

NVivo 8 workshop notes

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These notes are designed as a reference manual for continuing work after a training workshop. More extensive self-help resources, along with extensive methodological explanation and advice, can be found in *Qualitative Data analysis with NVivo* (Bazeley, 2007, London: Sage). Data preparation notes and other resources are available from my web site.

▸ Instructions are marked thus. Words in **bold** are from the screen dialogues.

Instructions are supplemented by:

✓ Tips, and **! Warnings.** ✓ Note: RMB = right mouse button.

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Creating, naming, and storing projects

Creating a new project

- › Creating a project in NVivo is as simple as clicking on **New Project** at the base of the Welcome screen, and typing a **Title** for the project into the New Project dialogue. Add a Description if you wish, to help identify this particular project.
- › If you need to set a password and/or access rights to the project, this is done once the project has been created, by accessing **File > Project Properties**. Unless you have a compelling reason to do so (or a faultless memory), it is generally safer to *not* set a password for the project.

When you have created a project, it will be added to the **My Recent Projects** list on the Welcome screen, and you will be able to reopen it with a single click on its name.

Identifying the user

NVivo will assume that the user is the same as the person identified in Windows. If you need to allow for multiple users accessing the same computer, then you can have NVivo ask for the user to be identified each time it is opened:

- › From **Tools > Options** check/uncheck the box next to **Prompt for user on launch**.

Saving the project

- › You will be asked every 15 minutes whether you wish to save changes to your project. Click **Yes** (or press Enter) to ensure your work is not lost.
- › This time lapse can be shortened or lengthened via **Tools > Options**, but be aware that the pop-up reminder does interrupt what you are doing, so more frequent is not necessarily better, and less frequent carries obvious attendant risks regarding loss of work should the power go off or the program close for some reason.
- ✓ If your project is on a network drive, the intermediate saves, until you close the project, will be into a Temp folder on your local drive.

! Do *not* work from an E (USB/flash) drive – if the power goes off suddenly, an open project is likely to be corrupted.

Renaming a project

- › A project can be renamed by going to **File > Project Properties**. To avoid confusion, you should also change the file name (in Windows) to match the project name. The *project name* is a registry entry recognised by the software and which shows in the Welcome window and at the top of the NVivo workspace; the *file name* is what you will see in Windows dialogues.

! Do *not* change a project's *file name* in Windows while the project is open.

Backing up

- › Backing up a project is most easily done in Windows. Copy the project file, and paste it into a specially designated folder or onto an external drive, and date it.

! Do not copy a project while it is open.

Deleting a project

Just in case you want to start over!

- Projects are deleted through the regular Windows file system (Windows Explorer, My Documents, My Computer).

Creating an internal document or memo in NVivo

- Go to **New** on the Main toolbar,

OR

- In the Navigation View for Sources, select the folder in which the document or memo is to be created.
- Right-click in the List View (in the white space). Select **New Document** or **New Memo** (as appropriate), OR, click in the List View, and press **Ctrl+Shift+A** on your keyboard.
- A **Properties** dialogue will open. Type in a **Name** and **Description** for the document or memo. The new document will then open in Detail View.

Importing sources (internals) into NVivo

Documents saved as Word files (document format, rich text format, or if you're really desperate, plain text format) are easily imported into NVivo. You can also import audio, video and image files in various formats (see Help, or the options on the import screen, for a list of OK formats), and you can import .pdf files (these are converted to Word document format on import).


- In the Navigation View for Sources, select the folder into which the source is to be imported.
- In the List View, **RMB > Import Internals**.
- An **Import Internals** dialogue will open, requesting the location of the files to be imported, and some information about what is to be done with those files.
 - Navigate to locate the files you wish to import. Multiple documents can be imported in one pass: simply use Shift-Click or Ctrl-Click to select more than one when choosing documents for import.
 - For text documents, indicate if the first paragraph of the document/s should be used to **Create descriptions** for those documents.
 - If each document represents a case, then choose to **Code sources at cases** and indicate where they are to be located (i.e. directly under Cases, or in a folder within Cases).
- ✓ Sources can be coded to cases at any time after import, as well as on import (*cf.* p.13).
- ✓ If heading/paragraph styles are important because you are planning to auto code a document, check them in Word, using Outline View, before you import the document. It is much easier to make corrections there than after you have auto coded in NVivo.
- ✓ Check **Help > embedding media** re options for storing video and audio files; also **Tools > Options** to set limits on the size of embedded files.

Arranging and viewing sources

Creating and using folders

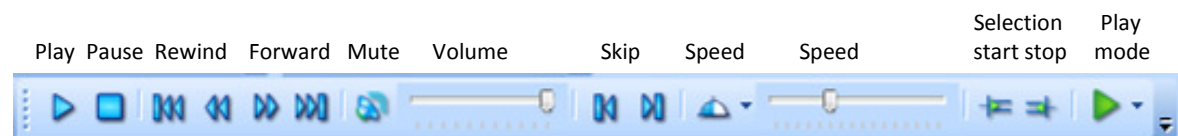
- ▶ In the Navigation View for Sources, right-click on **Internals** to create and name a **New Folder**. Drag documents from the List View to the appropriate folder.

Viewing document text

- ▶ Double-click on a document in List View for the text to be shown in the Detail View, below the list of documents. More than one document can be open at a time, but the text of only one will be visible at any one time.
- ▶ Select which open document is currently in view by clicking on its tab at the top of the detail view.
- ▶ Close a document by clicking the  (top right in Detail View).
- ▶ Right-click on a particular document to view the **Document Properties** (or press **Ctrl+Shift+P**). If it is helpful, you can add or change a description for the document in this dialogue.

Playing audio/video files

- ▶ Double click the file to open it in Detail View.
- ▶ Click on **Play** in the Media toolbar. You can also choose to pause, fast forward, rewind, etc. from the media toolbar.



- ▶ You can transcribe within NVivo. Check **Help > Search >** (and type) **Transcribe while playing**, and **Help > transcribing** for options on combining transcripts with audio/video files. Transcribing within NVivo allows you to create time-stamped segments of text to match the wave file.

Add additional columns to log entries for audio/video files

- ▶ From the File menu, select **Project Properties** and then the **Audio/Video** tab. Custom transcript fields can be added or removed for either audio or video.
- ✓ Custom fields will be displayed for all video or audio files in the project.

Viewing images

- ▶ Double click the file to open it in Detail View. Options for working with pictures are mostly in either the View menu or the Picture menu, or on the RMB menus.
- ▶ Optionally choose whether or not to record a log for selected regions in the picture (**View > Log**).


Images can be shown as thumbnails in List View (if you want to restrict which pictures are included, make a set of them and view thumbnails in the set, *cf.* Help > picture gallery):

- ▶ Click in the List View (to make it active).
- ▶ From the View menu, select **List View**, and then an option for detail (the default view) or thumbnail (small, medium or large).


Managing sources: Folders, Sets or Cases?

	Folders	Sets	Cases
Accessed in...	Sources view	Sets view	Nodes view
How many can a single source be in?	One only	More than one	Ideally one only, but can be in more than one (! watch counts)
What does it do?	Visual organization, sorting and management of files	Conceptual or theoretical or pragmatic organization of any combination of sources and/or nodes	Identifying units of analysis; Locating attribute data about those units
How is it used?	Scoping a query; To rapidly include a number of sources as separate items in a matrix query	To treat multiple sources as a single data item in a matrix query; Scoping a query	Within case analysis (setting as a scope); Across case analysis (as items in a matrix); Filtering in Find, a query or a model
Included in a matrix query rows or columns as...	Member items	Single entity	Case nodes
Scoping a query (setting which data are to be searched by the query)	Can select one or more folders	Can select one or more whole sets (as items within the Sets folder)	Can select one or more cases, folders of cases, or groups of cases based on filtering by attribute
Special features	Can be converted to a set or node	Can be converted to a node	

Memos, annotations and links

	Source linked memos	Node linked memos	Annotations	See also links	Hyperlinks
Primary use	Notes re key points in a source; observations; reflective thoughts relevant to the source as a whole	Reflective thoughts about the concept or case represented by the node; ideas for further analysis	Notes which illuminate or reflect on a specific part of the text or image (seen in a source or node)	Links from a specific point in the source to related project items, including other sources, passages or nodes.	Links from points within text sources (.doc or .pdf) to non-project on-line items or websites
Display to indicate presence	Icon next to source in List View	Icon next to node in List View	Blue highlight on text	Pink highlight on text	Underlined blue text
Coding of linked item	Can be coded	Can be coded	Can't be coded (code the anchor)	N/A (code the anchor)	Can't be coded (code the anchor)
Searching for a word or phrase	Content can be searched	Content can be searched	Content can be searched	N/A	Can't be searched
How many can you have?	One linked memo per source	One linked memo per node	As many as are needed	As many as are needed	As many as are needed
Help topic	About memo links	About memo links	About annotations	About see also links	Hyperlinks
To create:	From source item in either List or Detail View: RMB>Memo Link>Link to New Memo; or Ctrl+Shift+K		RMB>Links from selected text in source or node; or select icon ( or ) in Links toolbar*		RMB>Links from selected text in editable source
To view:	RMB>Memo Link>Open Linked Memo; key Ctrl+Shift+M		View>Annotations; or click on 	View>See also links; or click 	Ctrl+click on highlighted text

*If your See Also Link is to a selected extract:

- ▶ Highlight and copy the selected extract (e.g., video segment, text passage).
- ▶ Go to where you want the link to come from, select an 'anchor' (e.g., brief text passage) and **RMB > Paste as See Also Link**. The anchoring text will be highlighted in pink to indicate the presence of a linked extract.
- ▶ Access See Also Links from below the text by turning on **View > See Also Links** or clicking on  in the View toolbar.

Linking media files

Memos, annotations and see also links can be added to media files.

- › For memos, link as for documents.
- › For annotations and see also links, select as for coding.

Making nodes



There are multiple ways of making nodes, either as you are working through the text or when you are just thinking about the categories you might need.

Making nodes without coding

- › To begin making nodes, select the Nodes tab in the Navigation View for your project; select **Free Nodes**.
 - › To create a free node without coding: In the white space below the list of nodes: **RMB > New Free Node**. You will then need to select text and code it.
 - › To create a new tree node (parent node): Select **Tree Nodes** in Navigation View, and click **New** in the main toolbar. Alternatively, in the List View area, *below any existing nodes*, **RMB > New Tree Node**, or **Ctrl+Shift+A**.
 - › Provide a name for the new node (and a description if you want).
- ! If you have a Tree Node selected when you choose New Tree Node, the new node will be placed as a child of the selected node.**

Creating a node and coding at the same time




To create and code at new nodes, select the Nodes tab in the Navigation View for your project; select **Free Nodes** and, with a document or memo open in the Detail View, choose from one of the following methods:

- › Select text, and from the RMB, choose **Code Selection > At New Node** to open a new node dialogue. Type a name and press Enter. This will code the selected text as well as creating the node.
 - › Select text and press **Ctrl+F3** on your keyboard, to open a new node dialogue. Type a name and press Enter. This will code selected text as well as creating the node.
 - › Select text, click in the code slot in the coding toolbar, type a name and press the Enter key or click the Code icon .
- ! Watch what kind of node you are making (Free/Tree/Case).**
- ! If you forget to click in the coding slot before typing, you will overwrite your selected text (use Undo to recover it).**
- › Highlight text (a word or phrase) and click on the In Vivo icon  in the Coding toolbar. In vivo nodes are easy to create (dangerously so) but note that only the highlighted word is coded, so having created it, you will then need to code additional text around it. In vivo nodes are always free nodes.

Changing/deleting a node

- ▶ If you want to change a node title, select the node in List View, and from the RMB choose **Node Properties** (or press **Ctrl+Shift+P**)—*or*, simply click on it a second time to change its name to edit mode.
- ▶ Selected nodes can be deleted using either the RMB, or the Delete key on your keyboard.

Adding further coding

- ▶ Highlight a passage (in Detail View), then select a node (or nodes) for coding using **Ctrl+F2** *or* **RMB > Code Selection > at Existing Nodes**, *or* using recently used nodes in the coding toolbar. These options are available whether you have nodes showing in the List View, or not.
or
- ▶ Rearrange the screen for drag-and-drop coding: Click  on the View toolbar, or choose **View > Detail View > Right**, and move the pane divider across left. With nodes showing in the List View, and the text you are coding (either document or node) in the Detail View, drag selected text to a node.
- ! Dragging text and then hesitating will result in the text being moved—use Undo to fix it. Better still, prevent it being moved (see below).
- ✓ To make the document ‘read-only’ so that it cannot be edited (so text cannot be moved accidentally as you are dragging): Turn on the coding density bar (**View > Coding Stripes > Coding Density Only**) or click on  in the View toolbar. This has the added advantage that you can immediately see what coding has been done (hover over the bar).
- ✓ Nodes in List View can be reviewed while you are thinking about which to use for coding: double-click on the node you’re thinking about, review its text, then close it to return to the source text. Alternatively, open its **Properties** (Ctrl+Shift+P) and check (or add to) its description.
- ✓ Coding can be ‘undone’ on a selected passage either by choosing to **Uncode**  (at whatever node is selected), or by immediately clicking **Edit > Undo**.
- ✓ Nodes can be deleted (**RMB > Delete** or click Delete on your keyboard), thus deleting all coding done at them.
- ✓ You can code at multiple nodes at once using Ctrl+F2 or the RMB to make your selection and code.

Coding media files

Pictures

- ▶ Drag to select a region for coding.
- ▶ Right click to choose to code to a new or existing nodes; or drag to a node.
- ✓ The matching row in the Log needs to be separately coded.

Video/audio

- From either the media toolbar (start selection icon) or the right mouse menu, mark the start of a selection on the voice file. Repeat with the appropriate choice to end the selection.
- Code the selection using the RMB or by dragging to a node.
- ✓ You can select and code only one section at a time.
- ✓ The transcript needs to be separately coded.

Moving nodes

Moving from Free to Tree

- In List View select one free node, or more than one using either **Shift+Click** or **Ctrl+Click**.
- Drag the selected node/s across to Trees in Navigation View. This will place all selected nodes at the top level; they can then be dragged into particular trees.

or

RMB > Cut the selected nodes; click on **Tree Nodes** in Navigation View to change the List View display; select the appropriate parent node for the nodes you are moving; and **RMB > Paste**. Confirm that you want to **Paste as Tree Nodes**.

- ✓ A node can be pasted or merged once only after cutting, or multiple times after copying. If a node needs to go into more than one tree (because it involved more than one concept), use Copy rather than Cut, then return to delete the original. Rename the node appropriately in each new location (nodes with the same name should not need to be in more than one tree).

Moving nodes in trees

- Nodes can be dragged from one tree to another. Alternatively, **Cut or Copy** and **Paste**. Dragging or **Paste** will place the node under the node you drag to or paste at (so you are giving it a new parent). To place a node at top level, drag to or paste at **Tree Nodes**.
- ✓ If you are having trouble dragging a node from one tree to another (dragging just seems to select everything in between), make sure you first select the node, *then* click on it again to drag it.

Merging nodes

- If you have two nodes which are about the same thing, then **Copy** the first one (or **Cut** if you are sure you want to entirely remove the first node), select the second one, and **Merge Into Selected Node**. This will place all the text references from the first (source) node into the second (target) node. Note the range of options for merging nodes and trees of nodes. (Amend the node's description to indicate what has been merged.)

! When you merge a node with a memo with another node, if you don't select to merge the memo then the memo is lost, i.e., to maintain the linked memo as a separate item you need first to break the link with the node.

Coding with tree nodes

- › Code with tree nodes as you would with free nodes.
- ! If you work with the nodes displayed, using drag-and-drop coding, remember to change the display to **Detail View Right**, and to turn on the **coding density bar**.
- › To expand a tree, click the + next to the top level node (double clicking will open the text for that tree node)
or
- › Select from the **RMB** to **Expand** (or Collapse) **All** (or a selected node).

Creating new tree nodes as you code

- › Create a new tree node as you are coding by right-clicking on the parent node for where it is to go, then select **New Tree Node** from the right-mouse menu. *You will then need to code the selected text to the new node.*
or
- › Alternatively, select text then **RMB > Code Selection > At New Node** (or use **Ctrl+F3**). In the New Node dialogue, go to **Location > Select**, then (in the next dialogue) select **Tree Nodes** in the left pane, and then the *parent* for the new node in the right pane, and **OK**. You will then be asked to name the new node. *This method codes the text as the node is created.*

Reviewing coding

- › Select a node in List View and double-click to open it. Text coded from all sources will be displayed in Detail View.
- › Check the context of a passage by clicking in it, then selecting **RMB > Coding Context** and then **Narrow** or **Broad**, or by viewing the source document: **RMB > Open Referenced Source**.
 - ✓ Narrow and broad can be defined in Tools > Options. For text, **Broad** defaults to paragraph, which is the most commonly required context.
 - ✓ If you want to *spread* the coding of a passage to the context for that passage, choose **RMB > Spread Coding**, or, select the required additional text while it is in view and choose **RMB > Code Selection at Current Node**.
- › View what other coding is on a passage using the Coding Density Bar or coding stripes. You can select (RMB) to show a particular stripe from the Coding Density Bar, and there are further options (including Uncode) from the stripe/s. Alternatively, show **selected coding stripes** across the whole node display, such as those in a particular tree or set.
- › Access the node properties (**Ctrl+Shift+P**) to record a description for the node.
- › Create a linked memo for the node (**Ctrl+Shift+K**) to record more reflective or analytic comments. View the linked memo at any time using **Ctrl+Shift+M**.
 - ✓ Always reference the source for an idea recorded in the node memo.

Coding-on

- › Recode or code on from a node as you would from a document.

- ▶ To copy coding to a parent node: Select all the child nodes (at once), **Copy**, and **Merge** with the parent.
- ▶ To code on ‘uncoded’ data from a parent node: Make a node which holds all the data in the relevant child nodes (select and **RMB > Save as a Node**), then use a Coding Query to find text coded at the parent node AND NOT coded at the new node you have just created. Save the result, then code this text to appropriate child nodes.

Listing nodes

The information displayed in the List View can be customised to suit your needs.

- ▶ Click in the List View (to make it active).
- ▶ From the View menu, select **List View > Customise Current View**. Use the arrows in the dialogue to choose which fields are shown.

To obtain a report listing your nodes with a summary of the extent to which each has been used:

- ▶ Go to **Tools > Reports > Node Summary** and select the options you want. The summary can be printed directly, or save the report in Word format for later reference and printing.



To obtain a simple list of nodes:

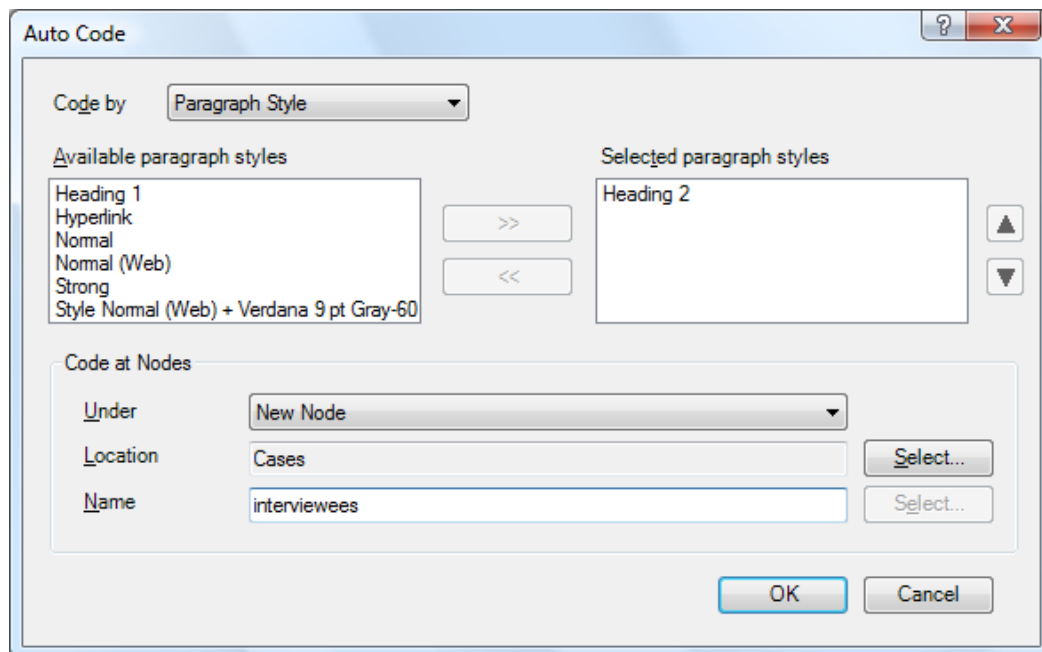
- ▶ To see the full list of tree nodes, you will need to expand all trees in your list: From the RMB choose **Expand all**.
- ▶ From the display of nodes in List View, **RMB > Export > Export List**. Select the format you want for your list: it will open either in Excel or as a table in Word.
- ✓ If you want to print/save just a list, you might want to turn off most of the added detail, such as dates and authors.
- ✓ Printing rather than exporting will preserve the appearance of the screen display, but you may have to ‘fiddle’ with the position of columns to avoid the width being spread across two pages.

Exporting or printing node contents

- ▶ Highlight the particular node/s you want to export or print in List View.
- ▶ From the RMB, select **Export/Print > Export/Print Tree Node**, and then check the Export/Print Options. To export or print text in document format, choose to **Export/Print > Reference View**. For files which may contain multimedia segments, choose to **Export > Entire Content** —this will save as .html and open as a Web page (*cf.* Help > exporting).
- ✓ If you want to print a node (or document) with coding stripes, you need to print directly from the Detail View with stripes showing, using the File > Print option.
- ✓ To print part only of a node (or document), export it first and edit in Word.
- ✓ You can change the default location for reports exported from NVivo through Tools > Options > Application Options > File Locations.
- ✓ Combine multiple node reports into a single document for printing in Word, using (in Word) **Insert > File**. Note that you can select more than one file to insert at the same time, using Ctrl+Click (be sure to include their names when exporting).

Auto coding sources

- ▶ In List View for your Documents (or a sub-folder), select the source or sources you wish to auto code (if more than one, these should be of the same type). If you are auto coding surveys or questionnaires, then do the whole set at once. If you are auto coding focus group transcripts, it might be safer to do them one at a time, especially if your method of identifying different people is repeated across groups.
- ▶ Choose to **Code > Auto Code**, or click on  in the Coding toolbar. Choose the **Paragraph Style/s** identifying the text you wish to code, and where you want the resulting nodes to be located. Note that, for both Trees and Cases, you will need to create a parent node to 'foster' the new nodes.
- ✓ For survey questions, you are likely to want to code for multiple headings at the same time to produce a node structure which replicates the structure of the survey.
- ✓ For focus groups, you are most likely to want to code for particular levels of heading in separate passes, e.g., to separate topics from cases. Note that all headings of the same type should have the same paragraph style.
- ✓ If auto coding produces a node which contains headings only (when there is another heading immediately under and you have used multiple headings), and you wish to see the text of all the subsections, then: Edit > Select All; and then RMB > Spread Coding > Heading level. This will (permanently) spread the coding for that node to include all subsections.
- ✓ If the nodes are out of order select the parent node and then click on Sort by custom . They will sort into the order in which they were created.
- ✓ If you mess up, simply Undo, or delete the nodes you have created and start again!
- ✓ NV8 can handle non-English heading style labels, and variations on 'pure' heading styles (e.g., Heading 2 + Red, etc.).



Recording relationships

Set up the relationship type

- › From within the **Classifications** area in the Navigation View, select **Relationship Types**. In the List View, right-click to create a **New Relationship Type**.
- › Provide a **Name** for the relationship type you are creating (e.g. encourages, works with, talks to, impacts on). Enter a **Description** if needed.
- › Select the **Direction** for this type of relationship, using the drop-down options. Click OK.

Recording a relationship

- › Move to the **Nodes** area, and select **Relationships** in the Navigation View.
- › Right-click in the List Area to create a **New Relationship**. Make the necessary selections for the source (**From**) and target (**To**) of the relationship, and the type (**Name**).
- › The new relationship node will appear in List View. It can be coded and viewed like any other node.
- ✓ It is advisable to use case nodes rather than documents (where appropriate) to represent research participants as part of a relationship (benefits for models).
- ✓ If you need to edit a relationship (e.g. to change from document to case node), select the relationship in List View, then: RMB > Relationship Properties.
- ✓ If you need to include a non-project item in a relationship (e.g. Ange collaborates with Professor X in the US, where Professor X is not represented in this project by either a document or case) then create an *external* source or a case node to represent the associated item (Prof. X, in this example).

Creating and populating sets

Any kind of sources or nodes can be added to a set as members.

- › In any List View for nodes or sources, select one or more items and **RMB > Create as Set**. Name the new set. Items can be members in more than one set.
- › If the set already exists and you wish to add to it, select one or more items from any List View of nodes or documents, then **RMB > Add to Set**.
- › To view the set, choose to show **Sets** in the Navigation View. Expand + **Sets** in the Navigation View. Members of a selected set will show in List View as aliases.
- › Modifying a set: deleting an item from a set will not delete the item, just the shortcut to it. If you open an item from a set and modify it, however, you are modifying the actual item.

Sets can be created also from items gathered using the Options on the Find toolbar (at the top of the list view – see p. 18).

Working with attributes

Attributes in NVivo are attached to Cases. The Case provides the mechanism by which all the information you have about each unit of analysis for your project is held together in NVivo. Because that information might be across just parts of a source, or in multiple sources, the Case information is always held in a case node. Case nodes must be created before attribute values can be stored.

Creating Cases

If your Cases are represented by single sources:

- Create Cases as you import the sources (see above); OR, if you didn't do so:
- Select the sources representing Cases in the List View, right-click, and choose **Create As > Create Cases**.

If your Cases involve multiple whole documents:

- Select the sources representing a single Case in the List View, right-click, and choose **Code Sources > At New Node**. Select **Cases** as the location, and then name the new node.

If several cases are combined within a source document (e.g., from a focus group):

- Prepare the document by using consistently applied heading (paragraph) styles to identify each case (*cf.* data preparation notes on my web site).
- Auto code the document (see *Auto coding sources*, p. 11)

Creating attributes and entering their values within NVivo

Create the attributes and their values

- Move to the **Classifications** view, and select **Attributes**. Right click in the List View, and select **New Attribute**. Provide a name for the attribute.
- Indicate a **Type** for the values of the attribute. Most attributes will be **String**, as that is any combination of letters and numbers. If the attribute comprises numeric values only, then choose **Number** to ensure that they can be correctly sorted. **Date** values are in the form of DD/MM/YYYY (or your local format), so if you are wanting to record years only, then use Number.
- Click on the **Values** tab. Click **Add**, and enter the first of the values you will be using for your attribute. Repeat this process for each value to be added. Use **Remove** if you make an error (or later, if you find you don't need this value). For some attributes you may not know ahead what kinds of values you will encounter—simply leave these ones without pre-set values for the time being.
- Repeat the process of making a new attribute and entering values for each attribute you want to record. If you find you want to add another later, that is not a problem—you can come back to this screen at any time, or you can create new values as you are entering values for each case.
- ✓ While age might be recorded as a number, age expressed in ranges (e.g. 0-4, 5-9, etc.) becomes a string attribute. The same applies to years of service or any similar variable.

- ✓ The most common error I see when people are creating attributes is that they use what should be a value label to name the attribute as a whole, e.g. they call the attribute Male, instead of Gender. Then they are limited to using yes/no values, and their use the attribute for comparisons becomes very clumsy.
- ✓ Attributes can take only one value for a particular case. If a case fits two categories (e.g. Fred has two different jobs) then you will have to either: (a) record the most relevant or important value for that person and ignore the secondary one, (b) created a combined category—but only do this if there are likely to be others with the same combination, or (c) create an additional attribute (e.g. Job 2) to record the second value (and again, only do this if there are sufficient with a second job to warrant it).

Enter values on each attribute for particular cases

- ▶ Open the casebook: **Tools > Casebook > Open Casebook**. The casebook will open in Detail View, with your cases listed as rows, and your attributes as columns. Currently the values will all be listed as Unassigned (unless you changed the default value).
- ▶ Click in a cell, and select an appropriate value from the drop-down list for that cell
- ▶ If you wish to create a new value ‘on the run’, double-click in the cell and then overtype the current entry with your new value. The new value will be added to the list and made available for further cases.
- ▶ If you find you need to change or add an attribute, slip back across to **Classifications** to do this.
- ✓ If you are entering the data as you work through a document, keep the casebook open in the background and, when you are ready to enter a value, simply click across to it (using the tabs in detail view), then click back again to your document.
- ✓ Rows in the casebook cannot be deleted. You need to delete the corresponding case node instead.

Creating and entering attribute data by importing a table

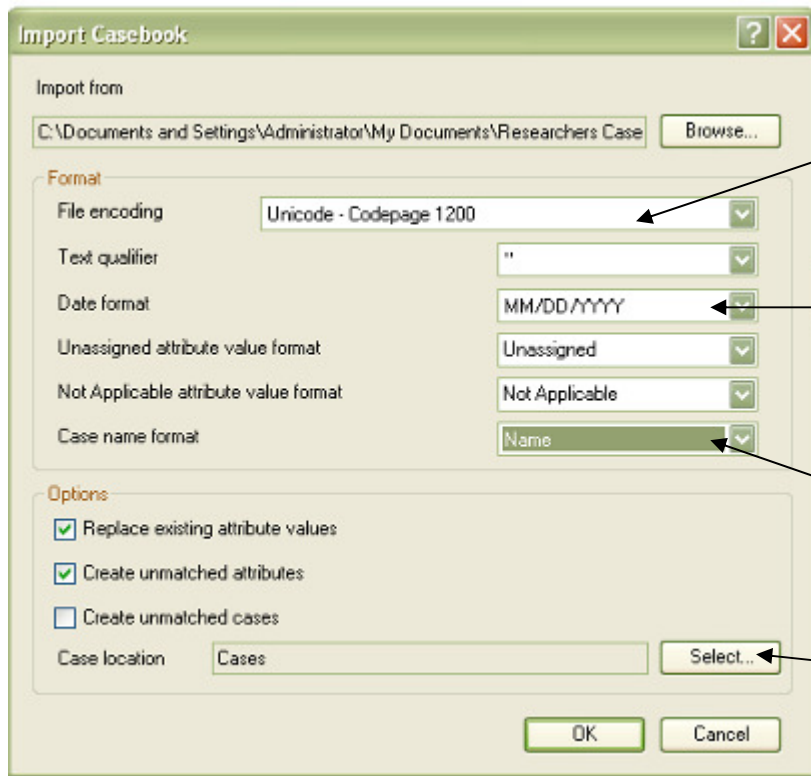
Create the table

- ▶ In a new Excel (or other) spreadsheet: (a) list your case names in the first column, exactly as they appear in NVivo (leave the first cell blank [cell A1]); (b) list your attribute names across in the first row of the table.
 - ✓ The format for case names is best viewed in the casebook itself. You can choose to show names only, rather than hierarchical names, by selecting **RMB > Casebook Case Name Format > Name** (give all your participants unique identities). If you have cases at more than one level, hierarchical names will be needed if data for all cases are to be entered at once.
 - ✓ If you are having difficulty getting the names typed correctly, then create at least one attribute (no values need be entered), then **Tools > Casebook > Export Casebook**; open Excel; select **File > Open**; change the **Files of Type** to **All Files**, select the Casebook and click **Finish** on the Import Wizard. The table will open ready for you to type in additional attributes and values.
- ▶ Enter the values for each case throughout the table. Empty cells are best left blank.
 - ✓ While SPSS and other statistical packages prefer you to use numeric codes for values (e.g. 1 for male), in NVivo it is better to enter non-numeric data as strings, using text labels (male), as these make more sense when you are reading output from the data.

- ✓ Excel has a habit of converting low number ranges (e.g. 1-3) into dates, so it is safer to write them as, say, 1 to 3. Even if you change the cells to a non-date format in Excel, this information will be lost when you convert and save the file as .txt, so that if you re-open the .txt file in Excel (e.g., to add more data) it will revert to dates.
- ▶ Save the table as **Unicode Text (*.txt)**. Note that text files will not support formatting. Close the file.
- ✓ If you export directly from SPSS to text format, you will get numeric codes only. To bring data from SPSS, first save it as an **Excel 97 or later** spreadsheet, and check **write variable names to the spreadsheet** and use **value labels** where defined. Delete unnecessary variables by unchecking in the SPSS Save As dialogue, or by deleting columns from the Excel table (think about which you will actually find useful in connection with your qualitative data). If you had any empty values, these will become #NULL! in Excel: use Replace (find #NULL! and replace with nothing) to remove them. Then, convert the Excel table to Unicode text.
- ! **If the table ends in empty cells (i.e. at the bottom right of the table) it will fail to import. Rearrange the rows in order to ensure the last row is complete.**

Import the table into NVivo

- ▶ To import the table, go to **Tools > Casebook > Import Casebook**, and work your way carefully through *all* the options. If you are not sure about any of these, go to **Help > Importing Cases and Attributes**, expand and check under **import options**. The ones to watch, in particular, are **Case name format**, also the **Options** and **Case Location** at the bottom of the dialogue.
- ▶ The Casebook will open (or update, if already open) in Detail View.
- ✓ If you saved your files as Unicode Text, then the default option in NVivo of **Unicode** format should work without any problems. If you saved it as Text (Tab delimited), then (assuming English language) you will need to select **US-ASCII** as the file format in the Import Casebook dialogue.
- ✓ NVivo will automatically recognize the best format for imported attributes, e.g. if all the values in a particular column are numeric, then NVivo will designate that attribute to be a number.
- ✓ If your data fails to import: (a) recheck through all the options; and (b) note, from the casebook, whether any of the new attributes were set up on your previous attempt, and if so, where the import appears to have stopped. This can provide a guide to where a problem may be in your original table.
- ✓ Case information in the table can be in a different order from the case names in NVivo.
- ✓ To sort the order of attribute values (which impacts on presentation of query results) for a particular attribute: navigate to **Classifications > Attributes**, double-click an attribute to open its Properties, and use the Sort button on the Values tab.



Change to US-ASCII if using tab-delimited text.

Set to your local date format, if using dates.

Change to names if that is how your table is set up (the display format in NVivo is irrelevant).

Select the parent case node for cases in your table (this will depend on case name format).

Making a report of attribute data

- ▶ Create a summary of attributes, values, and numbers of cases with each value from the **Tools > Reports** menu.

or

- ▶ Export the casebook as a tab-separated text file in tabular form either from the menus (**Tools > Casebook > Export Casebook**) or using **RMB > Export Casebook** from an open display.
- ▶ Open Excel and **Open** the saved text file (you will need to look for All Files or Text Files to see it). When it comes up with the Import Wizard, just click **Finish**.

or

Open Word and **Insert > File**, then select the imported data and do a text to table conversion, with tabs (Table menu).

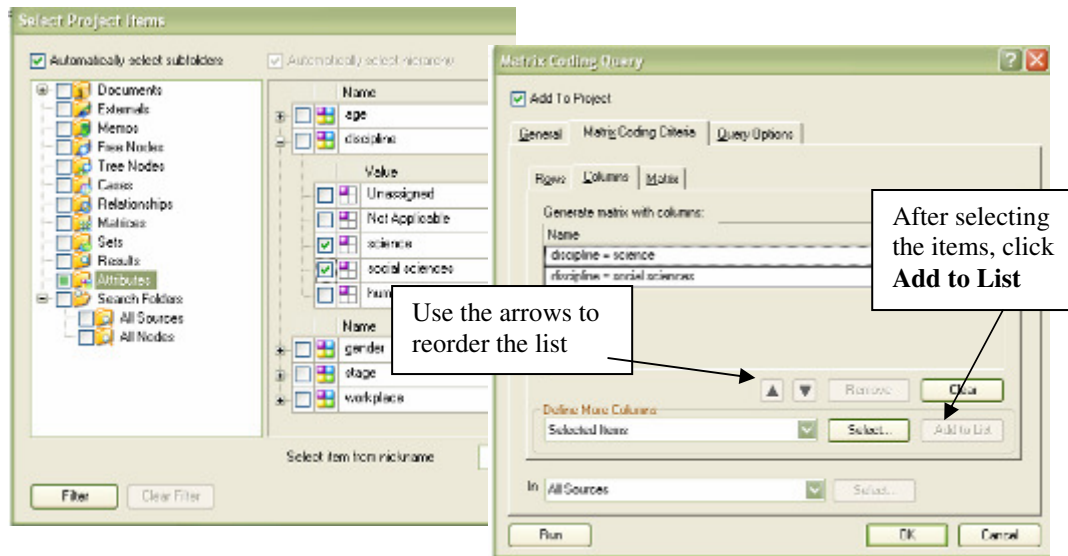
- ✓ If you export a table from NVivo to SPSS, you will need to open the table and enter a value in the first cell (e.g. using Notepad) otherwise SPSS won't import the table.

Using attribute values in a matrix query (to compare across values)

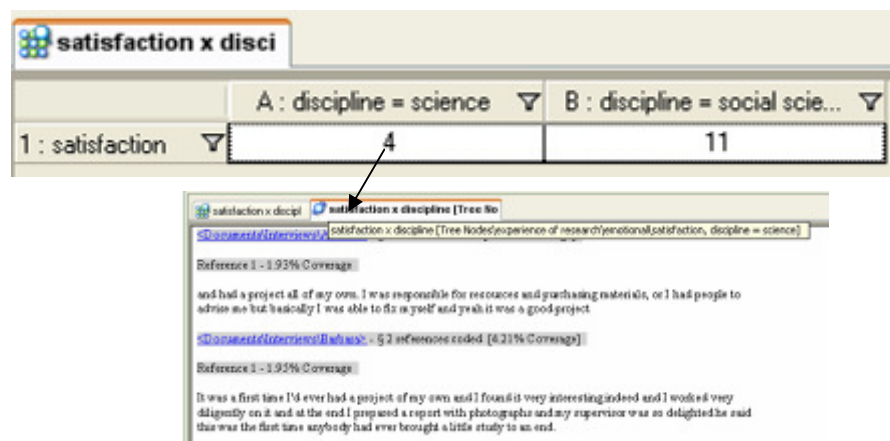
- ▶ Open **Queries** in the Navigation View, and right-click in the List View, to make a **New Query > Matrix Coding**.
- ▶ To save the query for later re-use, check **Add to Project** and provide a name for the query.
- ▶ Open the **Matrix Coding Criteria** tab. For **Rows**, under **Define More Rows > Selected Items > Select**. In the left pane, click on the label (*not* the check boxes) to choose **Free** or **Tree Nodes**, then choose the nodes you want to include in your query by placing a check mark against them in the right pane. (You can select an entire

subtree by first checking **Automatically select hierarchy** at the top of the dialogue.) After clicking **OK** in the selection dialogue, you will then need to click on **Add to List** in the matrix dialogue. (Rearrange their order using the up and down arrows if you wish, and remove any you didn't intend to select.)

- ▶ For **Columns**, under **Define More Columns > Selected Items > Select > Attributes**, check against the attribute *values* you want to include in your query, then **OK** and **Add to List**.



- ▶ The **Matrix** tab is set to **Search for content of rows AND of columns**, which is what you want. This means that for any particular cell, it is looking to find text that matches both the node for that row **AND** the attribute value for that column.
- ▶ Finally, if you want to save the results of your query as a node, you need to turn to **Query Options** and provide a name for the results node.
- ▶ To both save and run your query, click on **Run** at the base of the dialogue. Clicking **OK** will just save the query, ready for you to run when you wish (right click on the saved query and choose **Run Query**).
- ▶ The matrix table will open in the Detail View. Open any cell to see its text by double-clicking. Use the icons on the grid toolbar (which will have become active) or your **RMB** to change which counts are displayed, or to show shading.



Reporting your matrix

- › Directly print the matrix table by going to **File > Print**.

or

- › Export the matrix table to Excel or Word: **RMB > Export Result**, and save in your preferred format (.xls or .txt). If you save as text, open Word and then Open or Insert the saved file, select it, and do a text to table conversion using tabs (Table menu).
- › To print out the text in the table: First you will need to Copy or Cut the matrix results node and Paste it as a Tree Node. Then, select all the (third level) child nodes (use Ctrl+Click), and choose to Print or Export. Make sure you select the option to include the **hierarchical name** for each node in the output.
- ✓ If you export text, then open a Word document, choose Insert > File, and select all the files that were output (at once). Use Replace to replace **Name:** with Name in a heading style so you can use document map or outline view to order your reading.
- ✓ My rule is to *not* print reams of results from any analysis program, but to work through them on screen first, and then be selective. In NVivo, I often find I want to explore context or to modify the text or the coding while I'm reading it, and I can't do that from a printed copy. Also, from long experience, I have learned it is best to deal with (i.e., write up) results as soon as they are generated—and printing them off, apart from using up the world's resources, is a really good way of putting off actually doing anything with them!

Find

The Find toolbar is located immediately above List View, regardless of which Navigation View you are in. The kinds of things you can look for are parts or all of names of sources, nodes, sets, models—any item that is in your project. If you're not sure which tree a node is in, for example, you can Search in > Nodes, and a shortcut to any matching items will appear in List View.

Filtering cases with Find

- › In the **Find** bar at the top of List View, go to **Options > Advanced Find**.

If you are filtering on one attribute only:

- › Go to the **Intermediate** tab. Choose to **Look for: Cases**. Check against **Cases where** (last option), and then use the drop down lists on each of the three slots to identify which attribute values you wish to filter on, and in what way. Click on **Find Now** and cases that match the criterion will be shown in List View as aliases.

To filter on more than one attribute at the same time:

- › Go to the **Advanced** tab. Choose to **Look for: Cases**. In the slot under **Interaction**, choose the attribute to use for setting the first criterion; in the slot under **Option** choose how you want to use it; and in the slot under **Value** choose the value/s you are including in this first criterion. When you've got it right, click **Add to List**. Repeat this process for each criterion you wish to apply.
- ✓ If you want to use these items to scope a query, or store them for some other purpose, highlight one item, then **Edit > Select All**, and **RMB > Create As > Create as Set**.

Using Grouped Find to identify nodes coding a case or document

- ▶ Go to **Options > Grouped Find**, ask for **Items Coding**, and select either the document or case as the **Scope** item and Free and Tree Nodes as the **Range** items.
 - ✓ If you want to use these items in a case-based model, or store them for some other purpose, highlight one item, then **Edit > Select All**, and **RMB > Create As > Create as Set**.

Coding queries

This query is for when you want to find text that is coded by each of two (or more) nodes (AND), *or* text coded at multiple nodes (OR), *or* at one node AND NOT another, *or* text coded by a node when it is NEAR another:

- ▶ Select Queries in the Navigation View, then right-click in the List View to create a **New Query**. You want to create a **Coding** query.
- ▶ To save your query, check next to **Add to Project**, and provide a name for the query.
- ▶ Return to **Coding Criteria**, and select the **Advanced** tab. Don't be put off by the sound of 'advanced'—it just means you're going to be using more than one node!
- ▶ Select a node or nodes to add to the query by clicking on the **Select** button. You will be shown a list of your nodes. Once you have found and highlighted the node/s you want to use, click **OK** (or press Enter on your keyboard). To complete the selection, you now need to click on **Add to List**. The node/s will be entered into the query dialogue.
- ▶ To find a union, difference or proximity (OR, AND NOT, NEAR), select only one node, define how you want it to relate to the second node (NEAR also requires you to specify how near), and then select a second node.
- ▶ Now check the **Query Options** tab. You will find the query is set to show a **Preview Only**, which is probably all you need for the present.
- ▶ Click on **Run** at the base of the dialogue. This will both save the query (if you elected to do that) and run it. (Clicking OK will simply save it.) The results of your query will open in Detail View. If you decide, on viewing the results, that you want to keep them after all, you can right-click and choose to **Store Query Results**.
- ✓ For further information, check out **About Queries**, and **Advanced Coding Queries** in **Help**.
- ✓ NEAR options are *not* good options for focus group data!
- ✓ Use a matrix coding query if you want to look at multiple relationships between nodes at the same time, e.g., to review a range of responses to a set of events.

Analysing cases

Any query can be set up to run within a single case (or a group of selected cases).

- ▶ At the base of the query dialogue, choose **In > Items in Selected Folders**. Select **Cases**, and then in the right side of the selection sub-dialogue, check against the case(s) you plan to use.

Cross-case analysis

- ▶ Comparing cases is similar (in computing principles) to comparing attribute values. This time, however, set up your **Matrix Coding Query**, with the required cases in the **Rows**, and free or tree nodes or other items of interest defining the **Columns**. As with the attribute matrix query, you will search for content of rows **AND** of columns. This will find the text for each specified item (e.g., node or set) separately for each included case, and display it in table format, allowing you to compare across cases.
- ▶ You might refine your query by scoping to a particular folder or set of documents, for example, to compare cases on a range of factors at the beginning (Time 1) of the study or intervention. In this case, you would set up your query with cases in the rows, nodes in the columns, and scope to the folder of Time 1 documents.
- ▶ If you want to refine your analysis by comparing what has been said or what happens at different time phases in the life of an organization, or through repeated interviews with the same participants, then you will need first to create a *set* of documents for each time period or wave of interviewing (highlight and **RMB > Create Set**). Then, you will be able to use the time-based sets to identify the columns in a matrix (with cases still in the rows), and by scoping the query to a particular node (**In > Selected Items > Select [Node]**) you will have a comparison of how each case progressed over time for that particular issue/topic.
- ✓ If each of your cases can be represented by a single whole document, the query will run faster if you use documents instead of case nodes to define the rows.

Scoping a query

—with document folders

- ▶ In any query dialogue, at the base of the dialogue is an option to run the query **In** – All Sources, Selected Items, or Items in Selected Folders. Choose **Items in Selected Folders**.
- ▶ The **Select** button will become active – click on this to be able to choose which folders you want included in the search process.

—with sets or nodes

- ▶ NVivo queries view sets as a single item, and so the process of choosing a set involves choosing to run the query **In a Selected Item**, rather than in items in a selected folder.

Text search

- ▶ Navigate to Queries, and with Queries showing in List View, choose to create a **New Query > Text Search**. Decide whether or not to **Add to project** so you can either re-run or modify and re-run the search (probably a good idea to do so, unless you know exactly how to specify what you want to find).
- ▶ Type the word or phrase you wish to search for into the dialogue, on the **Text Search Criteria** tab. If you want an exact phrase, enclose it in double quotation marks. If you are using just the root of a word rather than a whole word (so you find variations on it), add an asterisk (*) to the end of what you type, otherwise it is likely not to find anything at all.

- ▶ Choose whether you wish to search in **Text** or in **Text and Annotations**, and then whether to search **All Sources**, or to limit your search.
 - ▶ Under the **Query Options** tab, choose to **Create Results as New Node**, and **Name** the node. The default location is the **Results** folder, and this is quite appropriate.
 - ▶ Indicate whether you want to **Spread** the finds from the search.
 - ▶ Select **Run** from the base of the dialogue. This will both save the query (if that is what you selected) and run it. The results of the query will open in Detail View. (If you accidentally hit **OK**, just locate the query and **RMB > Run Query**.)
 - ▶ To see the found text in context, **Edit > Select All (Ctrl+A)**, then **RMB > Coding Context > Broad**. If you want to save any of the found text (and context), then select and code it in the normal way. Once you have coded a passage, the relevant node will remain selected for further coding.
 - ✓ Text search will not find part words, symbols or punctuation—for these you will need to use **Edit > Find** within particular sources or nodes.
 - ✓ Stop words (see list in Help under Text Search: Special Characters and Operators) are not included in a text search or Word Frequency Count. These include such English words as ‘a’ and ‘the’, thus preventing text queries looking to compare use, say, of ‘the baby’ compared to ‘my baby’. To overcome this, change the Index Language option to 'None' at either Application level (Tools > Options) for all future projects, or Project level (File > Project Properties) for a current project:
 - ✓ Always treat the node with the results of a text search as a temporary holding area only; once you have coded relevant text on to a more permanent location, delete the temporary node.
- ! Never send the results of a text search into an existing node unless you know exactly what the search is going to find, and you are sure you want all of it in that node.**

Refining text searches

Check **Help > Text Search: Special Characters and Operators** to find a detailed explanation of various wildcards and other ways of making your text searching more (or less) specific with

- ▶ wildcards to replace one or more than one character in words;
- ▶ Boolean terms (AND, OR, NOT) to specify particular combinations of words within each document; or
- ▶ using fuzzy (vague) or proximity (NEAR) operators. (Note: the proximity operator requires that the two words are enclosed in double quotation marks.)

Combine text search with other queries, either to make your search more specific, or to ask questions involving the use of language.

The **Compound Query** tool provides for the combination of either two separate text searches or a text search with a coding query, using an AND, OR, AND NOT or NEAR operator to link the two separately specified queries.

- ▶ Use the Text Search Query subqueries in Compound Query to find words or phrases which occur NEAR each other (Options: **in the same paragraph**)—thus using the more natural context of the paragraph rather than the context provided by a rigid word count;

- ▶ Use **Compound Query** to check the thoroughness of your coding by searching for a keyword or phrase, less what you have already coded. Specify the text search first (**Text Search Query**), then AND NOT the node/s (**Coding Query** – Simple or Advanced) you have been using for coding. The benefit of doing this is that you can remove all known (coded) finds from the results before ‘cleaning up’ what the text search might locate.

Use the results from a text search in another type of search by using the node containing the results as an item in the search, rather than the text pattern itself.

- ▶ Compare usage of words in different contexts or by different groups by using one or more text search results nodes in the **Rows** of a **Matrix Query**, with contextual nodes or attribute values in the **Columns**.

Creating a model

(cf. **Help > models and model groups**)

- ▶ Click on **Models** in the Navigation Pane, then create and name a new model using the RMB menu in List View. An area for working will be created in Detail View.
- ▶ Build with new items: drag a shape onto the model area. Double-click to name it.
- ▶ If you already have nodes or other project items, from the RMB menu, choose to **Add Project Items**. You will be asked if you want to add associated items (if you don’t want to, simply click OK).

For example, if you are modeling a case, then choose to add the **document** you have been coding, and **Add Associated Items > Items coding** (then delete the document from the model).

- ▶ Items can be resized, or the shape can be extended in one or other direction.
- ▶ Move the shapes to where you want them, by dragging. Multiple selections can be moved at the same time so that their spatial relationships are preserved.
- ▶ Add connectors to show links between shapes or nodes. Select the first item for the linked pair. Use Ctrl-click to select the second item. While hovering over one of the items, from the RMB, choose **Add Connector**, and choose the type of connector that best describes the relationship between the two items. If you create a one-way arrow that is pointing the wrong way, select it, hover and use **RMB > Reverse Direction** to fix it.
- ✓ To create more working space, select **Window > Docked** and the Detail View will become a separate window which can be enlarged to fill the screen.
- ✓ When you’re working in a model, if you don’t need them, go to the View menu (in either the main view or the undocked window) and turn off the Model Shapes palette (you can access these at any time from the RMB) and the Model Groups. This gives you a lot more room for working in.
- ✓ Zoom down (say, to 75%) to see more model in the space available (View menu).


Modify the appearance of model items

- ▶ Adjust font type and size, fill and line colours for a selected item (or use Ctrl-Click to select a number of items) using the **Format** menu or toolbar. You can adjust the size, font, or colour of multiple model items at the same time. Select those you want to



change (drag to select; use Ctrl-A for all; or Ctrl-Click for some), and then adjust one. The adjustment will apply to all selected items.

- ▶ Enhance your model's power to explain and communicate by applying *styles* to the node shapes or connectors within it (these work on the same principles as paragraph styles). These can be set up for this project through **File > Project Properties > Model Styles**, or for the application as a whole (i.e. for all future projects) through **Tools > Options > Model Styles**.
- ✓ Change the default item style (via File > Project Properties > Model Styles) to 8 point font size and maybe also to Arial Narrow font (or another small one).

To archive the model

- ▶ In the Detail View, **RMB > Create As Static Model**. You will be asked to name the new model—this is the one which will be the archive (static) copy, indicated by a different icon . Being static means it is unable to be changed, and it will lose any live links with project items.

Creating custom groups in a model

- ▶ At the right of the model window, under **Custom Groups**, select **RMB > New Group**. Name the group, and optionally provide a description.
- ▶ To populate the group, select an item or multiple items in your model, then click in the check box under . The same item can belong to multiple groups. Remove an item by selecting it then clicking to remove the check mark.
- ▶ To show or hide a group of items in the model, click on the check box under .
- ✓ Custom groups are model specific. If you make a new model, even if it is in the same project, you need to re-create the groups. Styles, in contrast, are available to apply to items or links in all models in a project (or in all projects in NVivo if they were set up through application options prior to creating the project).
- ✓ The **Help** files contain a very full description of the operation of model groups in a project—search for **model groups** if you need further assistance.

Charting your data


NVivo offers a range of charting possibilities – from simple pie charts based on (demographic) attributes and bar charts showing the top 20 nodes in a document, to more complex 3D charts based on matrix results or other combinations of nodes and attributes.

Charting frequencies direct from List View

- ▶ To chart the top 20 nodes occurring in a *source* (based on proportion of the document coded at each node): Select document in List View, **RMB > Chart Document Coding**.
- ▶ To chart the top 20 documents coded by a particular *node* (based on proportion of each document coded at the node): Select the node in List View, **RMB > Chart Tree Node Coding**.


Using the Charts wizard

To display demographic (or other attribute) information

- ▶ From the Tools menu, choose **Charts...** (or select  from the View toolbar)
- ▶ Select **Cases by attribute value for an attribute** (or for two attributes).
- ▶ In the Chart Wizard, select the attribute/s you want to display.
- ▶ Indicate which attribute values you want displayed (normally **All attribute values except 'Unassigned', 'Not Applicable'**).
- ▶ Choose the type of chart you want. (Use Pie for a single attribute; try 3-Axes Column or Grouped Column for two attributes.)

To view the distribution of coding across sample sub-groups (attribute values)


! Charting nodes by an attribute value is potentially useful but is also dangerously subject to misinterpretation (see below).

- ▶ From the Tools menu, choose **Charts...** (or select  from the View toolbar)
- ▶ Select **Coding by attribute value for node** (or **nodes**).
- ▶ In the Chart Wizard, select the **node** or nodes you want to chart, and the **attribute** you want them sorted by,
- ▶ Indicate which attribute values you want displayed (normally **All attribute values except 'Unassigned', 'Not Applicable'**).
- ▶ Select the information you want displayed for each attribute value (Y-axis), i.e. **Percentage coverage, Number of coding references, or Number of cases coded.**
- ▶ Choose the type of chart display you want to use (bar, column, etc.).
- ✓ Two dimensional (2D) charts are less 'jazzy' but can be much easier to interpret than 3D.

! Be careful about interpreting numbers of coding references or cases in these displays: the values are absolute and so they *do not* take into account variations in the number of cases you have with each attribute, i.e., there will appear to be more coding for members of larger groups.

! Percentage coverage is particularly misleading. This displays how the coding done at the node is distributed across each attribute value (or combination of attribute values for charts with two attributes). (It does *not* show, as one would expect, the proportion of text with that attribute that is coded at that node.)

Charting a matrix result

- ▶ From the Tools menu, choose **Charts...** (or select  from the View toolbar)
- ▶ Select **Matrix**, then, **Select** the matrix result you want to display (this has to be a saved result in either the Results area (under Queries) or the Matrices area (under Nodes)).
- ▶ Select the display options and display type best suited for the type of matrix you are using.

! Charts based on matrix results involving attributes are not adjusted for differing numbers having each attribute value and so can give a false impression of the distribution of responses across groups.

Copying and exporting charts

Charts are not directly saved within NVivo, but they can be copied and pasted into Office (or similar) applications, or they can be exported as picture files. If the copied chart is pasted as an Internal (in the List View) it will be saved as an Image source.

Teamwork tools

NV8 provides added tools to combine and track the contribution of different team members to a project, and to provide for coding comparisons as a way of facilitating common approaches across a team. (cf. **Help > teamwork** and related topics).

Defining User Profiles

When NV8 is launched for the first time, the NVivo user dialogue requests a name and initials. These will become the default user on that computer.

- If multiple users are accessing the same copy of NVivo, from **Tools > Options > General**, check the box next to **Prompt for user on launch**.
- To change or add a user while the program is running, in **Tools > Options > General**, provide the requested **User** details (can be either existing or new).
- ✓ Any items created or modified will be identified in List View by user initials.
- ✓ Users can be identified in coding stripes (View > Coding Stripes > Selected Items > Users).
- ✓ Node content displays can be filtered by user (View > Coding by Users > Selected Users).

Importing a project

- There are additional options in NV8 regarding what items are imported as part of a project (check **File > Import Project**).

Comparing coding

Two **measures of agreement** between coders are provided in NV8:

- *Percentage agreement* is calculated from the number of units (usually characters) for which two coders (or groups of coders) are in agreement (including both presence and absence of coding for the particular node), compared to the total number of available units.
- The *Kappa coefficient* is a statistical measure of the level of agreement between two coders which takes into account the amount of random (chance) agreement which could be expected to occur. **In NVivo, this coefficient is calculated at a very fine level (e.g. characters), and is therefore likely to produce lower estimates of agreement than might otherwise be expected.**
- Navigate to **Queries > New Query** (in List View) > **Coding Comparison Query**.
- Select the **Users** (or User groups) to be compared, the **Nodes** they are to be compared on (e.g., Tree Nodes), and the **Sources** to be compared. Options for **Display** (Display Kappa Coefficient and Display percentage agreement) are checked already.

Results of the coding comparison are presented for each node used in each source, in table format in Detail View.

Result columns include:

- *Source size* – total number of units in the source being coded (characters for documents, duration to 1/10th of a second for media files, pixels for images).
- *Kappa* – 1 indicates perfect agreement (identical coding), 0 or less indicates no better than chance.
- *Agreement (%)* – overall level of agreement between coders (a combination of the next two columns).
- *A and B (%)* – the percent of units coded by both coders.
- *Not A and Not B (%)* – the percent of units coded by neither coder.
- *Disagreement (%)* – overall level of disagreement between coders (a combination of the next two columns).
- *A and Not B (%)* – percent of units coded by A but not coded by B.
- *B and Not A (%)* – percent of units coded by B but not coded by A.

To view details, e.g. of a problem area:

- › Double-click any line of the results, to be shown the particular source with coding stripes detailing coding for that particular node, as assigned by each user.
- ✓ Use this display as the basis for team discussion about what ‘should’ be coded at this node.

! Don't forget to make a back up copy of your project after each day's work!!