

Contents of the handout

1. Software screenshot	1
2. Tabs (in the Ribbon from left to right at the top of your window)	2
3. Adding Materials to your Project	2
Creating a new Folder	2
Importing to the Data Folder	2
Creating a new document	3
4. Running a Text Search Query	4
Visualizing a Text Search Query	5
5. Running a Word Frequency Query	6
Visualizing Word Frequency Queries	7
6. Nodes: Use & Coding	8
Creating a new Node	8
Node Summary View [switch between Summary and References using the tabs on the right]	8
Node References View	9
Coding	9
Code at a new node	9
Code at an existing node	11
7. Keyboard Shortcuts	13

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1. Software screenshot

Screenshot of NVivo 12 after adding a few files and double clicking on one document to view details

Help

The screenshot displays the NVivo 12 Pro interface. The top menu bar includes File, Home, Import, Create, Explore, and Share. The ribbon contains various tool groups: Links (Memo Link, See Also Link), View (Zoom, Annotations, Quick Coding, Layout), Coding (Coding Stripes, Highlight, Code, Code In Vivo, Range Code, Uncode), and Document Tools (New Annotation, Annotations, Word Cloud, Compare With, Explore Diagram, Visualize Document, Query This Document, Find, Edit). The left sidebar shows a tree view with categories like Quick Access, Data, Codes, Cases, Notes, Search, Maps, and Output. The main area is divided into three panes: a 'List View' table of interviews, a 'Detail View' showing the content of a selected document, and a 'Quick Coding Bar' at the bottom. A 'Navigation View' label is placed over the sidebar, a 'List View' label over the interview table, and a 'Detail View' label over the document content. A 'Help' label with an arrow points to the top-right corner of the window. A 'Quick Coding Bar' label with an arrow points to the bottom status bar.

Name	Codes	References
Barbara	43	197
Betty and Paul	13	41
Charles	38	134
Dorothy	39	128
Helen	14	50
Ken	17	56
Margaret	35	78
Maria and Daniel	43	150
Mary and James	42	111
Richard and Patricia	35	101
Robert	31	96
Susan	47	146
Thomas	28	112
William	47	106

Navigation View

List View

Detail View

Quick Coding Bar

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2. Tabs (in the Ribbon from left to right at the top of your window)

- ❖ **File:** Create a new project; save your project; set preferences using ‘Options’; copy your project; preview and print your project; close your project; etc.
- ❖ **Home:** Go to the clipboard; item properties; explore an item; code files; create new classifications; Set up or adjust what you can see in the workspace; dock and undock items in Detail View; organize List View
- ❖ **Import:** Import projects; import data from social media (through NCapture); import files and surveys; import classifications; import bibliography from management software; import notes and email; import reports and codebooks
- ❖ **Create:** Create notes, new codes, new documents, new classifications, new sets, purchase transcripts
- ❖ **Explore:** Run basic queries (text search, word frequency, or coding queries); run complex queries (compound queries, coding comparisons, or group queries); access the Query Wizard; Create charts, Maps and Diagrams
- ❖ **Share:** Generate reports, extracts; Export project items, Copy project; Export items, list and codebook.

3. Adding Materials to your Project

Creating a new Folder

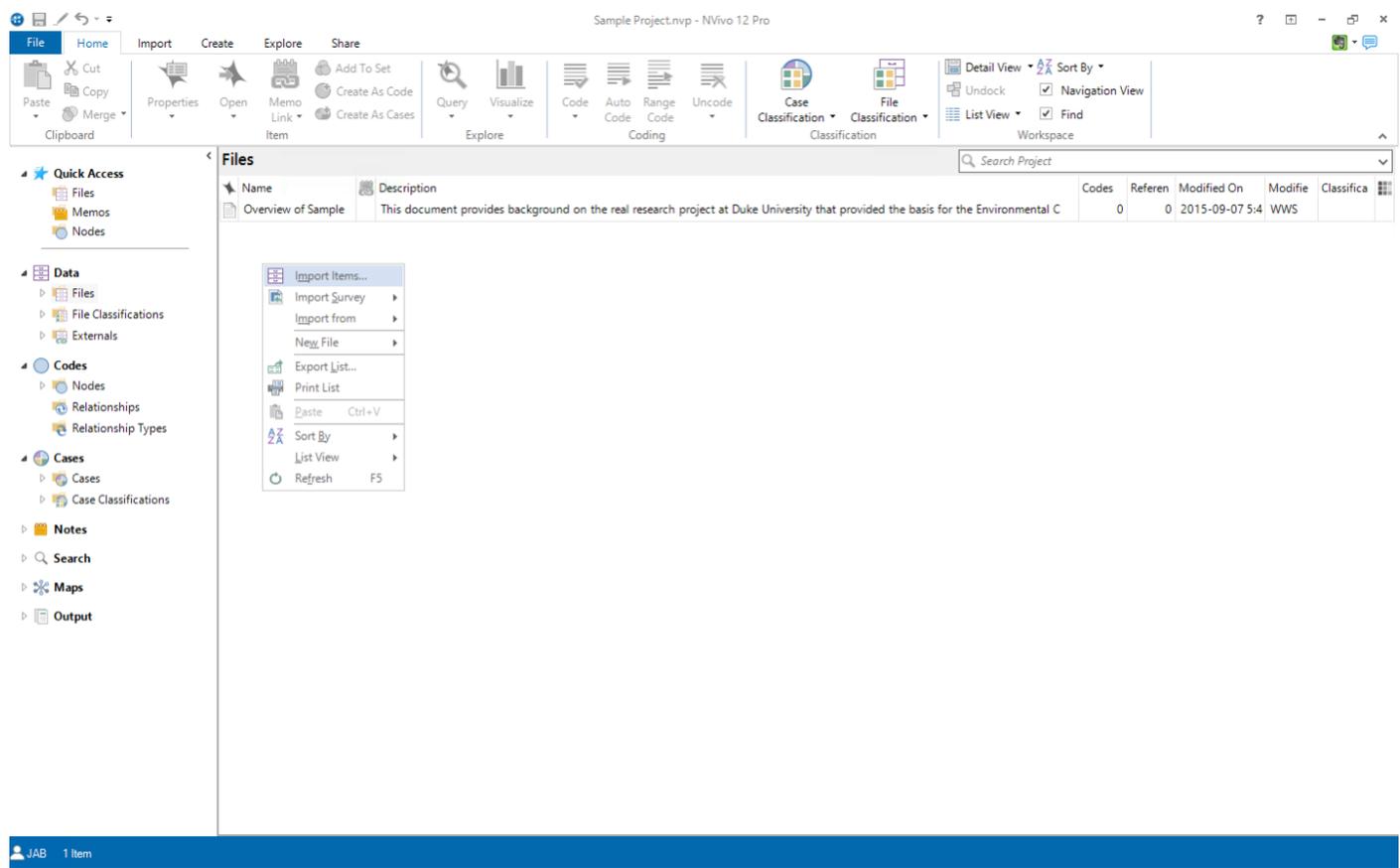
- Right-click on the folder (e.g., in **Data**, ‘Files’ or ‘Externals’) where you’d like to create the new folder

Importing to the Data Folder

- In the **Navigation Pane for Data**, select the folder to which the file is to be imported
- Right-click on the white area in the **List view** of the Files folder, or the folder into which the file should be imported
- On the menu which pops up, select ‘Import items’
- Select the type of file which you would like to import

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OR

- Go to the **Data** tab on the ribbon
- Select the type of file which you'd like to import

OR

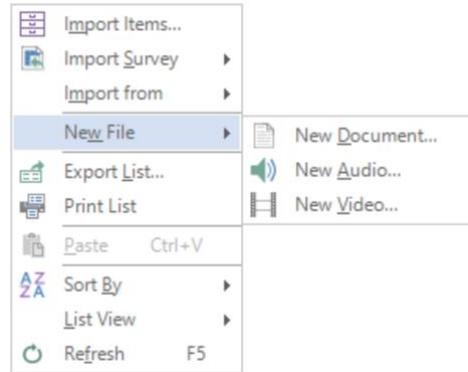
- Open the file folder where you want to import your files
- From your computer folder, where you have your files, **drag and drop** directly into NVivo

Creating a new document

- In the **Navigation Pane for Files**, select the folder in which the document is to be created.
- Right-click on the white area in the **List View** of the folder.
- Select 'New File' from the menu which pops up
- Then select whether you would like to create a Document, Audio, or Video.

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- In the ‘Properties’ dialogue box which opens, type in a name and description for the document, and set Attribute values.

OR

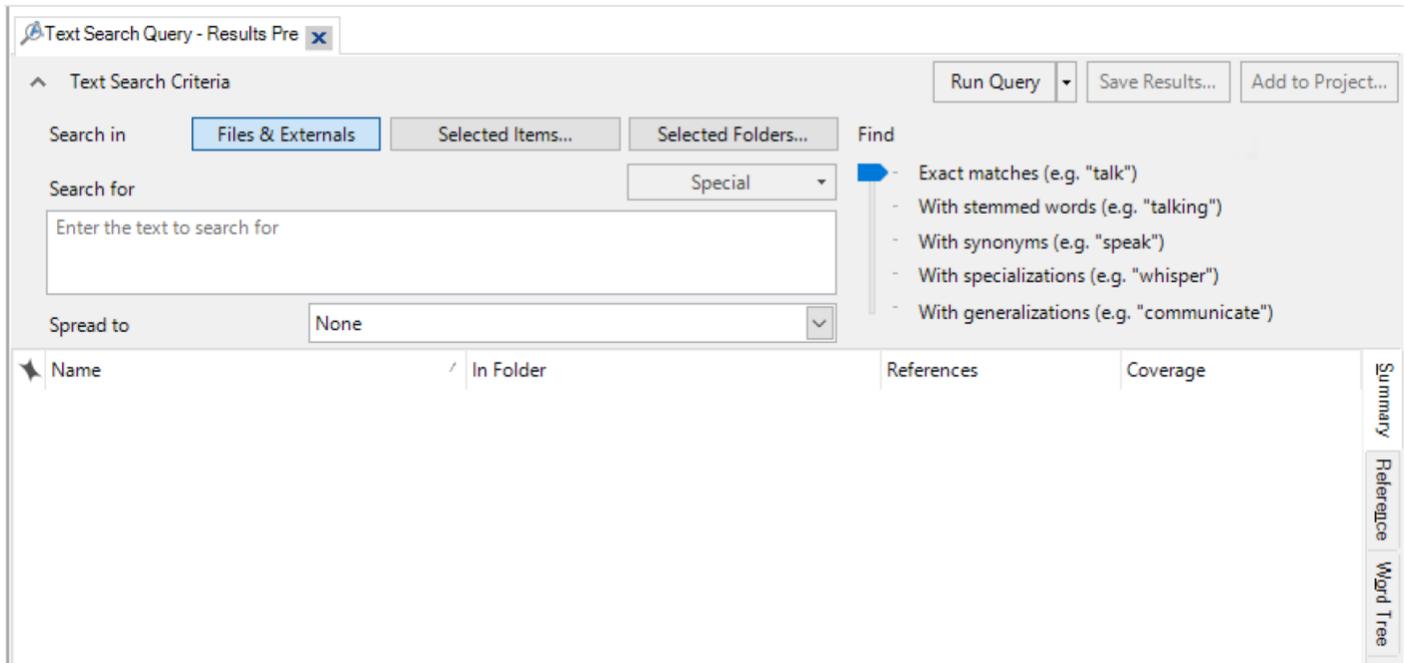
- Go to the **Create** tab
- In the ‘Data’ area, select document or external.

4. Running a Text Search Query

- In the **Explore** Tab, under the query group, click on the **Text Search** button
- In the tab that popped up,
 - Select which files you want to use for the query (files and externals, selected items or selected folders only)
 - Enter the text you want to search for into the box
 - Use the slider to determine how exact you want the matches to be
 - Use the drop-down menu ‘Spread to’ to indicate whether you want to save just the found word in the query results or with context
 - 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 [optional]

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- Click ‘Run Query’ to begin your query (you can also choose ‘Run and Save Results’ if you click the arrow next to ‘Run 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.

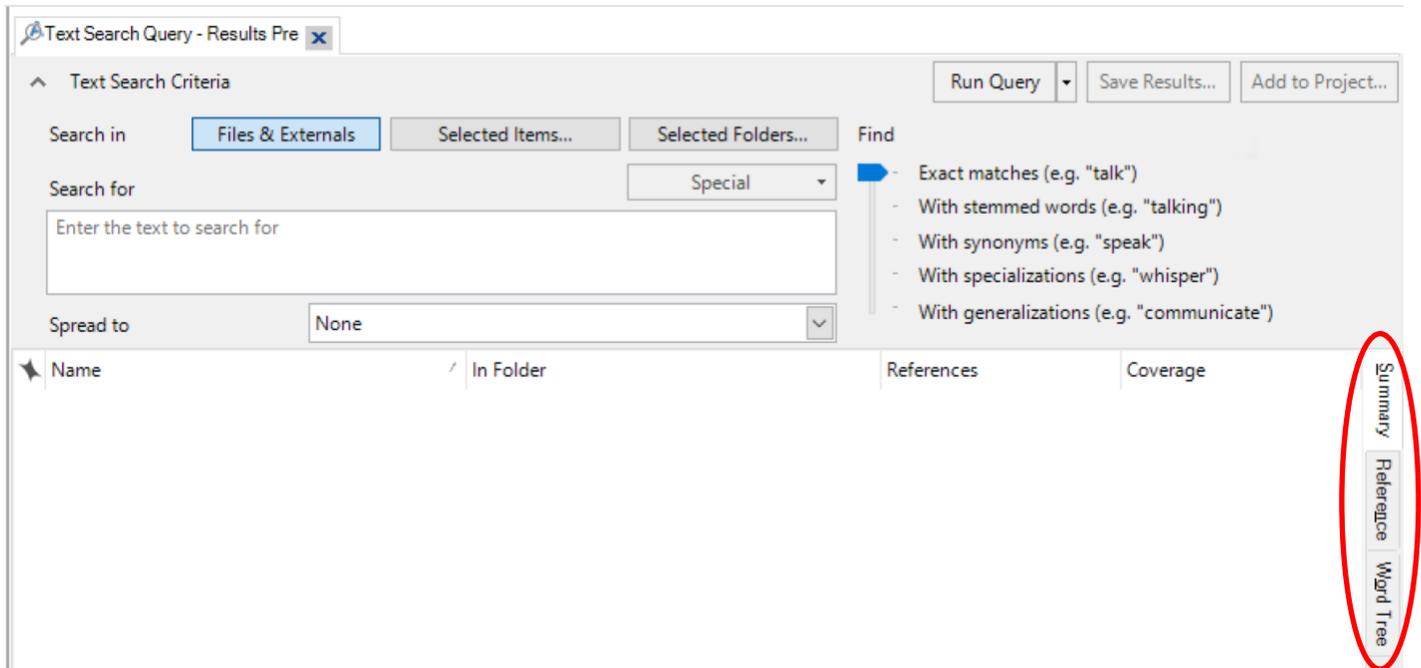
Visualizing a Text Search Query

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 file
- A **Reference** list, which lists all the references in the files
- 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. [The word tree will only appear if you chose “None” in the ‘Spread to’ drop-down menu, because the Tree cannot be created for phrases, only for single words]

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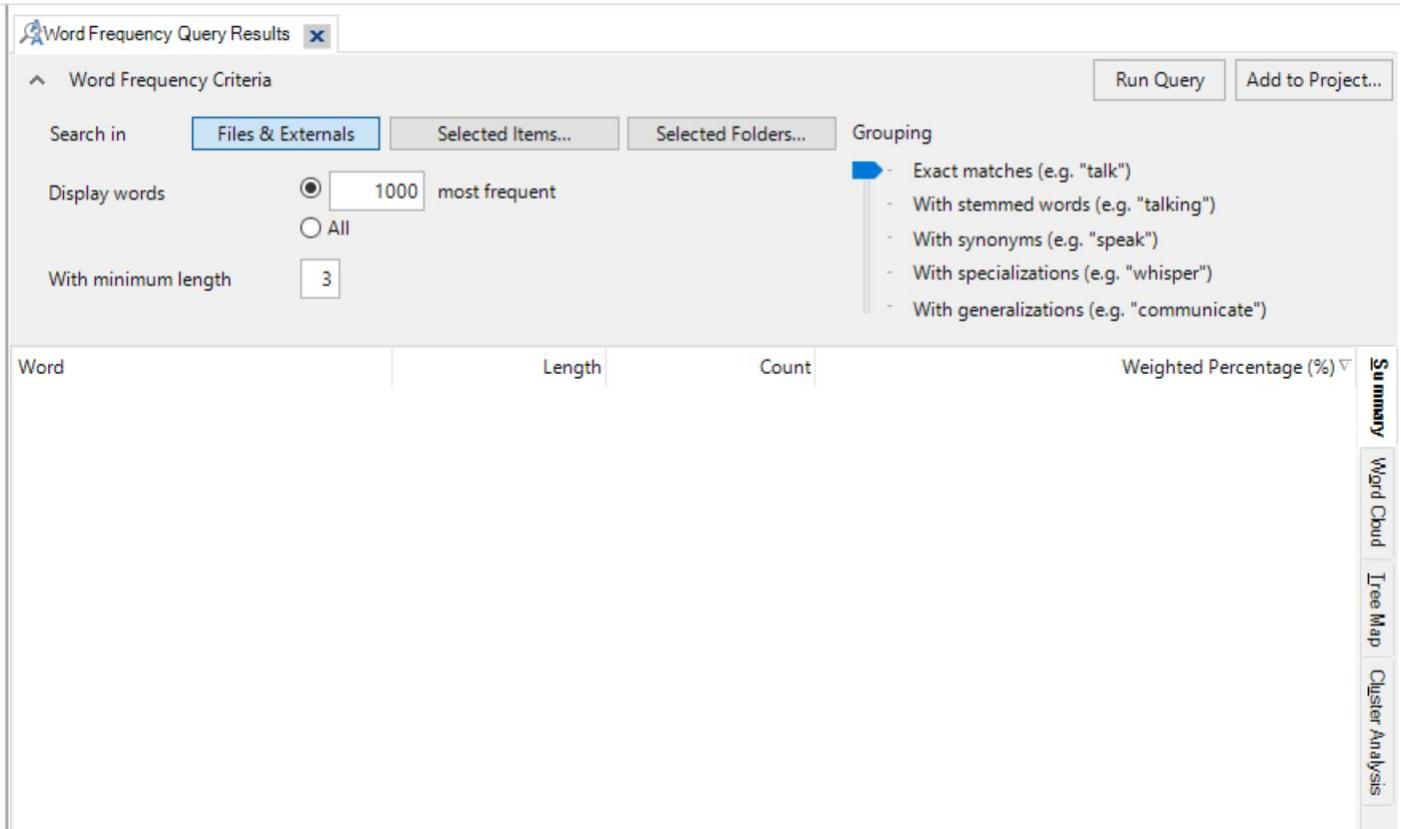
5. Running a Word Frequency Query

- In the **Explore** Tab, under the query group, click on the **Word Frequency** button
- In the box which pops up,
 - Select which files you want to use for the query (files and externals, selected items or selected folders only)
 - Choose how many words you want to display (e.g., the 100 most frequent, the 1000 most frequent) or if you want to display all words
 - Use the box to set the minimum word length (3 typically used for English to exclude some articles, prepositions and pronouns; for the longer words the ‘stop-word list’ can be used¹)
 - Use the slider to determine how exact you want the matches to be
- Click ‘Run’ to begin your query

¹ To view and edit the (default) **stop word list**: File tab => Project Properties => General tab => click the Stop Words button. In the window that pops up you can view and edit the stop word list by removing or adding new words. Each word must be separated by a space. In the Word Frequency query results window you will also be able to add selected words to the stop word list quickly.

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Visualizing Word Frequency Queries

Once you have run a word frequency query, you have a number of options for how to display the results. Using the tabs at the side of the Word Frequency detail view, you can choose to create

- 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
- A **Tree Map**, which displays hierarchical data as a set of nested rectangles
- Various kinds of **Cluster Analyses** (e.g., dendrograms, cluster maps, circle graphs)²

In addition, right-clicking on the results of a word frequency query will give you a menu with options to create new nodes, run text search queries, add the selected word to the stop-word list, or export your query visualization.

² There are no customization options for suggested visualization methods (colors and shapes are set).

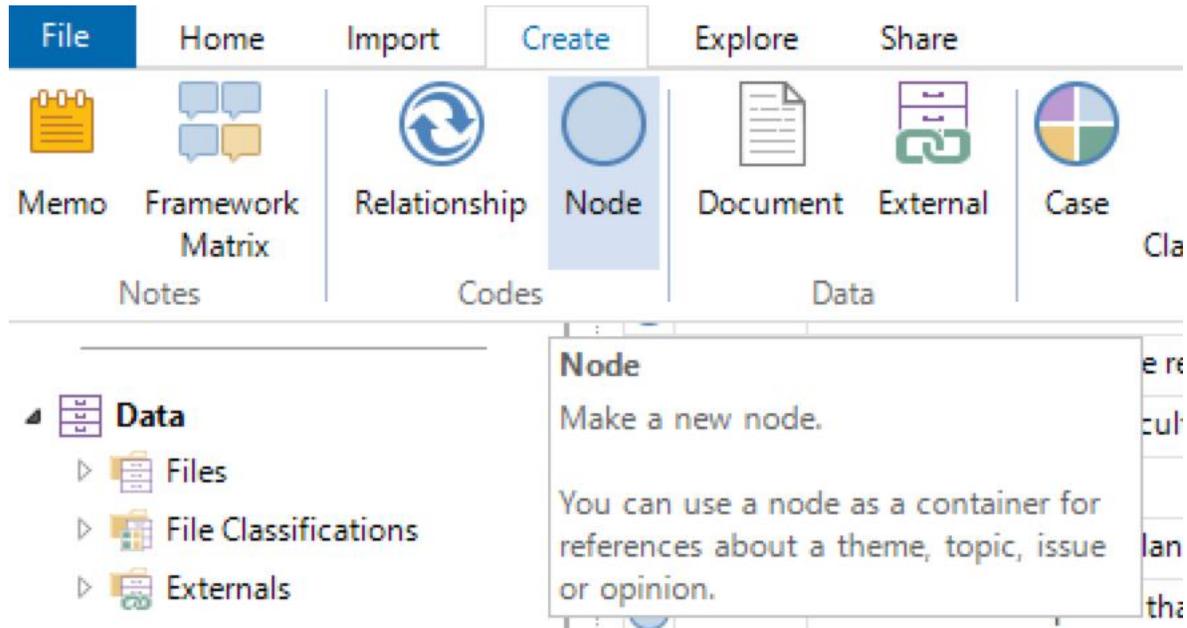
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6. Nodes: Use & Coding

Creating a new Node

- In any view, you can click on the **Create** Tab, then under codes group click on the ‘Node’ button [when you already have nodes in your project, you can create **sub-nodes** within the main node by selecting an existing node before clicking on the ‘Node’ button on the **Create** tab]



OR

- In the **Nodes List** view, right-click in the list view, and select ‘New Node’ in the menu which pops up

OR

- Create a new Node from the result of a word frequency or text search query. Right-click on a word, and select ‘New Node’ in the menu which pops up

OR

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

Node Summary View [switch between Summary and References using the tabs on the right]

The screenshot displays the 'Node Summary View' in NVivo. On the left, a list of nodes is shown with columns for Name, Description, Files, and References. The 'Agriculture' node is selected. On the right, a detailed view of the 'Agriculture' node is shown, with columns for Name, In Folder, References, and Coverage. The 'References' and 'Coverage' columns are circled in pink. Below the detailed view, four pink callout boxes identify the columns: 'Name of file', 'File Location', '# of references', and '% of the file covered by the reference'. On the far right, a vertical pink oval highlights the 'Summary', 'References', 'Text', 'Picture', and 'Diagrams' tabs, with the text 'View tabs' next to it.

Name	Description	Files	References
Attitude	A person's general feeling of f	0	0
Balance		6	16
Community change	Change to the people, culture,	18	62
Economy	Text coded around issues of ec	25	486
Agriculture		8	20
Fishing or aquaculture	Harvesting of wild seafood is t	19	367
Jobs and cost of living		16	86
Tourism		7	12
Infrastructure		11	43
Memorable quotes	This node is for quotes that an	5	16
Natural environment	A collection of nodes around c	24	324
Policy, management	Coding about policy, planning,	14	38
Real estate development	Covers all aspects of the real e	27	313
Sense of community Down	Text coded to topics around th	3	4

Name	In Folder	References	Coverage
Area and Township Information	Files\Area and Township	2	10.68%
Barbara	Files\Interviews	4	9.17%
Carteret with boundary and county names	Files\Area and Township\Aerial	1	4.17%
Charles	Files\Interviews	1	1.84%
Dorothy	Files\Interviews	4	9.31%
Mary and James	Files\Interviews	3	17.32%
Survey Responses	Files\Survey	4	0.77%
William	Files\Interviews	1	5.94%

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Node References View

The screenshot shows the NVivo interface with the 'Nodes' list on the left and the 'References' view on the right. The 'Nodes' list includes:

Name	Description	Files	Refer
Econo	Text coded around issues	25	486
Fis	Harvesting of wild seafood	19	367
Job		16	86
Agr		8	20
Tou		7	12
Natural	A collection of nodes arou	24	324
Real es	Covers all aspects of the re	27	313
Comm	Change to the people, cult	18	62
Infrastr		11	43
Policy,	Coding about policy, plan	14	38
Memor	This node is for quotes tha	5	16
Balanc		6	16
Sense	Text coded to topics arou	3	4
Attitud	A person's general feeling	0	0

The 'References' view shows details for the 'Agriculture' node. It displays the file path, the number of references, and coverage percentage. The first reference is titled 'File 1 title' and contains the text: 'The main occupations of Davis through the years, have been farming and fishing; in most cases, a combination of both.' The second reference is titled 'Reference 2 in File 1' and contains the text: 'People who lived in the Straits section of Carteret County began to settle in what is today know as Otway and Bettie. Both sections, one on either side of Ward's Creek, wanted the name Otway, for the famous Otway Burns, so finally they broke apart into two separate communities. Otway being on the east of the creek, and Bettie on the west. In this area are some of the richest farm lands in Carteret County. Primary crops now grown in Bettie are cabbage, Irish potatoes, corn and soybeans.'

Coding

Code at a new node

- Go to the files folder, and open the file you would like to code
- On the opened file, select the content you want to code
- On the **Home** tab or the **Document** tab, in the **Coding** section, choose **Code => Code...**
- In the **Select Code items** box, choose where you want to store the node by selecting the folder or another node, if you want to create a new child node, then click the **New Node** button to create the node
- Enter a name for the node
- Click **OK** and a confirmation message is displayed on the status bar

OR

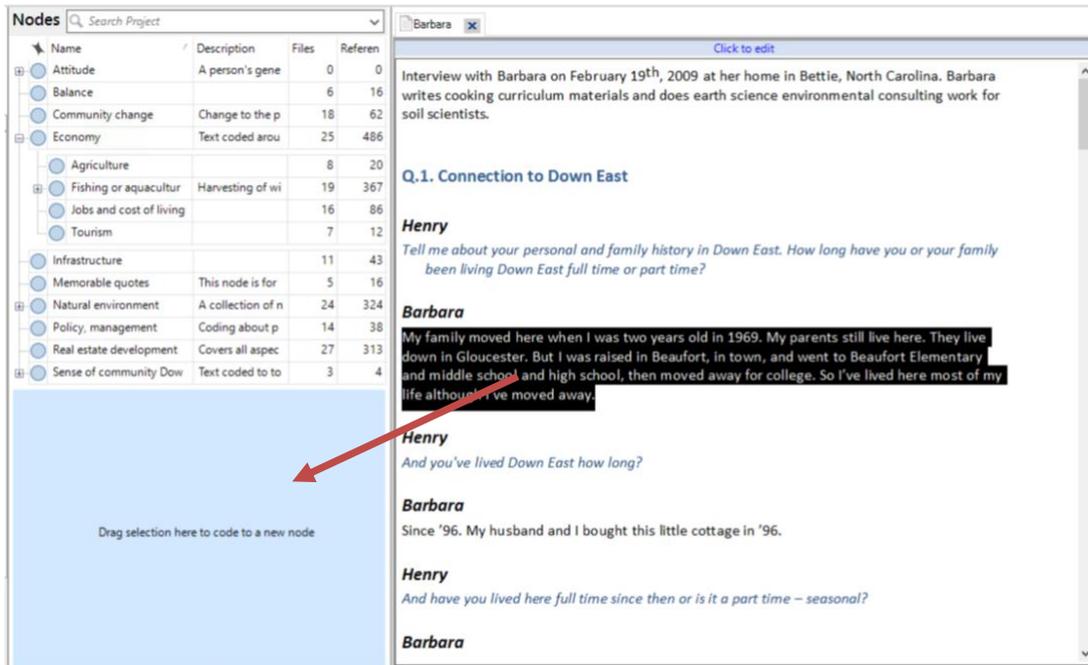
- Select the text content you want to code
- On the **Document** tab, in the **Coding** group, click **Code In Vivo**
The node is created in the 'Nodes' main folder with the name same as the selected text

OR

- Drag and drop coding
 - Go to the files folder, and open the file you would like to code
 - Go to Nodes folder, so you have your nodes list view right next to the file you want to code. 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 bottom section of your nodes view

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- Enter a name for the node
- Click **OK** and a confirmation message is displayed on the status bar

OR

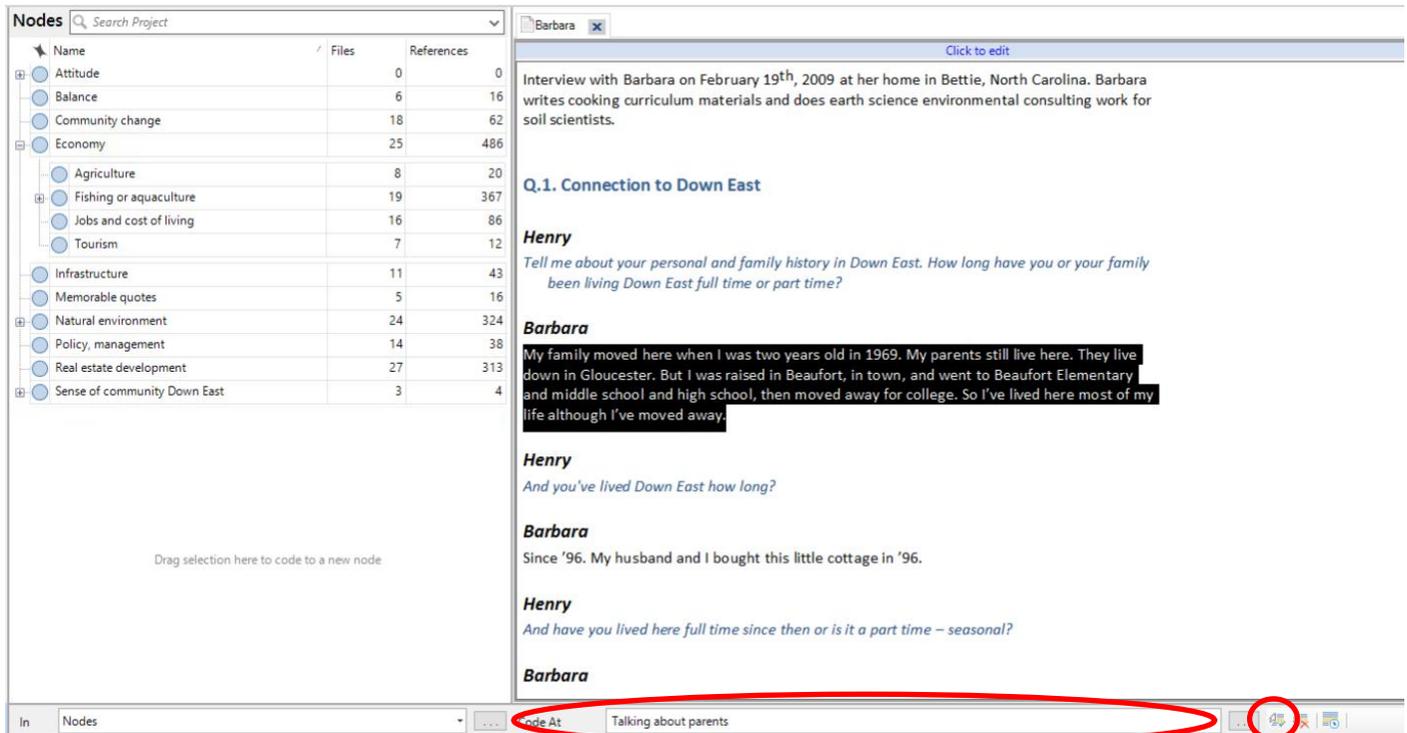
- Right click
 - Go to the files folder, and open the file you would like to code
 - On the opened file, select the content you want to code
 - Right click on selected content
 - From the pop-up menu, select code
 - In the **Select Code items** box, choose where you want to store the node by selecting the folder or another node, if you want to create a new child node, then click the **New Node** button to create the node
 - Enter a name for the node
 - Click **OK** and a confirmation message is displayed on the status bar

OR

- Quick coding bar
 - Go to the files folder, and open the file you would like to code
 - On the opened file, select the content you want to code
 - On the quick coding bar, enter a name for your new node, and then click code

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Code at an existing node

- Select the content you want to code
- On the **Home** tab or the **Document** tab, click **Code=> Code...**, and choose one of the **Existing Nodes**, and click OK

OR

- Drag and drop coding
 - Go to the files folder, and open the file you would like to code
 - Go to Nodes folder, so you have your nodes list view right next to the file you want to code. 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

OR

- Quick coding bar
 - Go to the files folder, and open the file you would like to code
 - On the opened file, select the content you want to code

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- On the quick coding bar, type the name of the existing node (as you start typing, name of nodes will start to show up), and then click code

The screenshot shows the NVivo interface with a transcript window titled "Barbara". The transcript contains the following text:

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
I see. So – but you were not born in Carteret County, but you lived most of your life one way or the other there –

Barbara
Yeah. And I'r

Henry
So what attr

Barbara
At that time

A node list is open over the transcript, showing the following nodes:

- Due to **environment** impacts of fishing (Nodes\\Economy\Fishing or aquaculture\Fishing industry decline)
- Ecosystem services (Nodes\\Natural **environment**)
- Environmental** change (Nodes\\Natural environment)
- Environmental** impacts (Nodes\\Natural environment)
- environmentalists** (Nodes\\Autocoded Social Media\\Hashtags)
- Habitat (Nodes\\Natural **environment**)
- Landscape (Nodes\\Natural **environment**)
- Natural **environment** (Nodes)

The "Code At" bar at the bottom shows the text "Environ" and a dropdown menu with "Environ" selected.

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7. Keyboard Shortcuts

Shortcut	Function
Creating items	
CTRL+Shift+N	Create a new folder (click first on any folder, and then use the shortcut) or you can create any item, open the list view of nodes to create new node, or the list view of files to create a new document, or the list view of memos to create a new memo. Need to do one click on any of the list view to create the item.
Importing files and memos	
CTRL+Shift+I	Import a new file or memo, open the corresponding list view, do one click and the use the shortcut
Working with Nodes	
CTRL+Shift+N	Create a new Node (in the Node List view only)
Working in documents and transcripts	
CTRL+E	Switch between ‘Read Only’ and the ‘Editable’ modes (editing the files does not affect the original doc files)
Coding files	
CTRL+F3	Code selected content within a file at a new node
CTRL+F2	Code selected content within a file at an existing node (you will be asked what node you want to code at)
CTRL+F6	Code a selected file at a new node
CTRL+F5	Code a selected file at an existing node (you will be asked what node you want to code at)
CTRL+F8	Code in vivo (selected text will be coded at and used to name a new node)
Working with audio and video	
F4	Play or pause the media player
F8	Stop the media player
F11	Mark the start of a selected portion of the file
F12	Mark the end of a selected portion of the file