
<tr>
<td>out</td>
<td>3</td>
<td>30</td>
<td>0.35</td>
</tr>
<tr>
<td>up</td>
<td>2</td>
<td>30</td>
<td>0.35</td>
</tr>
<tr>
<td>working</td>
<td>7</td>
<td>30</td>
<td>0.35</td>
</tr>
</tbody>
</table>

To define the criteria for a word frequency query:
1. In Navigation View, click on Queries.
2. On the Main toolbar, click the New button:
3. Click the Word Frequency Query in this folder option. The Word Frequency Query dialog box is displayed.
4. From the Search in drop-down list, select whether you want to search in text and/or annotations.
5. From the Of drop-down list, select the items you want to include in the search.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Sources</td>
<td>Include all sources in the word frequency query.</td>
</tr>
<tr>
<td>Selected Items</td>
<td>Include selected items in the word frequency query:</td>
</tr>
<tr>
<td></td>
<td>1. Click the Select button.</td>
</tr>
<tr>
<td></td>
<td>The Select Project Items dialog box is displayed.</td>
</tr>
<tr>
<td></td>
<td>2. On the left, click the required folder. Click the folder check box to include all items in the folder.</td>
</tr>
<tr>
<td></td>
<td>3. On the right, click the check boxes for the required items. To select all nodes under a parent node, click the Automatically select hierarchy checkbox.</td>
</tr>
<tr>
<td></td>
<td>4. You can use the Filter button to limit the display to items that match specific criteria.</td>
</tr>
<tr>
<td></td>
<td>5. Click OK.</td>
</tr>
<tr>
<td>Items in Selected Folders</td>
<td>Include all the items in selected folders:</td>
</tr>
<tr>
<td></td>
<td>6. Click the Select button.</td>
</tr>
<tr>
<td></td>
<td>7. Click the check boxes for the required folders.</td>
</tr>
<tr>
<td></td>
<td>8. Click OK.</td>
</tr>
<tr>
<td>Where</td>
<td>From the Where drop-down list, you can choose to search items created/modified by any or selected users.</td>
</tr>
<tr>
<td>Display Words</td>
<td>Choose how many words you want to display. In the Display Words panel, select All to display a count for all words in the selected items.</td>
</tr>
<tr>
<td></td>
<td>OR</td>
</tr>
<tr>
<td></td>
<td>Select the &lt;number&gt; most frequent words—for example, you could display the 100 most frequently occurring words.</td>
</tr>
<tr>
<td>With minimum length</td>
<td>If you want to exclude short words from the results, enter a number in the With minimum length field. For example, if you set the minimum length to ‘3’, then one and two-letter words are not shown in the results. By default, this field is set to ‘1’, so that all words are displayed.</td>
</tr>
<tr>
<td>Location</td>
<td>If you want to save the query, click the Add to Project check box at the top of the dialog. Enter a name and description in the General tab.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query type</td>
<td>Displays the type of query you are creating. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter a name for the query.</td>
</tr>
<tr>
<td>Description</td>
<td>If required, enter a description of the query.</td>
</tr>
<tr>
<td>Location</td>
<td>Displays the folder that contains the query. You cannot change the contents of this field.</td>
</tr>
</tbody>
</table>
10. To run the query, click the Run button.

After running a query, you can:

**Preview all the references for a selected word**

When you run a word frequency query, a preview node is created for each word—this enables you to see all references to the word.

To open a preview node:

1. Create and run a word frequency query.
2. The results are displayed in **Detail View**.
3. Double-click the required word.

A preview node for the selected word is opened in **Detail View**.

In the preview, you see each occurrence of the selected keyword in context (KWIC). By default, the context is 'narrow', meaning five words on either side. You can expand the context—for more information, refer to **Viewing the Coding Context**.

You can also change the definition of narrow, to show more or less words on each side of the selected word—refer to **Setting Application Options (General Tab)** for more information.

**Save the references for a selected word as a node**

To save a preview node as a node in your node system:

1. Create and run a word frequency query.
   The results are displayed in **Detail View**.
2. Click the required word.
3. On the Project menu, click **Create As**.
4. Click **Create As Node**.
5. Define the location and name the node.

If you open the node in your current NVivo session, you see each occurrence of the coded keyword in context (KWIC). By default, the context is 'narrow', meaning five words on either side. If you open the node in a new NVivo session, only the coded keyword in each occurrence is shown. In both cases, you can expand the context—for more information, refer to **Viewing the Coding Context**.

You can change the definition of narrow context, so that you see more or less words on either side of the coded keyword—refer to **Setting Application Options (General Tab)** for more information.
About the Results

The results are displayed as a summary or tag cloud.

The **Summary** tab lists the words from the most to the least frequent, returning the following information about each word:

- **Length**—the number of letters or characters in the word.
- **Count**—the number of times that the word has appeared within the project items searched.
- **Percentage**—the frequency of the word relative to the total words counted.

The **Tag Cloud** tab displays up to 100 words alphabetically in varying font sizes, where frequently occurring words are in larger fonts.

When determining the frequency of words, **NVivo** applies the following rules:

- Words containing punctuation (such as hyphens, periods and other symbols) are divided into separate words. For example, *part-time* will be counted as *part* and *time*.
- Words containing apostrophes (such as *can't* and *I'd*) are treated as one word but if the apostrophe is followed by an 's then the s is not included (*Tom's* would be counted as *Tom*).
- In audio and video transcripts, only words in the **Content** field are counted—any words in custom transcript fields are not counted.
- Stop words are not counted and are not included in the results. Stop words are language-specific; here are the English stop words:

  "a", "and", "are", "as", "at", "be", "but", "by", "for", "if", "in", "into", "is", "it", "no", "not", "of", "on", "or", "s", "such", "that", "the", "their", "then", "there", "these", "they", "this", "to", "was", "will", "with"

If your sources are in a non-English language, you can change the text search index language, so that **NVivo** uses a different list of stop words. Refer to the **General** tab in **Setting Project Properties** for more information.

If you want to include stop words in the word frequency query, set the text search index language to 'None'. For more information, refer to the **General** tab in **Setting Project Properties**.

- When searching text in selected nodes, if a word is coded against multiple nodes, it is counted once for each node. Similarly, if a word has been coded by multiple users to the same node, it is counted once for each user.

**Compound Queries**

To combine a text search and coding query you can create a **Compound Query**. This query enables you to search for specified text in or near coded content.

To define the criteria for a compound query:

1. On the **Main** toolbar, click the **New** button:

2. Click the **Compound Query in This Folder** option.

   The **Compound Coding Query** dialog box is displayed.

3. To define the first part of the query, select the query type from the **Subquery 1** drop-down list.

4. Click the **Criteria** button and enter the required options. The available criteria depends on the type of query you have selected.
Refer to Text Search Queries, Simple Coding Queries and Advanced Coding Queries for information about defining the relevant criteria.

5. Click OK.

6. From the NEAR Content drop-down list, select the required operator. For example, you could find the text community where it is near content coded at civic responsibility. If required, click the Options button to select the criteria for proximity and retrieval.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td></td>
</tr>
<tr>
<td>AND NOT</td>
<td>Where coding at the selected node is not present at another node in the criteria list.</td>
</tr>
<tr>
<td>NEAR Content</td>
<td>Where coding at the selected node is near coding at another node in the criteria list.</td>
</tr>
<tr>
<td>PRECEDING Content</td>
<td>Where coding at a node comes before the coding at another node in the criteria list.</td>
</tr>
<tr>
<td>SURROUNDING Content</td>
<td>Where coding at a node (already added to the list) surrounds coding at another node.</td>
</tr>
</tbody>
</table>

For example, you could find the text community where it is near content coded at civic responsibility. If required, click the Options button to select the criteria for proximity and retrieval.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Proximity  | To define what you mean by Near or Preceding, select an option from the drop-down list:  
  Overlapping: displays content that has been coded at both nodes.  
  In Custom Context: displays content that is within a specified context. Click the Specify button and define the required context for text, audio/video and pictures. For example, for |
documents you might define Near as within 5 words while for audio/video it is within a 5 second timespan.

From the Find Matches drop-down list you can also choose the In Broad Context or In Narrow Context options. When you choose either of these options, the values default to those defined in Application Options. You can update the values for this specific query.

**In Same Scope Item:** displays the content that has been coded within the same source or node. For example, community is considered near motivation when they are found in the same source.

**In Same Coding Reference:** displays the content within the same occurrence of coding. For example, community is considered near motivation when they are both coded at helping people.

<table>
<thead>
<tr>
<th>Find for first search item</th>
<th>Displays content matching the criteria defined for first search item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find for second search item</td>
<td>Displays content matching the criteria of second search item</td>
</tr>
<tr>
<td>Content between finds</td>
<td>Displays content between first and second search items. This option is only available if both of the above check boxes are selected and Overlapping is not the chosen Proximity option.</td>
</tr>
<tr>
<td>Compare proximity between text and non-text items</td>
<td>Determines how proximity is evaluated in video, audio and picture sources. By default, the matching content must be contained in the same component of a source. For example, coding in text is matched only with coding in other transcript text and not with video. Thus, video coding would not be matched with transcript coding for the same timespan and vice-versa. If you click this option, matching content can be in either the media or the transcript, the picture or the log.</td>
</tr>
</tbody>
</table>

7. To define the second part of the query, select the query type from the Subquery 2 drop-down list.
8. Click the Criteria button and define the required options.
9. From the In drop-down list, select the items you want to include in the search.
10. Determine how the query results are stored in the **Query Options** tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
<td>From the drop-down list, select how you would like to save the results of the query:</td>
</tr>
<tr>
<td>Preview Only</td>
<td>Displays matching content in a preview node.</td>
</tr>
<tr>
<td>Create Results as New Node</td>
<td>Creates a new node, codes all matching contents at the node, and saves it in the selected node folder.</td>
</tr>
<tr>
<td>Merge Results into Existing Node</td>
<td>Codes all matching content at an existing node. Click the Select button and choose the required node.</td>
</tr>
<tr>
<td>Create Results as New Set</td>
<td>Creates a new set that includes all project items matching the search criteria.</td>
</tr>
<tr>
<td>Add Results to Existing Set</td>
<td>Saves the matching items in an existing set. Click the Select button and choose the destination set.</td>
</tr>
<tr>
<td>Create Results as New Node Hierarchy</td>
<td>Saves the results as a tree using the node name as the parent and matching items as the children.</td>
</tr>
</tbody>
</table>

| Location                      | If you are saving the results as a new node, click the Select button to define the location. For example, to save the results as a new free node, select the Free Nodes folder. |

| Name                          | If you are saving the results as a new node or set, enter a name for the new item. If you are merging the results into an existing node or set, click the Select button and choose the destination item. |

| Description                   | If required, enter a description for the new node or set.                                                                                      |

| Spread to                     | Refer to **Spread Coding to the Context** for more information.                                                                               |

| Open results                  | Click this checkbox to display query results in **Detail View**.                                                                                |

| Create results if empty       | If the query does not return any results, click this option if you want to create an 'empty' node.  
This option is only available if you have chosen to save the results as a new node, set or node hierarchy. |
Coding Comparison Queries

A coding comparison query enables you to compare coding done by 2 users or 2 groups of users.

It provides two ways of measuring inter-rater reliability or the degree of agreement between the users: through the calculation of the percentage agreement and Kappa coefficient.

Percentage agreement is the number of units of agreement divided by the total units of measure within the data item, displayed as a percentage.

Kappa coefficient is a statistical measure which takes into account the amount of agreement that could be expected to occur through chance. For more information, connect to the internet and check out this Wikipedia article on Cohen’s kappa.

To Create a Coding Comparison Query:

1. In Navigation View, click on Queries.
2. On the Main toolbar, click the New button:

3. Click the Coding Comparison Query in This Folder option. The Coding Comparison Query dialog box is displayed.

4. In the field Compare coding between, click Select to choose users to include in user groups A and B.

5. In the At field, choose the nodes to compare. Click Select to choose specific nodes.

6. In the Scope field, choose the sources to query. Click Select to choose specific sources.

7. By default, the Display Kappa coefficient and Display percentage agreement boxes are selected for display. You can choose not to display these options by clearing the required box.

8. If you want to save the query, click the Add to Project checkbox at the top of the dialog. Enter a name and description in the General tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query type</td>
<td>Displays the type of query you are creating. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter a name for the query.</td>
</tr>
<tr>
<td>Description</td>
<td>If required, enter a description of the query.</td>
</tr>
<tr>
<td>Location</td>
<td>Displays the folder that contains the query. You cannot change the contents of this field.</td>
</tr>
<tr>
<td>Created</td>
<td>Displays the date and time the query was created. You cannot change the contents of this field.</td>
</tr>
</tbody>
</table>
Modified Displays the date and time the query was last modified. You cannot change the contents of this field.

9. To save the query properties without running the query, click OK.
10. To run the query, click the Run button.

Right-click:
1. In Navigation View, click the Queries folder.
2. Right-click in List View.
3. Click the New Query option.

About the Results

The results include a Source Length column which provides the measure of different sources in the following ways:
- Documents, Memos and Externals = number of characters
- Media file = duration in minutes/seconds/10ths of a second
- Picture = the total number of pixels expressed as height multiplied by width

If you have opted to display the Kappa coefficient and the percentage agreement, the results will show a column on Kappa value and several columns showing the percentage of agreement and non-agreement between the User group A and User group B.

If the users are in complete agreement then the Kappa value or $\kappa = 1$. If there is no agreement among the raters (other than what would be expected by chance) then the Kappa value or $\kappa \leq 0$.

The percentage agreement columns indicate the following values:
- **Agreement Column** = sum of columns A and B and Not A and Not B
- **A and B** = the percentage of data item content coded to the selected node by both Project User Group A and Project User Group B
- **Not A and Not B** = the percentage of data item content coded by neither Project User Group A and Project User Group B
- **Disagreement Column** = sums of columns A and Not B and B and Not A
- **A and Not B** = the percentage of data item content coded by Project User Group A and not coded by Project User Group B
- **B and Not A** = the percentage of data item content coded by Project User Group B and not coded by Project User Group A

You will be able to print out or export the results of the coding comparison query but you will not be able to save the results within the project.

To view the content that has been coded, right-click on a selected row. You can select to Open Node or Open Source to review the coding in detail.
Models

About 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.

Models are made up of shapes and connectors that may or may not be linked to existing project items. [Examples](#)

Unlinked Shapes

These shapes are not 'live' to the data (useful for early sketches). If required, you can convert these to represent 'real' project items.

Linked shapes

These shapes and connectors represent 'real' project items—the icons indicate that they are 'live' to the data:

When a shape or connector is linked to an existing project item, you can easily open the item and explore it in [Detail View](#).

If you delete a project item that is linked to a shape, the shape remains in the model but is displayed with a red cross and you can no longer open the linked item.

Dynamic and Static Models

By default, the models you create in **NVivo** are 'dynamic'. This means you can make shapes 'live' to the data by linking them to existing project items—and you can open the project item directly from the shape.

After creating a model, you may want to keep a 'snapshot' of it at a particular point in your project. This snapshot is called a 'static' model. You cannot edit static models and they are no longer linked to the live data in your project—so if you change a name of a node, for example, it will not be updated in the static model.
What Can You Do in a Model?

When working with a model you can:

- Copy/paste, drag and drop or use the **Model** menu to add project item shapes to the model—including sets or query results.
- Add a project item along with its associated items.
- See how project items in a model are linked.
- Group items and show or hide the groups as required. This allows you to show stages or different views on the same model.
- Zoom out to see more of a model at a reduced size.

Arranging Shapes and Connectors

You can drag shapes and connectors to move them to the required position in a model. **NVivo** also provides a number of automatic layout options that can be a useful starting point for laying out your model—experiment with the options to find one that suits you. You can find these options by clicking the **Model** menu and selecting **Layout**. [View layout options](#)

<table>
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<tbody>
<tr>
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<td>Arrange items in a circular layout:</td>
</tr>
</tbody>
</table>

![Diagram](image)
Directed Arrange items in force-directed layout—this is the calculated 'best fit' for the physical space (all edges are of more or less equal length and there are as few crossing edges as possible). This layout is often used for three dimensional models.
Hierarchical

Arrange items in a hierarchy:

Orthogonal

Arrange items in a right-angled layout:
Adding Models

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 option.
   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.

Right-click:

1. Right-click in the model List View.
2. Click the Add Model option.

Editing Model Properties

To edit the properties of a model:

1. In Navigation View, click the Models button.
2. In List View select the required model.
3. On the Project menu, click Model Properties.
4. Edit the name and description as required.
5. Click OK.

Right Click:

1. Right-click the required model in List View.
2. Click the Model Properties option.
Adding Project Items to Models

To represent existing project items in a model:

1. Open the required model —its content is displayed in Detail View.
2. Click the Model menu.
3. Click Add Project Items. The Select Project Items dialog box is displayed.
4. On the left, click the folder that contains the required project item. Click the folder check box to select all items in a folder.
5. On the right, click the check boxes for the required project items. To select all tree nodes or cases under a parent node, click the Automatically select hierarchy checkbox.
6. Click OK.
7. The Add Associated Data dialog box is displayed. You can choose to add related items as shapes in the model. For example, you could add the memos linked to the selected sources. The options on this dialog change depending on the type of item you are adding to the model.
8. Click the check boxes for the items you want to include.
9. Click OK.

Drag and Drop:

1. In Navigation View, open the required project item folder.
2. In List View, select the required project items.
3. Drag the items into the model

Copy and Paste:

1. In Navigation View, open the required project item folder.
2. In List View, click the required project items.
3. On the Edit menu click Copy.
4. Click in the model.
5. On the Edit menu, click Paste.

Opening Project Items from Models

To open a project item from a model shape:

1. Click the shape for the required project item.
2. On the Model menu, click Open Project Item. This option is unavailable for shapes that are not 'live' to the data. The item is opened in Detail View. Use the tabs at the top of Detail View to move between the model and the project item.

Right-click:

1. Right-click on the required item.
2. Click the Open Project Item option.
Deleting Project Items from Models

To delete a project item from within a model:
1. Click the shape that represents the required project item.
2. On the Model menu, click Delete From Project.
3. Click Yes to confirm. This deletes the item from your project and removes the shape in the model.

If you delete the item outside of the model, example from the Sources folder—the shape remains in the model but is displayed with a red cross and you can no longer open the linked item.

Adding Associated Data to Items

When working with a model in Detail View, you can select one or more project items and add the associated project items. For example, you could add the memos linked to the selected sources.

1. Select one or more linked shapes.
2. On the Model menu, click the Add Associated Data option. The Add Associated Data dialog box is displayed.
3. Click the Associated data from project option.
4. Click the check boxes for the required associated items.
5. Click OK. The associated project items are displayed as shapes in the model.

 Adding Associations Between Items

When working with a model in Detail View, you can select one or more project items and show the associations with other items in the model:
1. Select one or more linked shapes.
2. On the Model menu, click the Add Associated Data option. The Add Associated Data dialog box is displayed.
3. Click the Associations to items in model option.
4. Click the check boxes for the required associated items.
5. Click OK.
Grouping Items in a Model

You can create custom groups for the shapes and connectors in a model. For example, you can create groups representing rival theories or the evolution of a hypothesis—you can then show or hide the groups as required.

A shape or connector can belong in multiple groups.

Creating Custom Groups

To create your own groups for shapes and connectors:

2. Click New Group.
   The Model Group Properties dialog box is displayed.
3. Enter a name for the group in the Name field.
4. If required, enter description of the model in the Description field.
5. Click OK.
   The group is created and displayed in the Custom Groups tab.

Right-click:

1. Right-click in the Custom Groups tab.
2. Click the New Group option.

Adding Items to a Group

To add items to a custom group:

1. Select the shapes and/or connectors you want to include in the group. To select multiple items, click and drag or hold down the CTRL key.
2. On the Custom Groups tab, click the check box under the for the required group.
   All selected items are now members of the group.

Removing Items from a Group

To remove items from a custom group:

1. Select the shapes and/or connectors you want to remove from the group. To select multiple items, click and drag or hold down the CTRL key.
2. On the Custom Groups tab, clear the check box under the for the required group.
   All selected items are removed from the group.

Showing and Hiding Groups

To hide the shapes and connectors in a group, clear the check box under the in the Custom Groups tab.

Selecting the Members of a Group

You can select items that are members of a group. This is useful if, for example, you want to apply a style to group items without having to select each member individually.

To select the members of a group:

1. On the Custom Groups or Project Groups tab, select the required group.
3. Click the Select Members option.
   The members of the group are selected (indicated by the sizing handles).
Deleting Custom Groups

To delete a custom group:
1. In the Custom Group tab, select the required group.
2. On the Model menu, click the Group option.
3. Click the Delete Group option.

You cannot delete groups from the Project Groups tab.

Using Project Groups

NVivo also provides ‘project groups’ based on the attributes and relationship types in your project.

Using project groups you can

Show or hide cases based on attribute values

You can use the Project Groups tab to show or hide cases based on their attribute values.
For example, you could display just the cases who are female.
To show or hide cases based on their attribute values:
1. Add cases to the model—refer to Adding Project Items to Models for more information. The Project Groups tab is populated with the available attribute values.
2. On the Project Groups tab, clear the check boxes for the attribute values you want to hide.

Show or hide relationships based on type

You can use the Project Groups tab to show or hide relationships based on their type.
For example, you could display only relationships that are of the type works with.
To show or hide relationships based on their type:
1. Add relationships to the model—refer to Adding Project Items to Models for more information.
2. The Project Groups tab is populated with the associated relationship types.
3. On the Project Groups tab, clear the check box under the for the relationships you want to hide.

The check box is disabled for project groups.
Laying Out Models

When working with models, you can drag shapes and connectors to the required location. NVivo also provides a number of auto layout options that are a good starting point for arranging items—experiment to find the one that best fits your data.

To apply an auto-layout option:
1. Open the required model—it is displayed in **Detail View**.
2. Click the **Model** menu.
3. Click the **Layout** option.
   The **Model Layout** dialog box is displayed.
4. From the **Layout** drop-down list, select the required layout.

<table>
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<tbody>
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Directed Arrange items in force-directed layout—this is the calculated 'best fit' for the physical space (all edges are of more or less equal length and there are as few crossing edges as possible). This layout is often used for three dimensional models.
Hierarchical

Arrange items in a hierarchy:

Orthogonal

Arrange items in a right-angled layout:

5. Set a minimum length for connectors in the model. This determines the distance between items in the model.

6. Click OK.

You can set a default model layout on the Display tab in Applications Options. This default will apply to all new projects created in NVivo.
Creating a Static Model

You can create a static model from an existing model—this is useful if you want to take a snapshot of your project at a specific point in time.

Static models are not linked to live data.

To create a static model:
1. In Navigation View, click the Models button.
2. In List View, click the required model.
3. On the Project menu, click Create As.
4. Click the Static Model option.

Right-click:
1. In List View, right-click the required model.
2. Click the Create as Static Model option.

Zooming in on Models

You can "zoom in" to get a close-up view of a model or "zoom out" to see more of a model at a reduced size.

To set the zoom level:
1. Open the required model—it is displayed in Detail View.
2. Click in the model.
3. On the View menu, click the Zoom option.
   The Zoom dialog box is displayed.
4. Select the required magnification.
5. Click OK.

On the View toolbar, click the Zoom button:
Copying Models

You can copy and paste a model into a models folder—or paste it into another model. To copy a model:

1. In List View, click the model you want to copy. Click and drag to select multiple consecutive models or hold down the CTRL key to select non-consecutive models.
2. On the Edit menu, click Copy.
3. In Navigation View, select the destination model folder or open the required model.
4. On the Edit menu, click Paste. The model is copied into the selected folder. If the name already exists in List View, a number is appended—First Thoughts(2). In the open model, the copied models are displayed as new shapes with corresponding names and connectors.

Main toolbar:

1. Click the Copy button:
2. Click the required destination folder or open model.
3. Click the Paste button.

Right-click:

1. Right-click in the model List View.
2. Click the Copy option.
3. Right-click the required destination folder or open model.
4. Click the Paste option.

Deleting Models

To delete a model:

1. In List View, click the model you want to delete. Click and drag to select multiple consecutive models, hold down the CTRL key to select multiple non-consecutive models.
2. On the Edit menu, click Delete.
3. Click Yes to confirm.

DELETE Key

1. In the List View, click the required model.
2. Press the DELETE key.
3. Click Yes to confirm.

Right-click:

1. In the List View, right-click the required model.
2. Click the Delete option.
3. Click Yes to confirm.
Exporting Models

You can export a model as an image. You can choose to export your model as a BMP (bitmap) or as an SVG (scaled vector graphic). This can be useful if you want to share a model with someone who does not have NVivo.

To export a model:
1. In the List View, select the required model.
2. On the Project menu, click Export Model.
   The Save As dialog box is displayed.
3. In the Save in list, select the destination for the exported file.
4. In the File name field, enter a name for the exported file.
5. In the Save as type field, select the format for the exported file.
6. Click Save.

You can also select multiple models for export. Read more

Select multiple models for export by holding down either the SHIFT key for a range of items or CTRL key for non-consecutive items, as you click with your mouse.

When you export multiple items, all the items will be exported to the same file type. You will need to select the file type, and then choose the folder to store the exported files.

When you export a model containing NVivo icons to SVG, the icons are exported separately from the model image; an SVG file is created and an associated folder of icons. If you want to copy the exported SVG image, you must copy both the SVG file and the associated folder.

To open the exported SVG image, double-click on the SVG file. SVG images can be viewed in web browsers including Mozilla Firefox and Internet Explorer (requires the Adobe SVG Viewer plug-in). SVG images can also be opened by some vector image editors including Microsoft Visio.

**A Quick Way To Do This**

Right-click:
1. In List View, right-click on the required model.
2. Click the Export option.
3. Click the Export Model option.

Shapes and Connectors

Adding Shapes to a Model

When working with a model in Detail View, you can add a shape that is not linked to an existing project item —this can be useful for sketching early thoughts or hypotheses.
To add an unlinked shape:
1. On the **Model** menu, click **New Shape**.
2. Click the required shape.
   The shape is added to the model.
3. If required, double-click the shape to define the properties.
   The **Shape/Connector Properties** dialog box is displayed.
4. Enter a name in the **Name** field—this will be the text displayed in the shape.
5. If required, enter a description in the **Description** field.
6. Click **OK**.
   Refer to [Adding Project Items to Models](#) for information about adding shapes that are 'live' to the data.

### A Quick Way To Do This

**Click and Drag:**

1. Click a shape in the Shapes Palette.
2. Drag it to the required location in the model.

**Right-click:**

1. Right-click the model workspace.
2. Click the New Shape option
3. Click the required shape.

---

**Adding Connectors to a Model**

When working with a model in Detail View, you can add a connector between two shapes:
1. Select the required shapes. Click and drag or hold down the CTRL key to select two shapes.
2. On the **Model** menu, click **New Connector**.
3. Click the required arrow direction.
   - One way
   - Associative
   - Symmetrical
   The connector is added from the first to the second selected item.

### A Quick Way To Do This

**Right-click:**

1. Select the required shapes.
2. Right-click the selection and select the **New Connector** option.
3. Select the required direction.
To reverse the direction of the arrow:
1. Select the connector.
2. On the Model menu, click Reverse Direction.

Editing Shape and Connector Names

To edit the name and description of a shape or connector.
1. Click on the required shape.
2. On the Model menu, click Shape/Connector Properties. If the selected shape represents an existing project item, this option is Project Item Properties.
   The Shape/Connector Properties dialog box is displayed.
3. Edit the required details. If you edit the details for a linked project item, the linked item is updated in your NVivo project—not just in the model.
4. Click OK.

Right-click: 
Right-click linked shapes and click the Project Item Properties option.
OR
Right-click unlinked shapes and click the Shape/Connector Properties option.

Filling a Shape with an Image

You can add images or photos to a model by using the photo or image file as the shape's fill. For example, cases on a model could display the photos of research participants.

To fill a shape with an image:
1. Open the required model—it is displayed in Detail View.
2. Select the required shape.
3. On the Format menu, click the Fill option.
   The Fill dialog box is displayed.
4. Select the Image option.
5. Click the Browse button.
   The Select Fill Image dialog box is displayed.
6. In the Files of type drop-down list, select the format of the required image.
7. Select the required image.
8. Click Open.
9. Click OK.
   The image is displayed as the background of the shape.
Formatting Shapes and Connectors

When working with a model in Detail View you can format shapes and connectors. You can define:

- **The font used for text inside shapes and beside connectors**
  - You can choose from the set of fonts available in your system.
  - To edit the font for the text in shapes or beside connectors:
    1. Select the required shape or connector.
    2. On the **Format** menu click the **Font** option.
       - The **Font** dialog box is displayed.
    3. In the **Font** list, click the required font.
    4. In the **Font Style** list, click the required format.
    5. In the **Size** list, click the required point size.
    6. In the **Effects** panel, check the boxes to apply **Underline** and/or **Strikeout** formatting to the font.
    7. In the **Color** drop-down list, click the required color for the font.
    8. In the **Script** drop-down list, select the required international script type.
       - You can preview your selections in the **Sample** box.
    9. Click **OK**.

- **The line style used for connectors and shape borders**
  - 1. Select the required shape or connector.
  - 2. On the **Format** menu, click the **Line** option.
     - The **Line** dialog box is displayed.
  - 3. Select the line style from the **Style** drop-down list.
  - 4. Select the thickness of the line from the **Weight** drop-down list.
  - 5. Select the line color from the **Color** drop-down list.

- **The background (fill) color for shapes**
  - 1. Select the required shape.
  - 2. On the **Format** menu, click the **Fill** option.
     - The **Fill** dialog box is displayed.
  - 3. To fill the shape with a selected color, click the **Color** option and select the required color from the drop-down list.
  - 4. To fill the shape with an image (.bmp or .jpg), click the **Image** button and browse to select the required image.
  - 5. Click **OK**.

You can also apply a style to a selected shape or connector. Styles enable you to apply multiple formats in one simple click. For more information, refer to **Applying Styles to Shapes and Connectors**.

Applying Styles to Shapes and Connectors

When working with a shape or connector in a model you can change the way it looks by

- Selecting the required options from the Edit toolbar
- Selecting the required options from the Format menu
- Applying a style

Using styles, you can apply a group of formats in one simple click. NVivo provides a default style and, if required, you can change its formats. You can also add new styles.

You can create and edit model styles in Application Options and Project Properties.

Converting Shapes to Project Items

When working with a model in Detail View, you can convert an unlinked shape to a shape that represents an existing project item:

1. Click the required shape.
2. Click the Convert To option.
3. Click the Project Item option.
   
   The Select Project Items dialog box is displayed.
4. On the left, click the folder containing the required project item.
5. On the right, click the check box for the required item.
   
   You can click the Filter button to find project items based on specific criteria. If a node has a nickname, you can select it from the Select item from nickname drop-down list.
6. Click OK.
   
   The shape is converted to a ‘live’ project item and is displayed with the relevant icon.
Moving Shapes and Connectors

When working with a model in **Detail View**, you can arrange shapes to suit your requirements. Shapes and their connectors move together. If you drag a shape to a new location its connector will follow.

You cannot move a connector on its own.

To move a shape:
1. Click the required shape. To select multiple shapes, click and drag or hold down the CTRL key.
2. Drag to the required location.
   Any connectors for the shape will extend to the new location.

Resizing Shapes and Connectors

When working with a model in **Detail View**, you can resize shapes and connectors to suit your requirements.

To resize a shape:
1. Click the required shape or connector.
   Handles are displayed when the shape is selected.
2. Click and drag a handle to resize.

Deleting Shapes and Connectors

When working with a model in **Detail View**, you can delete selected shapes and connectors.

Deleting a shape that is linked to an existing project item, does not delete the item from the project unless you choose the **Delete From Project** option.
To delete a shape or connector from a model:
1. Select the required shape or connector.
2. On the **Edit** menu, click **Delete**.

### A Quick Way To Do This

**DELETE key:**
1. Click the required shape.
2. Press the DELETE key.

**Right-click:**
1. Right-click on the required shape.
2. Click the Delete option.
Charts

About Charts

For easier analysis, you can create 2D and 3D charts to visually present your coding or display your matrix query results. For example, you might want to present how your cases are divided into Age Groups:

Using the Chart Wizard, you can generate colorful charts to:

- Compare the top 20 nodes used to code a particular source. For example, chart the source *Video-Non Volunteers* to show the nodes by percentage of coverage. For these nodes, show either the number of references or the number of cases.
- Look at the different sources that are coded at a node. For example, chart the node *Motivation* to see which sources are coded at this node and their corresponding percentage of coverage.
- Display cases by attribute value for one or two attributes. For example, chart the attribute *Age Group* to see which age group (e.g. 30-39) most of your cases belong to.
- Show coding by attribute value for a source or a node. For example, chart the node *Motivation* to show coding by attributes *Age Group* and *Country*.
- Show coding by attribute value for multiple nodes or sources. For example, chart the nodes *Motivation* and *Aspirations about volunteering tasks* to show coding by the attribute *Age Group*.
- Visually display matrix query results.

You can view project data information by moving your mouse over each element in the chart. You can also double-click on a chart element to open the related source or node in Detail View.

When there is not enough space to fully display the chart legend, a partial legend is displayed with the text ‘more...’ at the bottom. You can make more space for the legend by re-sizing or undocking the Detail View—refer to Customizing the Workspace for more information.
Various chart display types are available in 2D or 3D styles including pie, bar, column, heat map, bubble chart and radar. Refer to What Type of Chart Should I Use? for more information.

Chart formatting options include angle adjustments for 3D charts, color palette for titles and labels, and selecting grid lines to display/hide. Refer to Formatting Charts for details.

---

Although you cannot save a generated chart within your project, you can copy it to paste in a memo, create a picture source or export it as an image or PDF. Refer to Copying and Exporting Charts for details.

---

**Creating Charts**

You can create charts for sources, nodes, attributes and query results (including matrices).

To create a chart:

1. In 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 type of chart you want to generate. Refer to Selecting Chart Options for details.

4. Click **Finish** to generate the chart.

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

---

**Using the toolbar:**

In the **View** toolbar, click on the **Charts** icon.

---

To create a chart for a selected source, node, attribute, matrix or query result in **Detail View**:

1. Select the project item in **Detail View**.

2. In the **Project** menu, click **Chart <Item>** or **Chart <Item Coding>**.

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

---

**Right-click:**

1. Right-click on the item in **List View**.

2. Click **Chart <Item>** or **Chart <Item Coding>** to generate.

---

To create a chart for one or more sources or nodes by attribute value in **List View**:

1. Select the project item in **List View**. You can select multiple items by holding down the CTRL key as you click with your mouse.
2. In the **Project** menu, click **Chart <Item Coding> by Attribute Value**.  
   The **Chart Options** dialog box is displayed.

3. Select additional options. Refer to **Selecting Chart Options** for details.

4. Click **OK**.  
   The chart is displayed in **Detail View**.

   ➤ **A Quick Way To Do This**
   
   **Right-click:**
   1. Right-click on the selected item or items in **List View**.
   2. Click **Chart <Item Coding> by Attribute Value** to generate.

   To create a chart of cases for one or two selected **attributes** in List View:
   1. Select one or two attributes in **List View**. To select two attributes, hold the CTRL key and click on the required items.
   2. In the **Project** menu, click **Chart Cases by Attribute Value**.  
      The chart is displayed in **Detail View**.

   ➤ **A Quick Way To Do This**
   
   **Right-click:**
   1. Right-click on the attribute/s selected in **List View**.
   2. Click **Chart Cases by Attribute Value** to generate.

Although you cannot save a generated chart within your project, you can copy it to paste in a memo, create a picture source or export it as an image or PDF. Refer to **Copying and Exporting Charts** for details.

**Selecting Chart Options**

When you first create a chart using the **Chart Wizard**, you are given a set of options to select the data and type of chart you want to create. You can still change the selected options after the chart is generated in **Detail View**—right-click on the chart and click **Chart Options**. The options can also be accessed from the **Project** menu.

There are different options you can choose depending on the type of chart you want to create:
<table>
<thead>
<tr>
<th>Item</th>
<th>Option</th>
<th>This enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart Items:</td>
<td>Source</td>
<td>Click <strong>Select</strong> to choose the source you want to create a chart for.</td>
</tr>
<tr>
<td>X-axis:</td>
<td>Most coded nodes</td>
<td>Display the nodes most used in coding the source (by percentage coverage). Indicate the number of nodes to show using the options list.</td>
</tr>
<tr>
<td></td>
<td>Selected nodes</td>
<td>Click the <strong>Select</strong> button to choose the nodes to display.</td>
</tr>
<tr>
<td>Y-axis:</td>
<td>Percentage coverage</td>
<td>Display how much of the source is coded at the nodes shown on the x-axis.</td>
</tr>
<tr>
<td></td>
<td>Number of coding references</td>
<td>Display the number of times the source has been coded at the nodes shown on the x-axis.</td>
</tr>
<tr>
<td></td>
<td>Number of words coded</td>
<td>Display how many words in the source were coded at the nodes shown on the x-axis.</td>
</tr>
<tr>
<td></td>
<td>Duration coded</td>
<td>Display the total timespan coded at the nodes shown on the x-axis for an audio or video source (if this is the type of source selected).</td>
</tr>
<tr>
<td></td>
<td>Number of cases coded</td>
<td>Display, for the selected source, the number of cases coded at the nodes shown on the x-axis.</td>
</tr>
<tr>
<td>Z-axis:</td>
<td>None</td>
<td>Display no user data on z-axis.</td>
</tr>
<tr>
<td></td>
<td>Selected users</td>
<td>Click the <strong>Select</strong> button to display coding done by selected users for this source.</td>
</tr>
<tr>
<td>Chart display type:</td>
<td>List of chart display types</td>
<td>Click on the <strong>chart display type</strong> you want to use. A preview is provided on the right panel.</td>
</tr>
<tr>
<td></td>
<td>Display in 3D</td>
<td>Check the box to display the chart selected in 3D format, if available.</td>
</tr>
<tr>
<td>Item</td>
<td>Option</td>
<td>This enables you to...</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Chart Items:</td>
<td>Node</td>
<td>Click <strong>Select</strong> to choose the node you want to create a chart for.</td>
</tr>
<tr>
<td>X-axis:</td>
<td>Most coded sources</td>
<td>Display the sources most coded at this node. Indicate the number of sources to show using the options list.</td>
</tr>
<tr>
<td></td>
<td>Selected sources</td>
<td>Click the <strong>Select</strong> button to choose the sources to display.</td>
</tr>
<tr>
<td>Y-axis:</td>
<td>Percentage coverage</td>
<td>Display how much of each source shown on the x-axis is coded at the node.</td>
</tr>
<tr>
<td></td>
<td>Number of coding references</td>
<td>Display the number of times each source shown on the x-axis has been coded at the node.</td>
</tr>
<tr>
<td></td>
<td>Number of words coded</td>
<td>Display how many words in each source shown on the x-axis were coded at the node.</td>
</tr>
<tr>
<td></td>
<td>Duration coded</td>
<td>Display the total timespan coded at the node for each audio/video source shown on the x-axis.</td>
</tr>
<tr>
<td></td>
<td>Number of cases coded</td>
<td>Display the number of cases coded at the node for each source shown on the x-axis.</td>
</tr>
<tr>
<td>Z-axis:</td>
<td>None</td>
<td>Display no user data on z-axis.</td>
</tr>
<tr>
<td></td>
<td>Selected users</td>
<td>Click the <strong>Select</strong> button to display coding done by selected users.</td>
</tr>
<tr>
<td>Chart display type:</td>
<td>List of chart display types</td>
<td>Click on the <em>chart display type</em> you want to use. A preview is provided on the right panel.</td>
</tr>
<tr>
<td></td>
<td>Display in 3D</td>
<td>Check the box to display the chart selected in 3D format, if available.</td>
</tr>
</tbody>
</table>
### Cases by attribute value for an attribute

<table>
<thead>
<tr>
<th>Item</th>
<th>Option</th>
<th>This enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart Items:</td>
<td>X-axis attribute</td>
<td>Click <strong>Select</strong> to choose the <em>attribute</em> you want to create a chart for.</td>
</tr>
<tr>
<td></td>
<td>X-axis: All attribute values</td>
<td>Display all the <em>attribute values</em> of the selected <em>attribute</em> you are charting.</td>
</tr>
<tr>
<td></td>
<td>All attribute values except 'Unassigned', 'Not Applicable'</td>
<td>Display all the <em>attribute values</em> of the selected <em>attribute</em> you are charting but do not include the 'Unassigned' and 'Not Applicable' values. If you have relabeled these attribute values, e.g. hyphen or 'Neutral', these will still be considered as the same values and will not be included.</td>
</tr>
<tr>
<td></td>
<td>Selected attribute values</td>
<td>Choose only specific <em>attribute values</em> of the selected <em>attribute</em> to display on the x-axis. If this option is chosen, the <strong>Select</strong> button will become active.</td>
</tr>
<tr>
<td>Y-axis:</td>
<td>Number of matching cases</td>
<td>Display the number of cases that match the <em>attribute values</em> shown on the x-axis.</td>
</tr>
<tr>
<td>Attribute value display order:</td>
<td>As defined in attribute</td>
<td>Display <em>attribute values</em> on the x-axis in the order defined under the <em>attribute</em>.</td>
</tr>
<tr>
<td></td>
<td>Descending Y-axis value</td>
<td>Display <em>attribute values</em> on the x-axis from greatest to least number of matching cases.</td>
</tr>
<tr>
<td></td>
<td>Ascending Y-axis value</td>
<td>Display <em>attribute values</em> on the x-axis from least to greatest number of matching cases.</td>
</tr>
<tr>
<td>Chart display type:</td>
<td>List of chart display types</td>
<td>Click on the chart display type you want to use. A preview is provided on the right panel. Note that selecting some chart types may disable other options.</td>
</tr>
<tr>
<td></td>
<td>Display in 3D</td>
<td>Check the box to display the chart selected in 3D format, if available.</td>
</tr>
</tbody>
</table>
### Cases by attribute value for two attributes

<table>
<thead>
<tr>
<th>Item</th>
<th>Option</th>
<th>This enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chart Items:</strong></td>
<td>X-axis attribute</td>
<td>Click <strong>Select</strong> to choose the attribute you want to create a chart for.</td>
</tr>
<tr>
<td></td>
<td>Z-axis attribute</td>
<td>Click <strong>Select</strong> to choose a second attribute to compare with the x-axis attribute selected.</td>
</tr>
<tr>
<td><strong>X-axis attribute:</strong></td>
<td>All attribute values</td>
<td>Display all the attribute values of the selected x-axis attribute.</td>
</tr>
<tr>
<td></td>
<td>All attribute values except 'Unassigned', 'Not Applicable'</td>
<td>Display all the attribute values of the selected attribute you are charting but do not include the 'Unassigned' and 'Not Applicable' values. If you have relabeled these attribute values, e.g. hyphen or 'Neutral', these will still be considered as the same values and will not be included.</td>
</tr>
<tr>
<td></td>
<td>Selected attribute values</td>
<td>Choose only specific attribute values of the selected x-axis attribute to display. If this option is chosen, the <strong>Select</strong> button will become active.</td>
</tr>
<tr>
<td><strong>Y-axis:</strong></td>
<td>Number of matching cases</td>
<td>Display the number of cases that match the attribute values shown on the x-axis and z-axis.</td>
</tr>
<tr>
<td><strong>Z-axis attribute:</strong></td>
<td>All attribute values</td>
<td>Display all the attribute values of the selected z-axis attribute.</td>
</tr>
<tr>
<td></td>
<td>Selected attribute values</td>
<td>Choose only specific attribute values of the selected z-axis attribute to display. If this option is chosen, the <strong>Select</strong> button will become active.</td>
</tr>
<tr>
<td><strong>Attribute value display order:</strong></td>
<td>As defined in attribute</td>
<td>Display attribute values on the x-axis and z-axis in the order defined under the attributes selected.</td>
</tr>
<tr>
<td></td>
<td>Descending Y-axis value</td>
<td>Display attribute values on the x-axis and z-axis from greatest to least number of matching cases.</td>
</tr>
<tr>
<td></td>
<td>Ascending Y-axis value</td>
<td>Display attribute values on the x-axis from least to greatest number of matching cases.</td>
</tr>
</tbody>
</table>
**Chart display type:**

List of chart display types

Click on the *chart display type* you want to use. A preview is provided on the right panel.

Note that selecting some chart types may disable other options.

**Display in 3D**

Check the box to display the chart selected in 3D format, if available.

Note

---

**Coding by attribute value for a node**

<table>
<thead>
<tr>
<th>Item</th>
<th>Option</th>
<th>This enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chart Items:</strong></td>
<td>Node</td>
<td>Click Select to choose the node you want to create a chart for.</td>
</tr>
<tr>
<td>X-axis attribute</td>
<td>Click Select to choose the <em>attribute</em> you want to create a chart for.</td>
<td></td>
</tr>
<tr>
<td>Z-axis attribute</td>
<td>Click Select to choose a second <em>attribute</em> to compare with the x-axis attribute selected. Click Clear to remove the selection.</td>
<td></td>
</tr>
<tr>
<td><strong>X-axis attribute:</strong></td>
<td>All attribute values</td>
<td>Display all the <em>attribute values</em> of the selected x-axis <em>attribute</em>.</td>
</tr>
<tr>
<td></td>
<td>All attribute values except 'Unassigned', 'Not Applicable'</td>
<td>Display all the <em>attribute values</em> of the selected <em>attribute</em> you are charting but do not include the 'Unassigned' and 'Not Applicable' values. If you have relabeled these attribute values, e.g. hyphen or 'Neutral', these will still be considered as the same values and will not be included.</td>
</tr>
<tr>
<td></td>
<td>Selected attribute values</td>
<td>Choose only specific <em>attribute values</em> of the selected x-axis <em>attribute</em> to display. If this option is chosen, the Select button will become active.</td>
</tr>
<tr>
<td><strong>Y-axis:</strong></td>
<td>Percentage coverage</td>
<td>Display how much of the coding done at the node is represented by each <em>attribute value</em> shown on the x-axis and z-axis.</td>
</tr>
</tbody>
</table>

---
<table>
<thead>
<tr>
<th><strong>Number of coding references</strong></th>
<th>Display the number of times each <em>attribute value</em> shown on the x-axis and z-axis has been coded at the node.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of cases coded</strong></td>
<td>Display the number of cases coded at the node for each attribute value shown on the x-axis and z-axis.</td>
</tr>
<tr>
<td><strong>Z-axis attribute:</strong></td>
<td>Display all the <em>attribute values</em> of the selected z-axis <em>attribute</em>.</td>
</tr>
<tr>
<td><em>All attribute values</em></td>
<td>[This item will be available if you selected an attribute to display in the z-axis]</td>
</tr>
<tr>
<td><strong>Selected attribute values</strong></td>
<td>Choose only specific <em>attribute values</em> of the selected z-axis <em>attribute</em> to display. If this option is chosen, the Select button will become active.</td>
</tr>
<tr>
<td><strong>Attribute value display order:</strong></td>
<td>Display <em>attribute values</em> on the x-axis and z-axis in the order defined under the <em>attributes</em> selected.</td>
</tr>
<tr>
<td>As defined in attribute</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Descending Y-axis value</td>
<td>Display <em>attribute values</em> on the x-axis and z-axis from greatest to least y-axis values.</td>
</tr>
<tr>
<td>Ascending Y-axis value</td>
<td>Display <em>attribute values</em> on the x-axis and z-axis from least to greatest y-axis values.</td>
</tr>
<tr>
<td><strong>Chart display type:</strong></td>
<td>Click on the chart display type you want to use. A preview is provided on the right panel.</td>
</tr>
<tr>
<td>List of chart display types</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Display in 3D</td>
<td>Check the box to display the chart selected in 3D format, if available.</td>
</tr>
</tbody>
</table>
### Coding by attribute value for a source

<table>
<thead>
<tr>
<th>Item</th>
<th>Option</th>
<th>This enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chart Items:</strong></td>
<td>Source</td>
<td>Click <strong>Select</strong> to choose the source you want to create a chart for.</td>
</tr>
<tr>
<td></td>
<td><strong>X-axis attribute</strong></td>
<td>Click <strong>Select</strong> to choose the attribute you want to create a chart for.</td>
</tr>
<tr>
<td></td>
<td><strong>Z-axis attribute</strong> (optional)</td>
<td>Click <strong>Select</strong> to choose a second attribute to compare with the x-axis attribute selected. Click <strong>Clear</strong> to remove the selection.</td>
</tr>
<tr>
<td><strong>X-axis attribute:</strong></td>
<td>All attribute values</td>
<td>Display all the attribute values of the selected x-axis attribute.</td>
</tr>
<tr>
<td></td>
<td>All attribute values except 'Unassigned', 'Not Applicable'</td>
<td>Display all the attribute values of the selected attribute you are charting but do not include the 'Unassigned' and 'Not Applicable' values. If you have relabeled these attribute values, e.g. hyphen or 'Neutral', these will still be considered as the same values and will not be included.</td>
</tr>
<tr>
<td></td>
<td>Selected attribute values</td>
<td>Choose only specific attribute values of the selected x-axis attribute to display. If this option is chosen, the Select button will become active.</td>
</tr>
<tr>
<td><strong>Y-axis:</strong></td>
<td>Percentage coverage</td>
<td>Display how much of the coding done in the source is represented by each attribute value shown on the x-axis and z-axis.</td>
</tr>
<tr>
<td></td>
<td>Number of coding references</td>
<td>Display the number of times each attribute value shown in the x-axis and z-axis has been used to code the source.</td>
</tr>
<tr>
<td></td>
<td>Number of cases coded</td>
<td>Display the number of cases used to code the source for each attribute value shown on the x-axis and z-axis.</td>
</tr>
</tbody>
</table>
### Z-axis attribute:

- **All attribute values**
  - Display all the attribute values of the selected z-axis attribute.
- **Selected attribute values**
  - Choose only specific attribute values of the selected z-axis attribute to display. If this option is chosen, the Select button will become active.

### Attribute value display order:

- **As defined in attribute**
  - Display attribute values on the x-axis and z-axis in the order defined under the attributes selected.
- **Descending Y-axis value**
  - Display attribute values on the x-axis and z-axis from greatest to least y-axis values.
- **Ascending Y-axis value**
  - Display attribute values on the x-axis and z-axis from least to greatest y-axis values.

### Chart display type:

- **List of chart display types**
  - Click on the chart display type you want to use. A preview is provided on the right panel.
- **Display in 3D**
  - Check the box to display the chart selected in 3D format, if available.

### Coding by attribute value for nodes

<table>
<thead>
<tr>
<th>Item</th>
<th>Option</th>
<th>This enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart Items:</td>
<td><strong>Nodes</strong></td>
<td>Click Select to choose the nodes you want to create a chart for.</td>
</tr>
<tr>
<td>X-axis attribute</td>
<td><strong>All attribute values</strong></td>
<td>Click Select to choose the attribute you want to create a chart for.</td>
</tr>
<tr>
<td>X-axis attribute:</td>
<td><strong>All attribute values</strong></td>
<td>Display all the attribute values of the selected x-axis attribute.</td>
</tr>
<tr>
<td></td>
<td><strong>All attribute values except 'Unassigned', 'Not Applicable'</strong></td>
<td>Display all the attribute values of the selected attribute you are charting but do not include the 'Unassigned' and 'Not Applicable' attribute values.</td>
</tr>
</tbody>
</table>
Applicable' values.
If you have relabeled these attribute values, e.g. hyphen or 'Neutral', these will still be considered as the same values and will not be included.

<table>
<thead>
<tr>
<th>Selected attribute values</th>
<th>Choose only specific attribute values of the selected x-axis attribute to display. If this option is chosen, the Select button will become active.</th>
</tr>
</thead>
</table>

**Y-axis:**

<table>
<thead>
<tr>
<th>Percentage coverage</th>
<th>Display how much of the coding done at the node is represented by each attribute value shown on the x-axis and z-axis.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of coding references</td>
<td>Display the number of times each attribute value shown on the x-axis and z-axis has been coded at the node.</td>
</tr>
<tr>
<td>Number of cases coded</td>
<td>Display the number of cases coded at the node for each attribute value shown on the x-axis.</td>
</tr>
</tbody>
</table>

**Attribute value display order:**

<table>
<thead>
<tr>
<th>As defined in attribute</th>
<th>Display attribute values on the x-axis in the order defined under the attributes selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Descending Y-axis value</td>
<td>Display attribute values on the x-axis from greatest to least y-axis values.</td>
</tr>
<tr>
<td>Ascending Y-axis value</td>
<td>Display attribute values on the x-axis from least to greatest y-axis values.</td>
</tr>
</tbody>
</table>

**Chart display type:**

<table>
<thead>
<tr>
<th>List of chart display types</th>
<th>Click on the chart display type you want to use. A preview is provided on the right panel.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display in 3D</td>
<td>Check the box to display the chart selected in 3D format, if available.</td>
</tr>
</tbody>
</table>
### Coding by attribute value for sources

<table>
<thead>
<tr>
<th>Item</th>
<th>Option</th>
<th>This enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart Items:</td>
<td>Sources</td>
<td>Click <strong>Select</strong> to choose the sources you want to create a chart for.</td>
</tr>
<tr>
<td>X-axis attribute</td>
<td></td>
<td>Click <strong>Select</strong> to choose the attribute you want to create a chart for.</td>
</tr>
<tr>
<td><strong>X-axis attribute:</strong></td>
<td>All attribute values</td>
<td>Display all the attribute values of the selected x-axis attribute.</td>
</tr>
<tr>
<td></td>
<td>All attribute values except 'Unassigned', 'Not Applicable'</td>
<td>Display all the attribute values of the selected attribute you are charting but do not include the 'Unassigned' and 'Not Applicable' values. If you have relabeled these attribute values, e.g. hyphen or 'Neutral', these will still be considered as the same values and will not be included.</td>
</tr>
<tr>
<td></td>
<td>Selected attribute values</td>
<td>Choose only specific attribute values of the selected x-axis attribute to display. If this option is chosen, the <strong>Select</strong> button will become active.</td>
</tr>
<tr>
<td><strong>Y-axis:</strong></td>
<td>Percentage coverage</td>
<td>Display how much of the coding done in the source is represented by each attribute value shown on the x-axis.</td>
</tr>
<tr>
<td></td>
<td>Number of coding references</td>
<td>Display the number of times each attribute value shown in the x-axis has been used to code the source.</td>
</tr>
<tr>
<td></td>
<td>Number of cases coded</td>
<td>Display the number of cases used to code the source for each attribute value shown on the x-axis and z-axis.</td>
</tr>
<tr>
<td><strong>Attribute value display order:</strong></td>
<td>As defined in attribute</td>
<td>Display attribute values on the x-axis in the order defined under the attributes selected.</td>
</tr>
</tbody>
</table>
Descending Y-axis value: Display attribute values on the x-axis from greatest to least y-axis values.

Ascending Y-axis value: Display attribute values on the x-axis from least to greatest y-axis values.

Chart display type: List of chart display types
- Click on the chart display type you want to use. A preview is provided on the right panel.

Display in 3D
- Check the box to display the chart selected in 3D format, if available.

---

Matrix

<table>
<thead>
<tr>
<th>Item</th>
<th>Option</th>
<th>This enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart Items:</td>
<td>Matrix</td>
<td>Click Select to choose the matrix to display in the chart.</td>
</tr>
<tr>
<td>Content display options:</td>
<td>Sources coded count</td>
<td>Display the number of sources coded.</td>
</tr>
<tr>
<td></td>
<td>Cases coded count</td>
<td>Display the number of cases coded.</td>
</tr>
<tr>
<td></td>
<td>Words coded count</td>
<td>Display the number of words coded.</td>
</tr>
<tr>
<td></td>
<td>Coding references count</td>
<td>Display the number of coding references.</td>
</tr>
<tr>
<td></td>
<td>Duration coded</td>
<td>Display the timespan coded for audio/video sources.</td>
</tr>
<tr>
<td>Chart display type:</td>
<td>List of chart display types</td>
<td>Click on the chart display type you want to use. A preview is provided on the right panel.</td>
</tr>
</tbody>
</table>
Formatting Charts

You can adjust the formatting of charts created in NVivo as follows:

- Change the title of the chart
- Change the font style of the chart title and axes labels
- Hide/display the chart legend, data value labels and gridlines
- Change 3D rotation and zoom levels

When a chart is generated, the formatting options are displayed on the right side of the chart image. Any changes you make take effect immediately.

You can click on the various tabs to access each set of options:

1. To change the title font style and hide/display the legend or data value labels, click on the General tab:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>By default, the chart title is displayed. You can clear the Show check box to hide the title. You can also modify the title by typing in the field box provided. Use the drop-down arrow to select your preferences for alignment, font, size, and color. Click on the check boxes to indicate if you want the typeface to be in bold, italic or underline.</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>Click the Legend check box to display the chart legend. The legend can be positioned above, below or beside the chart. Use the drop-down arrow to choose the location. Click the Data value labels check box to display data values on the chart.</td>
</tr>
</tbody>
</table>

2. To change the font style for axes labels and hide/display gridlines, click on the Axes tab:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Axes labels</td>
<td>By default, the axes labels are displayed. You can clear the corresponding check box to hide a specific label. Use the drop-down arrows to select your preferences for font, size, and color. Click on the check boxes to indicate if you want the typeface to be in bold, italic or underline.</td>
</tr>
<tr>
<td>Major and minor gridlines</td>
<td>Click the corresponding check boxes to display the gridlines for the chart.</td>
</tr>
</tbody>
</table>
3. To change the 3D chart rotation and zoom levels, click on the 3D tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rotation</td>
<td>Use the sliders to rotate the chart. You can change the angle of each axis by entering the specific measure in the relevant fields or using the arrow buttons. Check the chart image as you make changes to view the effect.</td>
</tr>
<tr>
<td>Zoom</td>
<td>You can use the up and down arrows to select the level of zooming or use the slider provided.</td>
</tr>
</tbody>
</table>

Although you cannot save a generated chart or any changes you have made in the chart format, you can copy it to paste into a memo, create a picture source or export it as an image or PDF. Refer to Copying and Exporting Charts for details.

### Copying and Exporting Charts

You will not be able to save the chart within the project. To capture the chart for later review or analysis within the project, you can copy the image and paste it in a memo or paste it as a picture. For presentation or reporting purposes, you can export each chart as a PDF or as an image (.jpg, .jpeg, .bmp or .gif).

#### To Copy a Chart and Create a Picture Source

1. Click on the open chart in **Detail View**.
2. In the **Edit** menu, click **Copy**.
3. Click on the folder where you want to store the new source.
4. In the **Edit** menu, click **Paste**. The **New Picture** dialog box is displayed.
5. Enter the **Name** and **Description**.
6. Click **OK**. The new picture source is created.

Refer to **Copying Pictures** for more details.

### Right-click

1. Right-click on the open chart in **Detail View**.
2. Click **Copy**.
3. Right-click on the folder to store the new source.
4. Click **Paste**. The **New Picture** dialog box is displayed.
5. Enter the **Name** and **Description**.
6. Click **OK**. The new picture source is created.
To Export a Chart as PDF or Image

1. Click on the open chart.
2. In the Project menu, click Export Chart.
   The Save As dialog box is displayed.
3. In the Save in list, select the destination for the exported file.
4. In the File name field, enter a name for the exported source.
5. In the Save as type field, select the format for the exported item. You can export the chart in .pdf, .jpg, .jpeg, .bmp or .gif format.
6. Click Save.
Reports

About Reports

You can run the following reports in NVivo:

- **Project Summary**: lists 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**: lists the sources in the project including the number of nodes that code them. It also contains information about paragraph and word length.

- **Node Summary**: lists 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**: lists the relationships organized by relationship type. This gives you an indication of the number of different relationship type and how much coding has been done for each relationship type.

- **Attribute Summary**: lists the attributes and displays 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**: lists the sources and the nodes that code it. You can report on sources coded by all users or selected users—a useful way to check the progress of coding.

Exporting Reports

You can export a report to work with it in other applications. The available formats for export include:

- Microsoft Word (.doc)
- Rich Text Format (.rtf)
- Microsoft Excel (xls)
- Portable Document Format (.pdf)
- HTML (.htm)

To export a report:

1. On the Tools menu, click Reports.
2. Select the required report.
3. Define the report format options. Different options are displayed depending on the type of report. Refer to specific report Help topics for details.
4. Click OK to run the report. The report is displayed in the Report Viewer.
5. Click the Export Report button on the toolbar:
   - The Export Report dialog box is displayed.
6. Select the required format and location.
7. Click the Save button.
Project Summary

This report displays the properties of your project (for example, project name and description), the user profiles associated with your project, and lists all the items within your project. This report can be useful for communicating or recording the overall progress of your project.

To run a project summary report:
1. On the Tools menu, click Reports.
2. Click the Project Summary option.
   The Customize Project Summary Report dialog box is displayed.
3. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folders</td>
<td>Select which folders are included in the scope of the report.</td>
</tr>
<tr>
<td></td>
<td>- Choose All Folders to include all project folders in your report</td>
</tr>
<tr>
<td></td>
<td>- Choose Selected Folders to select specific folders to include in your report</td>
</tr>
<tr>
<td></td>
<td>Click the Include folder description check box to include the description as defined in the folder properties.</td>
</tr>
<tr>
<td>Folder name format</td>
<td>Select to display the folder name (Emails) or to include the hierarchical name (Documents/Focus Group/Emails).</td>
</tr>
<tr>
<td>Order folders by</td>
<td>Choose to order the folders by their name or by their hierarchical name.</td>
</tr>
<tr>
<td>Include project items</td>
<td>Click the check box to list details of items in your project.</td>
</tr>
<tr>
<td></td>
<td>Click the required check box for the Description (as defined in the project item properties).</td>
</tr>
<tr>
<td></td>
<td>Click the check boxes for Created and Modified to include the user initials and corresponding dates.</td>
</tr>
<tr>
<td>Item name format</td>
<td>Select to display the project item name (Adventure) or to include the hierarchical name (Tree Nodes/Images of Volunteers/Adventure).</td>
</tr>
<tr>
<td>Order Items by</td>
<td>Depending on the items you selected to include, you can choose to order:</td>
</tr>
<tr>
<td></td>
<td>- Alphabetically by Name (Adventure)</td>
</tr>
<tr>
<td></td>
<td>- Alphabetically by Hierarchical name (Tree Nodes/Adventure)</td>
</tr>
<tr>
<td></td>
<td>- In Custom order as displayed in List View.</td>
</tr>
</tbody>
</table>
• Creation User Initials -- by users who created the project item
• Modification User Initials -- by users who modified the project item

4. Click **OK**. The **Report Viewer** is displayed.
5. Click the **Print** toolbar button to print the report.

**Source Summary**

This report lists the sources in the project. For each source, it shows source properties and statistics, including the number of nodes and cases that code the source.

Source statistics vary depending on the type of source—for example, document source statistics include the total number of words and paragraphs, and media source statistics show the duration of the recording and the total number of transcript rows and words.

To run a source summary report:
1. On the **Tools** menu, click **Reports**.
2. Click the **Source Summary** option.
   The **Customize Source Summary Report** dialog box is displayed.
3. Select the required options
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sources</td>
<td>Select which sources are included in the scope of the report.</td>
</tr>
<tr>
<td></td>
<td>Choose <strong>All Sources</strong> to include all project sources in your report</td>
</tr>
<tr>
<td></td>
<td>Choose <strong>Selected Sources</strong> to select specific sources to include in your report</td>
</tr>
<tr>
<td>Name format</td>
<td>Select to display the name (<strong>Project Journal</strong>) or to include the hierarchical name (<strong>Documents/Project Notes/Project Journal</strong>).</td>
</tr>
<tr>
<td>Order by</td>
<td>Choose to order the sources alphabetically by name or by the source type and name (<strong>Externals/Focus Group Audio</strong>).</td>
</tr>
</tbody>
</table>
4. Click **OK**. The **Report Viewer** is displayed.
5. Click the **Print** toolbar button to print the report.
Node Summary

This report lists the nodes in the project. It provides statistical information about the node—for example; the total words coded to a node, the number of sources coded at a node, and the number of users who have coded at a node.

This can help you to see which themes or ideas are occurring more than others.

To run a node summary report:

1. On the Tools menu, click Reports.
2. Click the Node Summary option.
   
   The Customize Node Summary Report dialog box is displayed.
3. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Nodes                   | Select which nodes are included in the scope of the report:
|                         |   • Choose All Nodes to include all project nodes in your report |
|                         |   • Choose All Nodes with a Nickname to include only nodes which have a Nickname in your report |
|                         |   • Choose Selected Nodes to select specific nodes to include in your report |
|                         | Click the Include node description check box to include the description as defined in the node properties. |
|                         | Click the Include Coding Details check box to include statistical information about each source coded. |
| Name format             | Select to display the:
|                         |   • Name only (Adventure) |
|                         |   • Folder and name (Tree Nodes/Adventure) |
|                         |   • Hierarchical name (Images of volunteers/Adventure) |
|                         |   • Folder and hierarchical name (Tree Nodes/Images of Volunteers/Adventure) |
| Order by                | Choose to order:
|                         |   • Alphabetically by type and name (Tree Nodes/Adventure) |
|                         |   • Alphabetically by Name (Adventure) |
|                         |   • In custom order as displayed in List View. |
|                         |   • Creation User Initials—by users who created the project item |
4. Click OK. The Report Viewer is displayed.
5. Click the Print toolbar button to print the report.

Relationship Summary

This report lists the relationships organized by relationship type. This gives you an indication of how much coding has been done for each relationship type.

To run a relationship summary report:
1. On the Tools menu, click Reports.
2. Click the Relationship Summary option.
   The Customize Relationship Summary Report dialog box is displayed.
3. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationships</td>
<td>Select which relationships are included in the scope of the report.</td>
</tr>
<tr>
<td></td>
<td>● Choose <strong>All Relationships</strong> to include all project relationships in your report</td>
</tr>
<tr>
<td></td>
<td>● Choose <strong>Selected Relationships</strong> to select specific relationships to include in your report</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Include relationship type description</strong> check box to include the description as defined in the relationship type properties.</td>
</tr>
<tr>
<td>Include list of relationships</td>
<td>Select to list the relationships of each type.</td>
</tr>
<tr>
<td>Include folder names</td>
<td>If you selected to list relationships, then you can choose to include folder name (From Tree Nodes/Contexts to Tree Nodes/Images of Volunteers).</td>
</tr>
<tr>
<td>Order by</td>
<td>Select to order relationships by the <strong>From</strong> or <strong>To</strong> side of the relationship.</td>
</tr>
</tbody>
</table>

4. Click OK. The Report Viewer is displayed.
5. Click the Print toolbar button to print the report.
**Attribute Summary**

This report lists the attributes and displays the number of cases assigned to each attribute value. This is a useful way of checking for consistency and balance in the project sample.

To run an attribute summary report:
1. On the **Tools** menu, click **Reports**.
2. Click the **Attribute Summary** option.
   The **Customize Attribute Summary Report** dialog box is displayed.
3. Select the required options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attributes</td>
<td>Select which attributes are included in the scope of the report.</td>
</tr>
<tr>
<td></td>
<td>- Choose <strong>All Attributes</strong> to include all project attributes in your report</td>
</tr>
<tr>
<td></td>
<td>- Choose <strong>Selected Attributes</strong> to select specific attributes to include in your report</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Include Descriptions</strong> check boxes to include the descriptions for Attribute and/or Attribute value as defined in the attribute or attribute type properties.</td>
</tr>
<tr>
<td>Include list of cases</td>
<td>Select to list cases by attribute value.</td>
</tr>
<tr>
<td>Cases</td>
<td>If you selected to list cases, then choose to list <strong>All Cases</strong> or choose to list <strong>Selected Cases</strong> and click the <strong>Select</strong> button and choose specific cases.</td>
</tr>
<tr>
<td>Name format</td>
<td>Select to display:</td>
</tr>
<tr>
<td></td>
<td>- Name only (Anna)</td>
</tr>
<tr>
<td></td>
<td>- Folder and name (Cases/ Anna)</td>
</tr>
<tr>
<td></td>
<td>- Hierarchical name (Participants/Anna)</td>
</tr>
<tr>
<td></td>
<td>- Folder and hierarchical name (Cases/Participants/Anna)</td>
</tr>
</tbody>
</table>

4. Click **OK**.
   The **Report Viewer** is displayed.
5. Click the Print toolbar button to print the report.
Coding Summary

This report lists the sources and the nodes that code it. You can include sources coded by all users or only sources coded by selected users. This report is a useful way to check the progress of coding.

To run a coding summary report:
1. On the Tools menu, click Reports.
2. Click the Coding Summary option. The Customize Coding Summary Report dialog box is displayed.
3. Select the required options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sources</td>
<td>Select which sources are included in the scope of the report.</td>
</tr>
<tr>
<td></td>
<td>● Choose All Sources to include all project sources in your report.</td>
</tr>
<tr>
<td></td>
<td>● Choose Selected Sources to select specific sources to include in your report.</td>
</tr>
<tr>
<td>Nodes</td>
<td>Select which nodes are included in the scope of the report.</td>
</tr>
<tr>
<td></td>
<td>● Choose All Nodes to include all project nodes in your report.</td>
</tr>
<tr>
<td></td>
<td>● Choose Selected Nodes to select specific nodes to include in your report.</td>
</tr>
<tr>
<td>Coded By</td>
<td>Choose which users are included in the scope of the report.</td>
</tr>
<tr>
<td></td>
<td>● Choose All Users to include all project users in your report.</td>
</tr>
<tr>
<td></td>
<td>● Choose Selected Users to select specific users to include in your report.</td>
</tr>
<tr>
<td>Include</td>
<td>Click the Source description check box to include the descriptions as defined in the source properties.</td>
</tr>
<tr>
<td>Coding reference detail</td>
<td>Select the required details of the coded reference:</td>
</tr>
<tr>
<td></td>
<td>● None: character ranges and coded text are not displayed.</td>
</tr>
<tr>
<td></td>
<td>● Character range: for example (465 - 823) indicates the beginning and end of the coding reference.</td>
</tr>
<tr>
<td></td>
<td>● Coded text and character range: the text coded at the node is displayed. Character ranges are included when you select this option.</td>
</tr>
</tbody>
</table>

4. Click OK.
   The Report Viewer is displayed.
5. Click the Print toolbar button to print the report.
User Profiles

Working in Teams

Many research projects involve multiple researchers—either to work through a large volume of data or to bring different perspectives to the project.

Where different researchers contribute to a project, it can be important to keep track of the similarities and differences in their analysis. For example, you may want to ask the questions:

- Are team members coding and using the node structure in a consistent way?
- Do differences in coding reveal any interesting insights that the team may want to pursue and discuss?
- Which sources have been created or modified by a specific user?

User Profiles

NVivo provides 'user profiles' as a way of tracking the work done by different researchers on a project.

A user profile includes the name and initials of a team member. When you first launch NVivo, you are prompted to enter your user profile—the default is based on your Windows login details but you can change the name or initials if required.

If multiple users will be accessing NVivo on the same computer with the same Windows login details, you can prompt them for their user profile each time they launch the application. To do this:

1. On the Tools menu, click Options.
2. The Application Options dialog box is displayed.
3. In the General tab, select Prompt for user on launch.

You can change the current user while working on an open project. Refer to Changing the Current User for more information.

You can see all the team members that have contributed to a project. Refer to Setting Project Properties (Users tab) for more information.

You can merge the work of two team members by removing one of the user profiles and reassigning all associated project content to the other user. Refer to Removing User Profiles for more information.

View Created and Modified Details

NVivo records the tasks done on the project against the current user profile.

When you are working in List View, you can see the created and modified user details for each item. You can click on the Created By or Modified By column header to sort the list.
**Coding Stripes and Highlighting for Users**

You can use coding stripes to see the content coded by selected team members to one or more nodes. [View example](#)

![Coding Example Image]

You can also highlight the content coded by selected team members—refer to [Highlight Coding](#) for more information.

**Filtering Nodes by User**

When exploring a node in **Detail View**, you can choose to display only the content coded by selected users. For example, you may want to see only your own coding or the coding of another team member. Refer to [Filtering Nodes by User](#) for more information.

**Running Queries**

You can include team members in the scope of coding queries. For example, you can search for all coding at the node *community* that was done by a selected team member. Refer to [Simple Coding Queries](#) and [Advanced Coding Queries](#) for details on running this type of query.

To compare the coding of two users, you can run a **Coding Comparison Query**—refer to [Coding Comparison Queries](#) for more information.
Adding User Profiles

If you are working in a team, you can add a user profile to a project in two ways: by prompting the user upon launch of the program, or by modifying the current name and initials in the application. Because NVivo considers the name unique, it will simply create a new user profile if you modify the current one.

To Add a User Profile upon Launch

1. In the Tools menu of your open project, click Options.
2. The Application Properties dialog box is displayed.
   - On the General tab, check the Prompt for user on launch box in the User field.
3. Click OK.
   - The next time the program is launched the NVivo User dialog box will pop-up to prompt the user for an update.
   
   Unless you clear the Prompt for user on launch check box, the NVivo User dialog box will pop-up every time the program is launched.

To Add a User Profile in Application Options

1. In the Tools menu, click Options.
   - The Application Properties dialog box is displayed.
2. On the General tab, enter the new user name and initials.
3. Click OK.
   - The new user details will apply to projects coded or edited from this point onwards.
   
   Once a change in any project has been recorded against it, the new user profile will be added to the list of users under Project Properties.

Viewing User Profiles

You can view user details in two places: in the Application Options and Project Properties.

To View the Current User Profile

1. In the Tools menu, click Options.
   - The Application Properties dialog box is displayed.
2. On the General tab, the user names and initials are displayed.
   
   You can also see the initials of the current user displayed in the status bar. Hover over the initials to see the full user name.
To View the List of Users for an Open Project

1. In the **File** menu of your open project, click **Project Properties**.
   - The **Project Properties** dialog box is displayed.
2. Click on the **Users** tab.
   - The list of users is displayed. The current user profile is displayed in bold.

Changing the Current User

You can switch users during an **NVivo** session:

1. On the **Tools** menu, click **Options**.
   - The **Application Options** dialog box is displayed.
2. Enter the name and initials of the new user.
   - The new user’s initials are displayed in status bar.

   If you enter a name that does not exist in the project, a new profile is automatically created when that user makes changes to the project. You can check the users defined for the project in **Project Properties**.

Changing User Initials

To change the initials for the users in a project:

1. On the **File** menu, click **Project Properties**.
   - The **Project Properties** dialog box is displayed.
2. Click the **Users** tab. The current user is displayed in bold.
3. Click in the **Initials** field and update as required.
4. Click **OK**.

   You can also change user initials at application level. This means the changes will apply to all projects you will work on or create from that point onwards. Refer to **Setting Application Options** and **Adding User Profiles** for details.

   You can merge the work of two users by removing one of the user profiles and reassigning all associated project content to the other user. Refer to **Removing User Profiles** for more information.
Removing User Profiles

You can remove user profiles from your NVivo project. When you remove a user profile, you must nominate a replacement profile, so that all project content associated with the deleted user profile can be reassociated with another user. Removing a user profile allows you to merge the work of two users together.

To Remove a User Profile:

1. On the File menu, click Project Properties.
   The Project Properties dialog box is displayed.
2. Click the Users tab.
3. Select the user profile you want to delete.
4. Click Remove.
   The Select User dialog box is displayed.
5. Select a replacement user. All project content associated with the user you are removing, will be reassociated with the replacement user.
6. Click OK.
   The user profile is removed and all associated project content is reassociated with the replacement user.

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You cannot remove the current user.

It is a good idea to make a copy of your project before you remove a user profile. Refer to Copying and Backing-up Projects for more information.
A

advanced find: Facility used to find project items based on specific criteria. You access Advanced Find by clicking Options on the Find Bar (at the top of List View.)

ancestor node: Tree nodes or cases above a selected node.

annotation: Text that can be linked to selected content in a source--like scribbled notes in the margin.

attribute: A classification of a case, such as gender, age or location

attribute value: The values of an attribute. For example, 'male' or 'female'.

audio: Source materials such as recorded interviews, music, sound effects, and other forms of audio that may be relevant to your research. Types of audio files that can be imported into NVivo include *.mp3, *.wma, *.wav. An audio source contains the audio file and a transcript column.

auto code: A quick way of coding that uses heading styles or paragraph numbers to create nodes and code at them.

B

boolean operator: The use of AND, OR or NOT to combine search terms.

C

case: A node with attributes such as gender or age. You can use cases to gather content about a person, site, institution or other entity involved in your research. Like tree nodes, case nodes can also be organized in hierarchies.

casebook: A matrix displaying cases, attributes and attribute values. You can create cases, attributes and values in NVivo or you can import them from a tab-separated text file. To open the casebook, on the Tools menu click Casebook > Open Casebook.

child node: A node below a parent node.

classification: In NVivo, 'classification' refers to relationship types and attributes. Relationship types provide a way of 'classifying' relationships and attributes provide a way of 'classifying' cases.

coded at: When you select text and categorize it as belonging to a specific node (theme or idea), the text is said to be 'coded at' the node.

coding: Selecting source content and defining it as belonging to a particular topic or theme. By creating nodes and coding at them, you can catalogue your ideas and gather material by topic.

coding context: The words, paragraphs and heading levels that surround coded text in a source. When exploring a node, you can choose to spread coding to the selected context.

coding density: Areas in a source or node in which most coding occurs. The Coding Density bar is visible when you display Coding Stripes. The color graduations indicate the coding density from light gray (minimal coding) to dark gray (maximum coding).

coding excerpt: A passage of text coded at a node. When exploring a node, you can set display options for coding excerpts (View>Coding Excerpts).

coding reference: An occurrence of coding. When you open a node, you can see all the references to source material that are gathered there.

coding stripes: Colored stripes that enable you to see coding in a source or node.

connector: A line that joins shapes in a model.

coverage: The percentage of a source that is coded at a node.

custom group: A model group that you create. You can include shapes and connectors in the group and show or hide them as required.
detail view: The bottom-right pane in NVivo. You explore documents, nodes and models in this view. You can choose to 'undock' detail view if you want to work with sources, nodes or models in a separate window.

document: Source material such as field notes, transcripts, interviews, literature reviews or whatever material that is relevant to your project. You can 'code' a document (or any part of it) to categorise the information that it contains. You can import documents or create them in NVivo.

embed: To store a media file inside your NVivo project as opposed to linking to a file stored externally.

external: Source material that cannot be imported into NVivo. This might include items such as newspaper articles, books, video footage or audio tape. You can use the external to represent the un-importable material and record any notes or summaries that can be coded as required.

folder: A place in Navigation View for storing your project items. You can create your own folders for organizing sources, queries and models.

free node: A free node is a 'stand-alone' node that has no clear logical connection with other nodes and does not easily fit into a hierarchical structure. You can convert a free node into a tree node by moving it into a tree node folder.

grouped find: Grouped Find enables you to list selected items and find the items related to them. You access Group Find by clicking Options on the Find Bar (at the top of List View.)

hyperlinks: A link from content in a source to a file or URL outside of your NVivo project.

image: Term is used to refer to graphic or photo files found outside a picture source. Types of image files include bmp, gif, jpg, jpeg, tif, and tiff.

links: In NVivo, links refer to memo links, annotations and 'See Also' links.

list view: The top-right pane in the NVivo window. You view the contents of your NVivo folders in List View.

log entry: Comments, descriptions, notes, hyperlinks, or ideas entered against the whole or portion of the image in a picture source. A picture source may or may not contain a log entry.

matrix: A matrix is a collection of nodes resulting from a Matrix Coding Query.

media file: Refers to both audio and video files.

memo: A type of source that you might use to record thoughts and observations. If a memo is related to a particular source or node you can create a 'memo link' and link the two together.

memo link: The link between a source or node and a memo. A memo can only be linked to one item.

mixed method: The combination of quantitative and qualitative research methods.

model: A visual representation of your project and its contents.
**model style:** A set of formatting characteristics that you can apply to shapes or connectors in a model to quickly change its appearance.

**navigation view:** The panel on the left side of the NVivo window. It contains buttons that enable you to access project items.

**nickname:** A short name given to nodes for quick coding.

**node:** A container for a theme or topic within your data. For example, you can create a node called ‘community’ and code all community-related data at it. When you open the node you can see all the community-related data gathered in one place. Types of nodes include, free nodes, tree nodes, cases, relationships, matrices and results.

**paragraph:** Text or images between two carriage returns. You can apply a style to content in a paragraph.

**paragraph number:** Paragraph numbers can be included when printing or exporting a source or node. In a node, paragraph numbers relate to a reference’s position in the source.

**parent node:** A top tree node or case which is above other nodes in a hierarchy.

**picture:** A type of source that contains a picture file and log entries.

**picture file:** Can be an image copied from a document, a frame from a video source, or a region from a picture source. Types of picture files include bmp, gif, jpg, jpeg, tif, and tiff.

**playhead:** Refers to the blue slider that indicates the point where the playing/paused media is at. It can be dragged to allow play/pause from any specific point in a video or audio file.

**project group:** A group within a model that is created based on existing attributes or relationship types. These groups enable you to show or hide cases based on their attribute values and relationships based on their type. You cannot add items to or delete items from project groups. To use these groups, your model must contain cases or relationships.

**query:** A way of asking questions about your data. You can save a query and run it as your project progresses.

**read-only:** Source content that cannot be edited. A source is read-only when coding stripes are displayed or when the read-only check box is selected in the source’s properties.

**region:** A selected portion of a picture.

**relationship:** A node that defines the connection between two project items. For example, the relationship between two cases (Anne loves Bill) or between two nodes (Poverty impacts Health).

**relationship type:** A word or words (usually verbs) which define the relationship between two project items. For example, ‘impacts’, ‘causes’ ‘employs’ ‘loves’ and so on. Relationship types also have a direction.

**relevance:** In text search results, relevance indicates the finds which are the ‘best match’ for the scope and criteria you have defined. The rating is derived from (1) the relevance weighting given to the text (if any), (2) the number of scope items, (3) the number of finds in the scope, (4) number of finds in a particular scope item and (5) criteria in your query.

**results:** A node or list of project items resulting from a query. You can store a results node in the Queries Results folder or move to the main node system for coding.

**right-click:** Click the button on the right side of your mouse.

**see also link:** A link from selected content in a source or node to selected content (or entire content) in another source or node.

**set:** A collection of shortcuts to project items.
shadow coding: Indirect coding in an audio or video source - when you code a transcript entry, the corresponding portion of the media is 'shadow coded'. When you view coding stripes, this 'indirect' coding appears as a shadow on a coding stripe.

sibling node: Tree nodes or cases that share the same parent node.

source: In NVivo, 'sources' is the collective term for your research materials anything from hand-written diaries to interview transcripts in Microsoft Word format. You store sources in the Documents, Externals or Memos folders.

static model: A 'snapshot' of an existing model. You cannot edit static models and they are not linked to live data.

system folder: Folders that are supplied with NVivo such as documents, memos and externals. You cannot delete or rename system folders.

text style: A set of formatting characteristics that you can apply to text to quickly change its appearance.

thumbnails: Miniature images or graphics. They refer to List View options which allow you to display items in small, medium or large sized miniature graphics for easy identification and review.

timeline: Displays the duration of the audio or video file.

timespan: A timespan is the duration of time for a transcript entry. For example, Jane spoke from the two minute point to the ten minute point (00:02:00-00:10:00). When importing transcript entries from a table, you can include a timespan for each row in the table.

transcript: Contains audio or video transcriptions against specific timespans. You can also include notes, hyperlinks or comments in the transcript or content column as needed in your research. Transcripts can be coded on their own or as part of a specific timespan.

tree node: Nodes that are organised in a hierarchical structure moving from a general category at the top (the parent node) to more specific categories (child nodes). You can use them to organize nodes for easy access, like a library catalogue.

user profile: Includes the name and initials of a user or team member.

video: Source materials such as focus group discussion videos, tv ads and other forms of video that may be relevant to your research. Types of video files that can be imported into NVivo include *.mpg, *.mpeg, *.wmv, *.avi, and *.mov. A video source contains the video file and a transcript column.

video frame: A static picture that can be captured from a video.

wildcards: A keyboard character such as an asterisk (*) or a question mark (?) that is used to represent one or more characters when you are searching for project items such as sources, nodes or sets. For example: g*t will find get, great and gt