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# NVivo “Basic How-to” for Mac Users

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## 1. Software screenshot

Screenshot of NVivo after adding a few sources and double clicking on one of the internals to view details

The screenshot displays the NVivo software interface on a Mac. The top menu bar includes Home, Create, Data, Analyze, Query, Explore, Layout, and View. Below the menu is a toolbar with icons for Text Search, Word Frequency, Coding, Matrix Coding, Coding Comparison, Last Run Query, Add to Stop Words List, Run Query, Store Query Results, and Other Actions. The main interface is divided into three panes. The left pane, labeled 'Navigation View', shows a tree structure of sources and nodes. The middle pane, labeled 'List View', displays a list of sources under the 'Internals' category, including 'Barbara', 'Barrier island developed', 'Carteret Local Food Netw...', 'Crossroads marks 30 years', 'Fishermen spread shells t...', 'Helen', 'Karen Beasley Sea Turtle...', 'North Carolina Commerci...', 'North Carolina Sea Turtle...', 'Sharing in the sea's boun...', 'Survey Responses2', 'Taras Grescoe ~ Bottom...', 'The Effects of Artificial B...', 'The Risk of Renourishment', 'The state's sea level retre...', 'Tiny shrimp leave giant c...', and 'Walking Fish - A Commu...'. The right pane, labeled 'Detail View', shows the content of the selected source 'Barbara'. It includes an interview transcript with Henry and Barbara, discussing their connection to Down East and their lives there. The bottom status bar shows the current view: SOURCES > Internals > Barbara.

**Navigation View**

**List View**

**Detail View**

Interview with Barbara on February 19<sup>th</sup>, 2009 at her home in Bettie, North Carolina. Barbara writes cooking curriculum materials and does earth science environmental consulting work for soil scientists.

**Q.1. Connection to Down East**

**Henry**  
*Tell me about your personal and family history in Down East. How long have you or your family been living Down East full time or part time?*

**Barbara**  
My family moved here when I was two years old in 1969. My parents still live here. They live down in Gloucester. But I was raised in Beaufort, in town, and went to Beaufort Elementary and middle school and high school, then moved away for college. So I've lived here most of my life although I've moved away.

**Henry**  
*And you've lived Down East how long?*

**Barbara**  
Since '96. My husband and I bought this little cottage in '96.

**Henry**  
*And have you lived here full time since then or is it a part time – seasonal?*

**Barbara**  
It's part time. It was full time, but then in 2000 he got a job up North. And so since then we've been here on a very sporadic schedule. Sometimes full time but not always, because of my work down here – I was doing some environmental fieldwork down here that's kept me down here while he was up there.

**Henry**

SOURCES > Internals > Barbara

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## 2. NVivo Tabs overview

In the Ribbon from left to right at the top of your window)

- ❖ **Home:** open or edit items; cut and paste; format text; select PDF regions
- ❖ **Create:** Create new sources (documents, external proxies, memos, audio-visual media), new nodes, and new classifications
- ❖ **Data:** Import projects; import sources; import data from social media (through NCapture); export data to lists or classification sheets
- ❖ **Analyze:** Code and uncode; create links
- ❖ **Query:** Run basic queries: text search, word frequency, or coding queries
- ❖ **Explore:** Generate source and node classification sheets
- ❖ **Layout:** Sort and filter the List View or classification sheets; reset customizations to classification sheets
- ❖ **View:** Close all open project items; see more detail in Detail View; set how to visualize codes; access detail views of nodes and classifications

Also, in the Menu bar above the ribbon, to the left of ‘Create’:

- ❖ **NVivo:** Set basic NVivo preferences; quit NVivo
- ❖ **File:** Create a new project; open a project; save your project; set some project properties; create a copy of your project; print your project; close your project
- ❖ **Edit:** Cut, past and copy (as in Home tab); format fonts or texts; find; use special characters

Also, in the Menu bar above the ribbon, to the right of ‘View’

- ❖ **Window:** Minimize the window; zoom; switch between projects
- ❖ **Help:** Get help

## 3. Adding Materials to your Project

### Creating a new Folder

- CTRL-click on the folder (e.g., in **Sources**, ‘Internals’, ‘Externals’, or ‘Memos’) where you’d like to create the new folder

OR

- Go to the **Create** tab
- Select ‘Folder’ from the menu which comes up

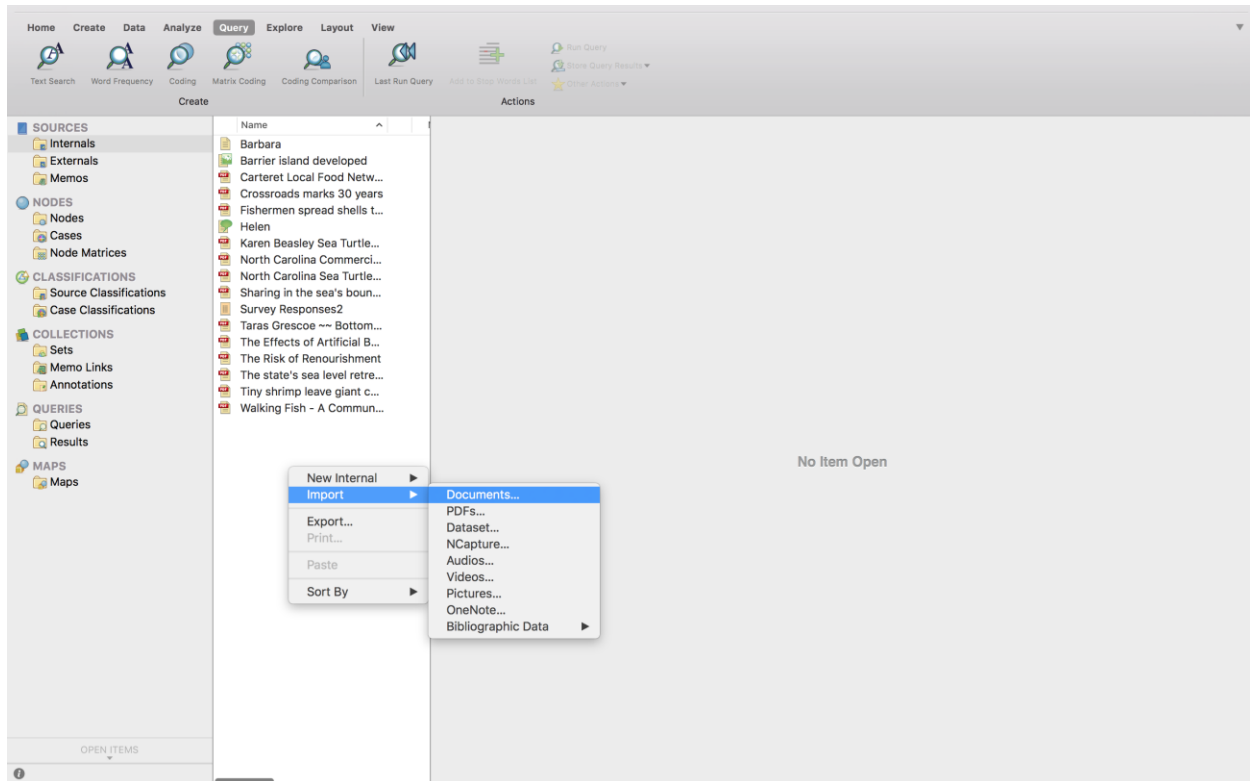
### Importing to the Internals Folder

- In the **Navigation Pane for Sources**, select the folder in which the document or memo is to be created
- CTRL-click on the white area in the **List view** of the folder into which the source should be imported

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- On the menu which pops up, select ‘Import’
- Select the type of file which you would like to import



OR

- Go to the **Data** tab
- In the ‘Import’ area, select the type of file which you’d like to import

### Creating a new Internal document or Memo

- In the **Navigation Pane for Sources**, select the folder in which the document or memo is to be created. For Memos, this will likely be the ‘Memos’ folder
- CTRL-click on the white area in the **List View** of the folder.
- Select ‘New Internal’ or ‘New Memo’ from the menu which pops up
- If you are creating an Internal item, select whether you would like to create a Document, Audio, or Video.
- In the ‘Properties’ dialogue box which opens, type in a name and description for the document, and set Attribute values.

OR

- Go to the **Create** tab
- In the ‘Sources’ area, select the type of document or memo you would like to create.

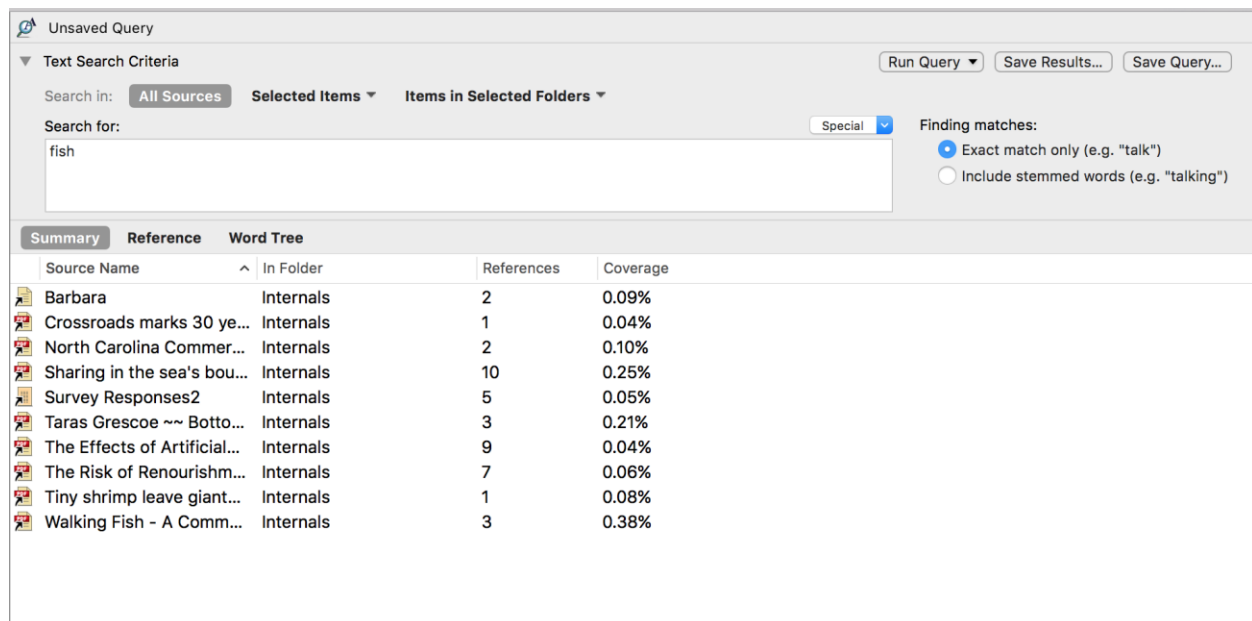
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### 4. Running a Text Search Query

- In the **Query** Tab, click on the **Text Search** button
- In the window which pops up,
  - Use the drop-down menus in the ‘Search in:’ line to indicate which sources you want to query (all sources, selected sources only, or selected folders only)
  - Under ‘Finding matches’, indicate whether you want to search only for exact matches or for stemmed words (e.g., ‘talking’ and ‘talked’ as well as just ‘talk’) as well
  - Use the box to indicate the word(s) you’re looking for
  - Use the ‘Special’ drop-down menu if you’d like to include wildcard characters, perform a Boolean search, or search for fuzzy or near matches
- Click ‘Run’ to begin your query
- After you ran the query, you can save the results separately and/or activate the ‘Add to Project’ button in the top-right corner if you want the resulting query to be added to your project

P.S. Note on view: By default, the Query tab pops up at the bottom of the screen constraining the query results view (especially important for visualization), you might want to go to the main Tab ‘View’ and change the detail view from bottom to right.



Source Name	In Folder	References	Coverage
Barbara	Internals	2	0.09%
Crossroads marks 30 ye...	Internals	1	0.04%
North Carolina Commer...	Internals	2	0.10%
Sharing in the sea's bou...	Internals	10	0.25%
Survey Responses2	Internals	5	0.05%
Taras Grescoe ~~~ Botto...	Internals	3	0.21%
The Effects of Artificial...	Internals	9	0.04%
The Risk of Renourishm...	Internals	7	0.06%
Tiny shrimp leave giant...	Internals	1	0.08%
Walking Fish - A Comm...	Internals	3	0.38%

### Visualizing Text Search Queries

The results of a Text Search Query can be displayed in three ways:

- A **Summary**, which shows you the number of references to the text you searched for in each source
- A **Reference** list, which lists all the references in the sources
- A **Word Tree**, which puts the text you searched for in the centre of a graphic, and all of the preceding and following contexts on either side.

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### 5. Running a Word Frequency Query

- In the **Query** Tab, click on the **Word Frequency** button
- Use the drop-down menus in the ‘Search in:’ line to indicate which sources you want to query (all sources, selected sources only, or selected folders only)
- Next to ‘Finding matches’, indicate whether you want to search only for exact matches or for stemmed words (e.g., ‘talking’ and ‘talked’ as well as just ‘talk’) as well
- Next to ‘Display words:’ to indicate whether you want all words to be displayed or only a certain number of words (e.g., the 100 most frequent, the 1000 most frequent)
- Use the box to indicate the minimum length of word you’re looking for (default is 3 characters)
- Click ‘Run’ to begin your query

Unsaved Query

Word Frequency Criteria Run Query Save Query...

Search in: **All Sources** **Selected Items** **Items in Selected Folders**

Finding matches: ☐ Exact match only (e.g. "talk") ☒ Include stemmed words (e.g. "talking")

Display words: ☐ All ☒ 30 most frequent

With minimum length: 3

**Summary** **Word Cloud**

Word	Length	Count	Weighted Percentage	Similar Words
nests	5	300	1.64%	nest, nested, nesting, nests
beach	5	289	1.58%	beach, beaches
turtle	6	255	1.39%	turtle, turtles, turtles'
sea	3	147	0.80%	sea
area	4	111	0.61%	area, areas
project	7	109	0.60%	project, projecting, projections, projects
loggerhead	10	105	0.57%	loggerhead, loggerheads
success	7	87	0.48%	success, successful, successfully
waters	6	78	0.43%	water, waters
2002	4	77	0.42%	2002
green	5	77	0.42%	green
sand	4	73	0.40%	sand, sands
fish	4	65	0.36%	fish, fished, fishing
season	6	65	0.36%	season, seasonal, seasons
marine	6	63	0.34%	marine, mariners
good	4	63	0.34%	good
rising	6	62	0.34%	rise, rises, rising
nonnourished	12	55	0.30%	nonnourished
states	6	54	0.30%	state, stated, states, states'
local	5	53	0.29%	local, locally, locals
island	6	52	0.28%	island, islands

### Visualizing Word Frequency Queries

Once you have run a word frequency query, you have two options for how to display the results, which you can choose using the buttons above the results.

- A **Summary**, which lists the words in order of frequency.
- A **Word Cloud**, which creates a picture and displays more frequent words as being more prominent

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## 6. Using Nodes

### Creating a new Node

- In any view, you can click on the **Create** Tab, then click on the ‘Node’ button

OR

- In the **Nodes List view**, CTRL-click anywhere in the window, and select ‘New Top Level Node’ in the menu which pops up

OR

- Create a new Node while you’re coding (see Coding section below)

### Node Summary View

The screenshot shows the NVivo interface with the 'Fishing' node selected in the Nodes list. The Summary tab is active, displaying a table of references and their coverage.

Source Name	In Folder	References	Coverage
Sharing in the sea's bou...	Internals	10	3.08%
The Effects of Artificial...	Internals	9	0.04%
The Risk of Renourishm...	Internals	7	0.06%
Survey Responses2	Internals	5	0.05%
Taras Grescoe ~ Botto...	Internals	3	0.21%
Walking Fish - A Comm...	Internals	3	0.38%
Barbara	Internals	2	0.09%
North Carolina Commer...	Internals	2	0.10%
Tiny shrimp leave giant...	Internals	1	0.08%
Crossroads marks 30 ye...	Internals	1	0.04%

P.S. Note on coverage: Coverage column in the summary view is the percentage of the source covered by the coded references

### Node References View

The screenshot shows the NVivo interface with the 'Fishing' node selected. The Reference tab is active, displaying a list of references with their coverage percentages.

Reference	Coverage
<a href="#">Internals\\Sharing in the sea's bounty - Weigl - NewsObserver.com</a> 10 references coded, 3.08% coverage	
Carolina seafood. He was inspired by Paul Greenberg's book, "Four Fish: The Future of the Last Wild Food," which made him	Reference 1: 0.31% coverage
get-two bags of frozen shrimp or pretty much any fish on sale at the grocery store. Without the ease of	Reference 2: 0.27% coverage
grocery store routine, I would have to seek out local fish at Capital Seafood Market or Earps Seafood Market, the two	Reference 3: 0.28% coverage
	Reference 4: 0.36% coverage

## **7. Coding**

### **Code at a new Node**

- Select the content you want to code
- On the **Analyze** tab, in the **Coding** group, under **Code Selection At**, click **New Node**
- If you have multiple Node folders, you can choose which folder you want to save the new Node in. To choose where you want to store the node, click the arrow beside ‘Location: Nodes’ box, then use the Navigation box which opens up to select where you want the Node to go.
- Enter a name for the Node
- Enter a description of the node (Optional)
- Click **Done**

**OR**

- In Vivo code
  - Select the text content you want to code (up to 256 characters)
  - On the **Analyze** tab, in the **Coding** group, click **Code In Vivo**

### **Code at an existing Node**

- Select the content you want to code
- On the **Analyze** tab, in the **Coding** group, under **Code Selection At**, click **Existing Nodes**, and select the relevant node.

**OR**

- Drag and drop coding
  - Display your nodes in List View
  - Open a source or node in Detail View. You may want to arrange the workspace so that Detail View is beside the node list
  - Select the content you want to code
  - Drag the selected content to the relevant node



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### 8. Keyboard Shortcuts

(note: ⌘ is the Command key. ‘Option’ is also called ‘Alt’.)

Shortcut	Function
<b>Working with Projects</b>	
⌘+N	Create a new project
⌘+O	Open an existing project
⌘+P	Print project item
⌘+SHIFT+E	Export project item
⌘+S	Save the project
⌘+R	Refresh the NVivo work area (Navigation View, List View and Detail View)
⌘+Period (.)	Show the activity pane so that you can cancel a process such as a query
⌘+SHIFT+I	Import a new internal source
<b>Working with Nodes</b>	
Shift+⌘+N	Create a new Node
<b>Coding material and sources</b>	
Option+⌘+3	Code selected content within a file at a new node
Option+⌘+2	Code selected content within a file at an existing node (you will be asked what node you want to code at)
Option+⌘+6	Code a selected source at a new node
Option+⌘+5	Code a selected source at an existing node (you will be asked what node you want to code at)
Option+⌘+9	Code in vivo (selected text will be coded at and used to name a new node)
⌘+SHIFT+2	Uncode selection at existing nodes
⌘+SHIFT+3	Uncode selection at this node
⌘+SHIFT+5	Uncode sources at existing nodes
<b>Working with audio and video</b>	
F8	Play or pause the media player
F7	Skip back
F9	Skip forward

P.S. Note: access the full list of shortcuts at [http://help-nv11mac.qsrinternational.com/desktop/procedures/keyboard\\_shortcuts.htm](http://help-nv11mac.qsrinternational.com/desktop/procedures/keyboard_shortcuts.htm))