NVIVO

NVivo for Mac

Getting Started Guide

QSR
International

Version 11.1

www.qsrinternational.com
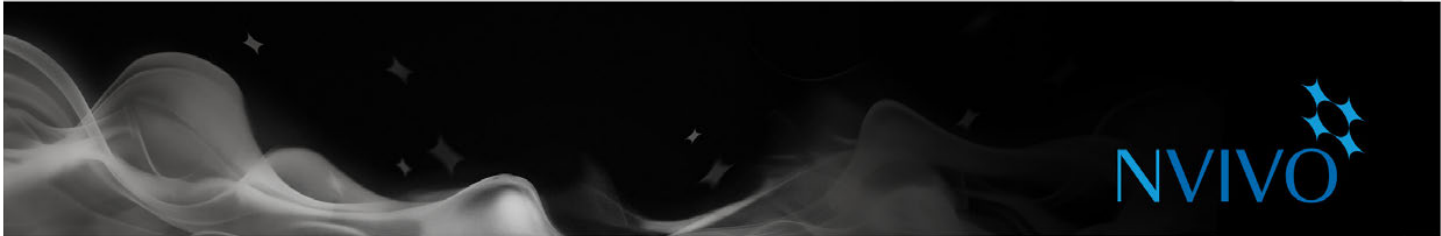
Contents

Introducing NVivo for Mac

This release of NVivo for Mac enables you to collect, organize, and analyze content from interviews, focus groups, web pages, social media conversations, surveys, observations, and literature.

Understand the features that are available

In this version of NVivo for Mac you can do the following:

- **Work with documents and memos** (doc, docx, rtf, txt or odt) You can create or import documents and memos, code the content and apply basic formatting.

- **Work with PDFs** You can import PDFs and code the text content.

- **Work with datasets** You can import spreadsheet files as datasets. You can code the content manually or you can use auto coding to speed up the coding process.

- **Work with pictures** You can import digital photos or other images. You can create a picture log. You can code the picture log or selected regions of the picture.

- **Work with web content** You can use NCapture to gather material from the web and then import it into your project as a PDF source. You can also capture social media content from Facebook and Twitter and import it into you project as a dataset source.

- **Work with audio and video materials** You can import audio and video materials and code the media. You can transcribe directly in NVivo or you can import transcripts into your audio or video sources. Refer to the NVivo for Mac Help for information about supported media formats.

- **Create nodes** You can create new nodes and organize them into hierarchies. You can also turn on node aggregation to gather all coding references from child nodes at the parent node.

- **Work with bibliographic references** You can export references from EndNote and then import them into your NVivo for Mac project.

- **Coding** You can code to new or existing nodes. You can select content and then code it using commands on the ribbon, shortcut menus or use keyboard shortcuts. You can also use drag and drop coding or 'in vivo' coding (make new nodes based on selected text).

- **Review the content in a node** You can review the coded content as plain text and set options that allow you to see the context of the coding references—for example, see the paragraph surrounding the coded content to help you understand the context.

- **Display coding stripes** You can display coding stripes in sources and nodes to see how the content has been coded.

- **Create annotations** You can record your ideas and mark content for followup in documents, PDFs, memos and externals.

- **Work with classifications and attributes** You can use case classifications to record demographic details about the people, places or other 'cases' in your project. You can use source classifications to record information about the sources in your project.
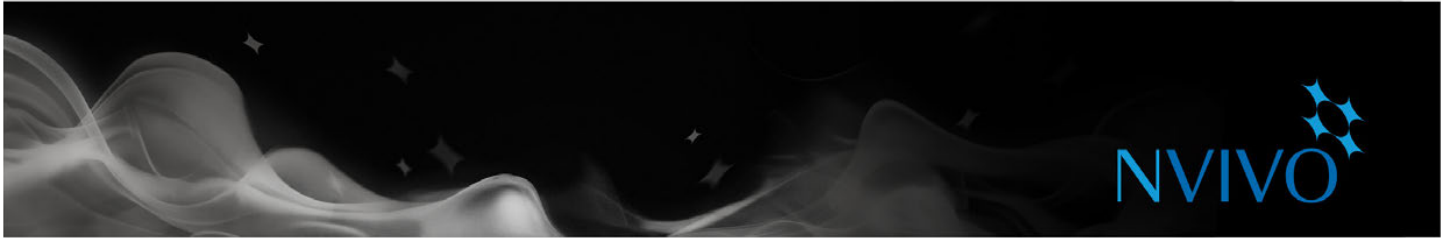
- **Work with sets** You can create sets and add items to them. You can use these sets as the scope for your Text Search or Coding queries.

- **Import projects** You can import another NVivo for Mac project into your open project. Teams members can work on copies of a project and then import the copies into a 'master' project at regular intervals.

- **Run Coding queries** You can explore your coding using a Coding query. Coding queries can help you to test ideas, explore patterns and see the connections between the themes, topics, people and places in your project.

- **Run Text Search queries** You can find words and phrases and automatically code content using Text Search queries and visualize the results in a word tree.

- **Run Word Frequency queries** You can find the most frequently occurring words in your sources and visualize the results in a word cloud.

- **Run Matrix Coding queries** You can cross-tabulate coding intersections—this can help you to make comparisons and see patterns.

- **Run Coding Comparison queries** You can compare coding done by two users (or two user groups) to measure the 'inter-rater reliability' or degree of agreement for coding between the users.

Refer to the comparison table on the QSR Website for more detailed information.

How to use this guide

This guide will help you to get up and running. It provides step-by-step procedures for fundamental tasks, and suggests ideas and techniques to help you move forward with your project.

ideas

Hints, tips and techniques are displayed in these panels.

If you want to share your own tips and techniques—join us on the QSR Forum.

For more information about working with NVivo refer to:

- NVivo Help—on the menu bar, choose Help > NVivo Help.

- The QSR website (www.qsrinternational.com)—access video tutorials, the QSR forum, FAQs, training and support.

- The NVivo blog covering issues, trends and best practice in qualitative and mixed methods research

- The NVivo Users Group on LinkedIn, the QSR Facebook page or @QSRInt on Twitter.
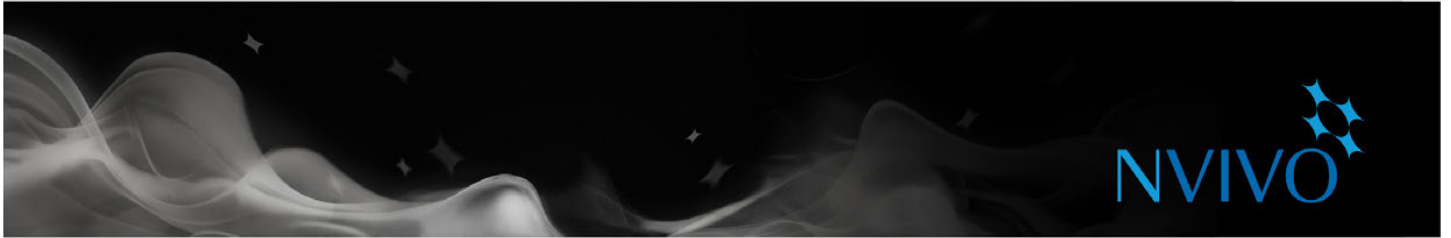
NVivo and qualitative research

Many qualitative researchers are interested in evaluating, interpreting and explaining social phenomena. They analyze data from interviews, field notes and journal articles—and they work in a range of sectors; from social science and education to healthcare and business.

Support for your chosen methodology

Researchers usually adopt a qualitative methodology to suit their research question. For example, a social scientist wanting to develop new concepts or hypotheses may take a 'grounded theory' approach. A health researcher looking for ways to improve policy or program design might use 'evaluation methods'. NVivo doesn't favour a particular methodology—it's designed to facilitate common qualitative techniques for organizing, analyzing and sharing data—no matter what method you use.

NVivo key terms

As you work through this guide you'll be introduced to a number of key concepts but here are some basic terms to get you started:

- **Sources** are your research materials including documents, PDFs, datasets, pictures, audio, video and memos.

- **Source classifications** let you record information about your sources—for example, bibliographical data.

- **Coding** is the process of gathering material by topic, theme or case. For example, selecting a paragraph about water quality and coding it at the node 'water quality'.

- **Nodes** are containers for your coding that can represent themes, topics or other concepts—they let you gather related material in one place so that you can look for emerging patterns and ideas.

- **Cases** are containers for your coding that represent your 'units of observation'—for example, people, places, organizations or artifacts.

- **Case classifications** allow to you record information about people, places or other cases—for example, demographic data about people.

How do I approach my research project?

There is no agreed 'industry standard' or prescribed process for approaching a qualitative project but there are some recognized strategies and steps you can take—you'll find some suggestions as you work through this guide. It can help to understand that qualitative research is an iterative process—for example, this picture shows a path you might take when exploring a particular theme:

Bring in interview documents

Import

Record your insights and use this memo when you write up your project

Memo

Open and explore the interviews

Explore

Code

Some participants talk about 'balance' – this is interesting! Make a node to collect all the references

Visualize

Display a word tree to see how people talk about 'balance'

Reflect

Query

Gather the query results in your 'balance' node and review all the material in one place

Do other people talk about 'balance' too? Run a Text Search query to find out

Explore the sample project

If you prefer 'hands on' learning, you may like to explore and work with the NVivo sample project—Environmental Change Down East. This is a 'real-world' project that illustrates the main features of the product. Looking at how the sample project is organized may give you ideas about approaching your own project. You can also use the sample data to experiment with queries and other analysis tools.

Install and activate NVivo for Mac

Before installing, make sure that your computer meets the hardware and software requirements:

Minimum requirements

NVivo supports the following minimum requirements:

- Mac computer with an Intel Core 2 Duo, Core i3, Core i5, Core i7, or Xeon processor
- Mac OS X 10.9 (Mavericks) and above
- 2GB of RAM (as defined by the Mac OS X Mavericks minimum requirements)
- 1280 x 800 screen resolution
- 2GB of available disk space—or more depending on data storage needs

Recommended requirements

The following system requirements are recommended for optimum performance:

- Mac computer with an Intel Core i5, Core i7, or Xeon processor
- Mac OS X 10.9 (Mavericks) and above
- 4GB of RAM
- 1440 x 900 screen resolution or higher
- 4GB SSD of available disk space—or more depending on data storage needs
- Internet connection
- Google Chrome 44 or later (required for NCapture—a browser extension that allows you to gather material from the web)

Install NVivo

To install NVivo:

1. Locate and double-click the NVivo dmg file that you downloaded. If you have the NVivo 11 USB flash drive, the NVivo for Mac dmg file is in the root folder.

2. Drag the NVivo icon into your Applications folder.

If you already have a previous version of NVivo for Mac installed, make sure the application is closed before you install this version. You can choose to **Keep** both versions or **Replace** the older version of NVivo. If you keep both versions, you can rename the second one.

Start NVivo and activate the software

When you first start NVivo you are prompted to activate your software. Activation is a simple and secure process that ensures only valid licenses are used to operate the software.

If you are using a trial version of the software, you do not need to enter a license key, but you must activate the trial before you can use NVivo.

To start NVivo and activate your license:

1. Click the NVivo icon in the dock or double-click the NVivo icon in the **Applications** folder in the Finder.

2. Accept the license agreement, if prompted.

3. When prompted, enter your license key (or choose the option for a free trial), and then click **Next**. You can find the license key on the NVivo for Mac packaging or if you downloaded the software you can find the key in the email communication from QSR. To ensure accuracy, we recommend you copy and paste the license key from the email.

4. In the **License Activation** dialog, enter your details and click **Activate**—if you are connected to the Internet, you can activate immediately.

5. In the **NVivo** - **User Profile** dialog, enter the initials you want to use to identify your work in NVivo projects. This is especially useful if you are working with other team members on the same project.

6. Click **Continue**. The **Welcome to NVivo for Mac** window is displayed:

Create a new project

Create the NVivo sample project.

Access online help and link to other resources
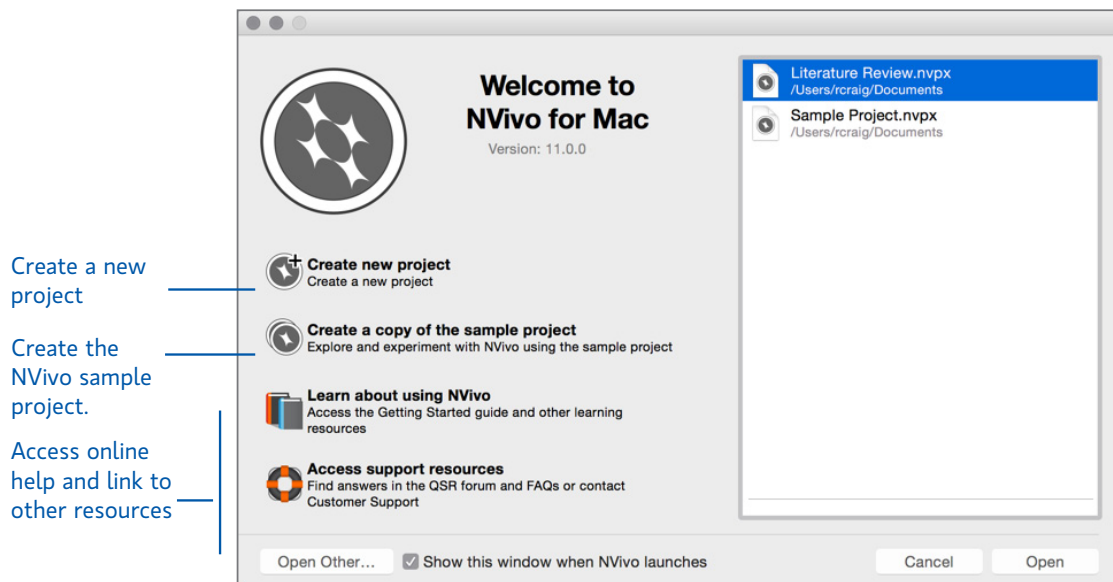
Create a new project

You can create a new project (saved as a .nvpx file) on your computer.

1. On the **Welcome to NVivo for Mac** window, click **Create new project** or choose **File** > **New Project**.

2. In the **Save As** field, type a name for this project (you can change the title and add a description if you want to).

3. Click **Create**.

Open a project

To open a project saved on your computer:

1. Choose **File** > **Open**. To open a recent project choose **File** > **Open** > **Recent**.

2. Select the .nvpx project file you want to open, and then click **Open**.

Note: NVivo is also available as a Windows application. If you want to convert an NVivo for Windows project (.nvp), so that you can work with it in the NVivo for Mac format (.nvpx), you can use the copy project feature in NVivo 11 for Windows and save the project to the NVivo for Mac format.

ideas

Early steps

- Experiment and learn. You could create an initial 'play' project and get a feel for importing, coding and organizing sources.

- Consider your project structure. When you are ready to work on your 'real' project, spend some time planning how you will set things up—for example, what or who are your units of analysis? Do you have a thematic framework? Remember that your approach will depend on your research methodology and design.

- Create a journal. Before you import your source material you could take some time to create a memo (journal) and state your research questions and record your goals. Why are you doing the project? What is it about? What do you expect to find and why? What biases do you bring to the project? Update the journal regularly to stay focused and to show the evolution of your project.
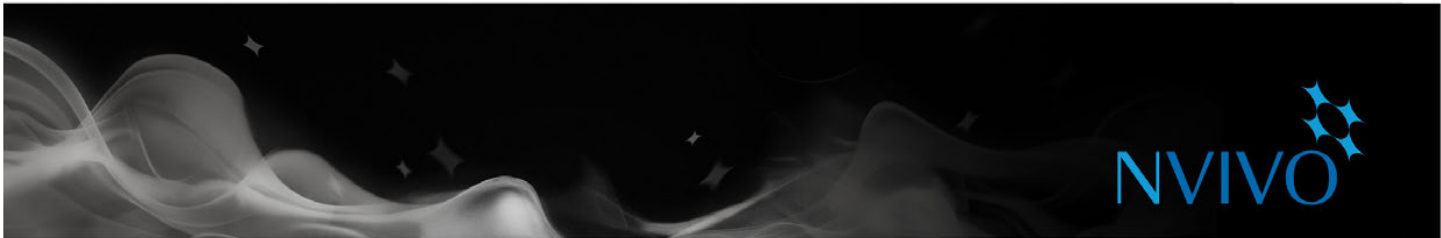
The NVivo work area

The NVivo work area provides easy access to all your project material.

See the contents of a folder in List View

Most NVivo commands are available on the menu or the ribbon

Navigation View lets you organize your material into folders
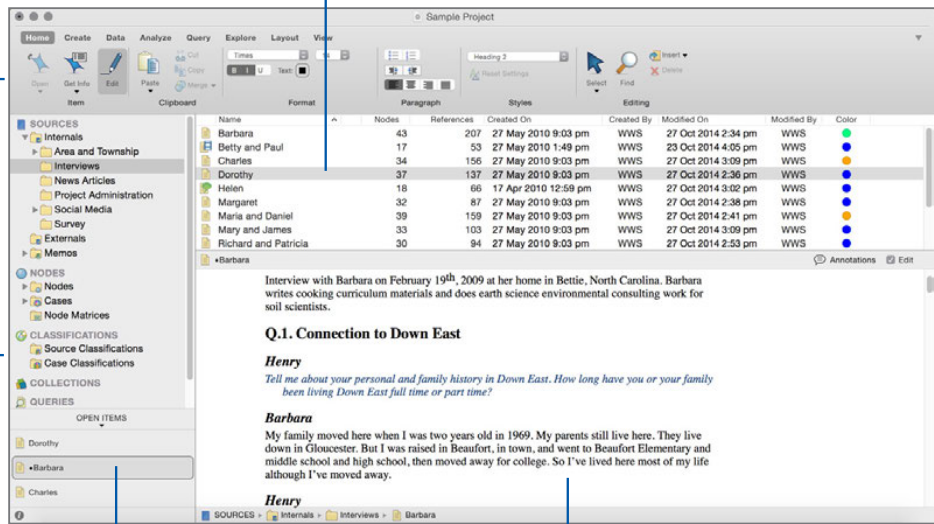
Move between currently open items

Work with your sources, nodes or other project items in Detail View
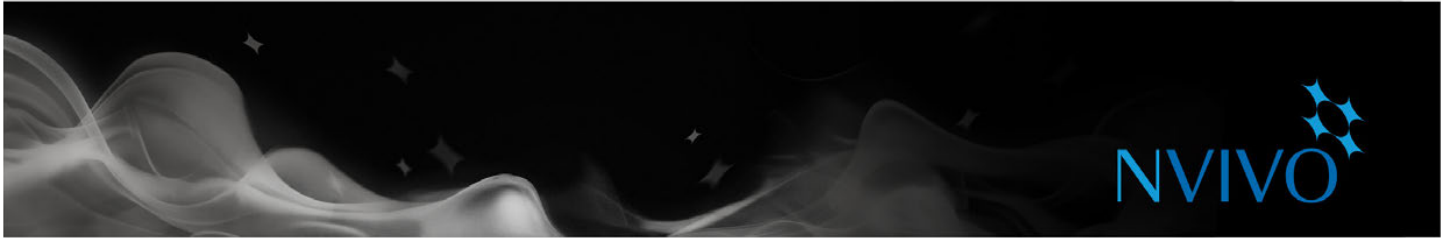
Work with the ribbon or the menus

You can work with NVivo using the menu commands or the ribbon. On the ribbon, commands are organized into logical groups, collected together under tabs. Each tab relates to a type of activity, such as creating new project items or analyzing your source materials.

The File menu gives you access to project-related commands

Most NVivo commands are available on the menu or the ribbon

Menu

The ribbon provides easy access to most commands

Commands are organized in groups
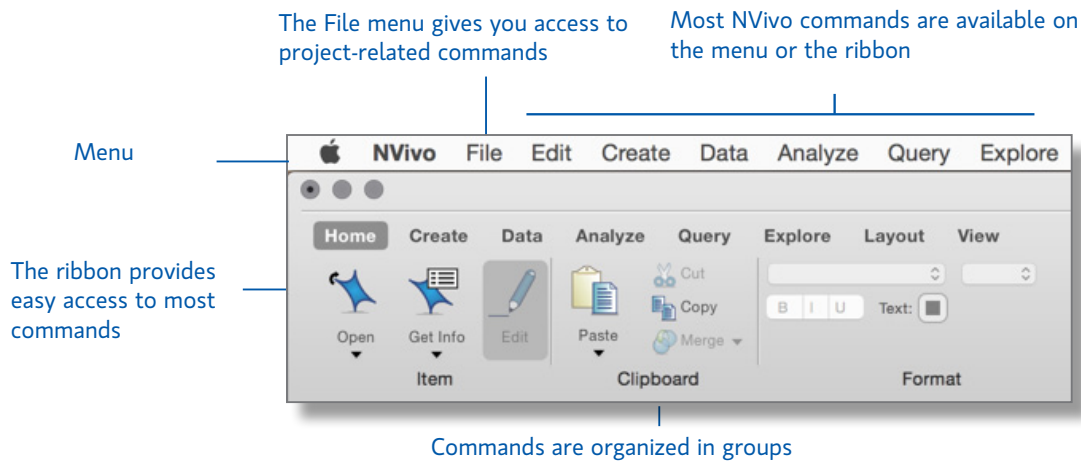
Navigation View

Navigation View helps you to organize and easily access all of the items in NVivo:

NVivo provides folders for your research materials. You can add folders under them to organize project items

Click to close all items that are currently open

Click to close an individual item

This area shows all the items that are currently open
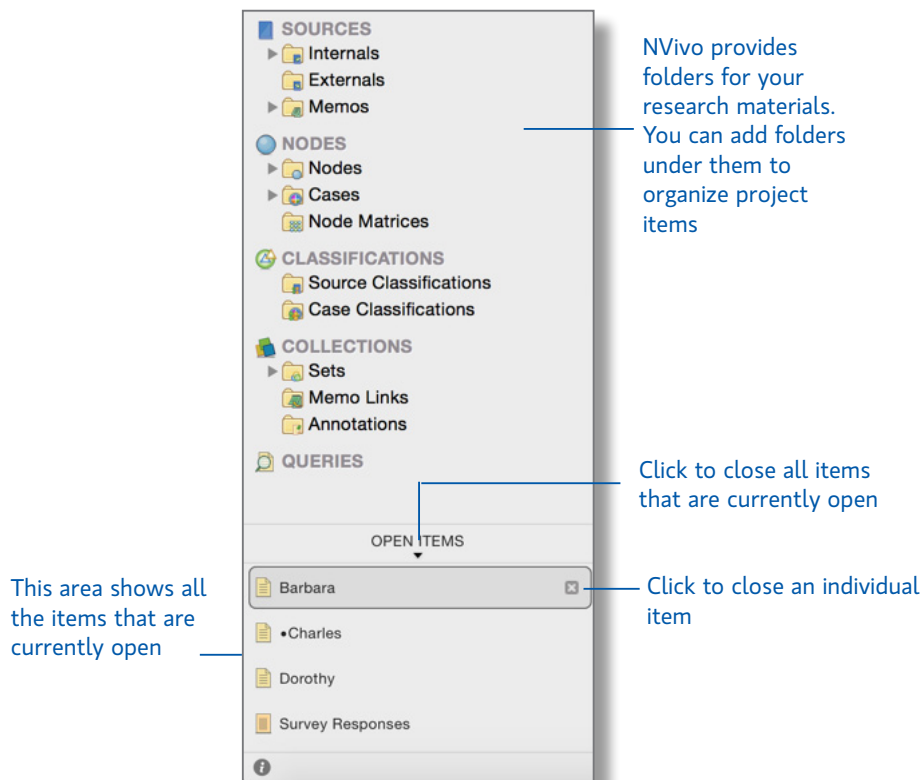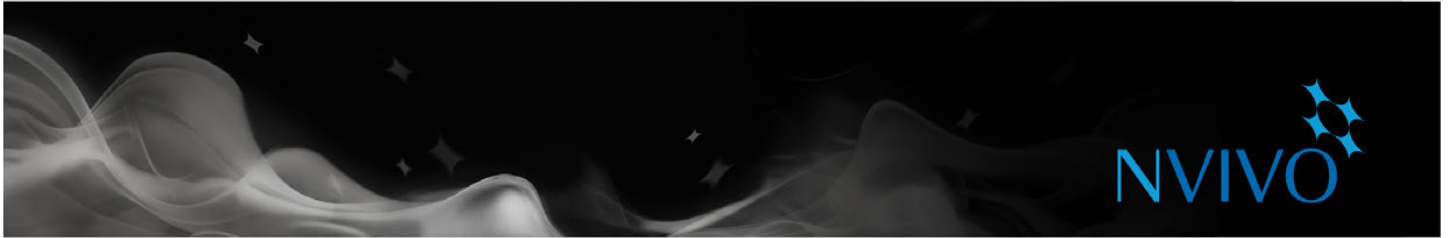
List View

When you select a folder in Navigation View, its contents are displayed in List View. In this view, you can add new items, open existing items and edit item properties. This List View displays the contents of a folder:

Double-click an item to open it

Drag boundary to resize columns

Sort the list by clicking on column headings

See the assigned color

Name	^	Nodes	References	Created On	Created By	Modified On	Modified By	Color
Barbara		43	207	27 May 2010 9:03 pm	WWS	27 Oct 2014 2:34 pm	WWS	🟢
Betty and Paul		17	53	27 May 2010 1:49 pm	WWS	23 Oct 2014 4:05 pm	WWS	🔵
Charles		34	156	27 May 2010 9:03 pm	WWS	27 Oct 2014 3:09 pm	WWS	🟠
Dorothy		37	137	27 May 2010 9:03 pm	WWS	27 Oct 2014 2:36 pm	WWS	🔵
Helen		18	66	17 Apr 2010 12:59 pm	WWS	27 Oct 2014 3:02 pm	WWS	🔵
Margaret		32	87	27 May 2010 9:03 pm	WWS	27 Oct 2014 2:38 pm	WWS	🔵
Maria and Daniel		39	159	27 May 2010 9:03 pm	WWS	27 Oct 2014 2:41 pm	WWS	🟠
Mary and James		33	103	27 May 2010 9:03 pm	WWS	27 Oct 2014 3:09 pm	WWS	🔵
Richard and Patricia		30	94	27 May 2010 9:03 pm	WWS	27 Oct 2014 2:53 pm	WWS	🔵
Robert		31	99	27 May 2010 9:03 pm	WWS	27 Oct 2014 2:57 pm	WWS	🟠

Detail View

When you open an item from List View it is displayed in Detail View. This is an example of an interview opened in Detail View:

Barbara   Annotations   Edit

Click Edit to make changes

Q.2. Connection to Down East natural environment

Henry

What do you value about the environment Down East?

Barbara

How close the people are to the cycles of the – to the environment, people intimate with the environment which I appreciate, the knowledge of the water and the weather.

I enjoy the weather. It's so nice and mild. And I like hot summers. I like hot, humid summer on the water. I think it's a beautiful environment and beautiful landscape. It's not dramatic. I also love the Utah deserts and California. But I like this subtle, sublime sort of beauty here – the environment here.

I particularly enjoy being out on the water Down East. And my – he's not really my uncle, but a friend who I call an uncle – I just help him set his flounder nets and things like that. He does fishing, commercial fishing, but actually he's not commercial, just for his own freezer. And he knows everything about the water and just living off of the land – the seafood here.

Q.3. Professional perspective on Down East

Henry

So how did you end up doing the work that you do? I'm particularly interested in – since this is an interview focused on sort of environmental issues, the work that you do in relationship

SOURCES ▸ Internals ▸ Interviews ▸ Barbara

Sharing projects in a team

Many projects involve multiple researchers working together. With NVivo for Mac, you can work in copies of a project and merge them into a master project at appropriate intervals—making use of user profiles to track changes. You can find out more about this in the NVivo for Mac Help.

ideas

Preparing for teamwork

If you are collaborating on a project you might want to consider the following:

- Appoint a team leader who will keep the team on track and make final coding decisions.

- Have regular team meetings to discuss interpretations, address issues and assign tasks—record the outcomes in a memo.

- Have each team member keep a memo to record their progress, including any hunches, suggestions or questions—you could also do this in a single 'teamwork journal'.

- Early on, have multiple team members code the same collection of sources, then compare coding (using coding a coding comparison query)—this can help ensure a consistent approach.

- To start with, make a thematic node hierarchy for each team member. After team discussion, you can refine, merge and reorganize.

- Aim for a clear thematic node structure and use descriptions (in node properties) to make the purpose of theme and case nodes clear for all team members.
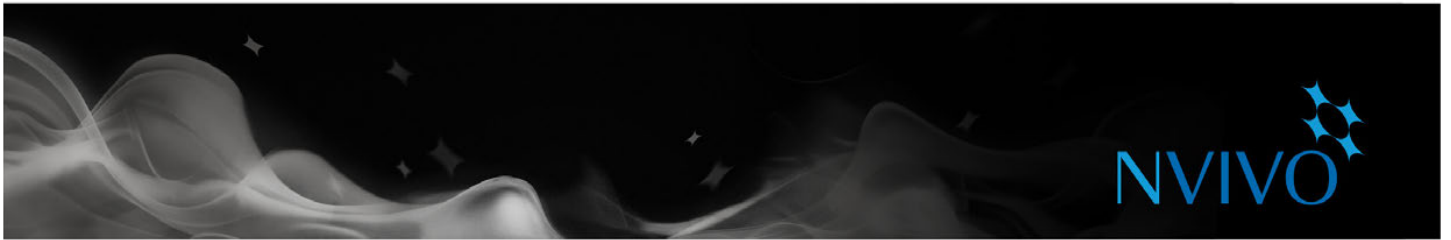
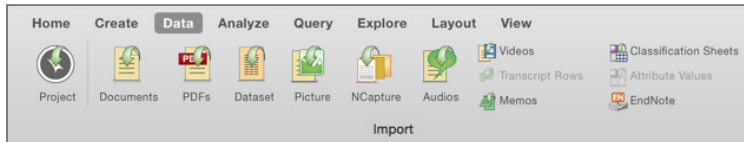# Bring your material into NVivo

Sources are the materials that you want to analyze in NVivo—they can include articles, interviews, survey results, audio/video recordings, pictures, web pages or social media content.

To import sources, use the options on the **Data** tab:

Interviews, articles and other documents

You can import interviews, journal articles, reports and any other documents or PDFs:
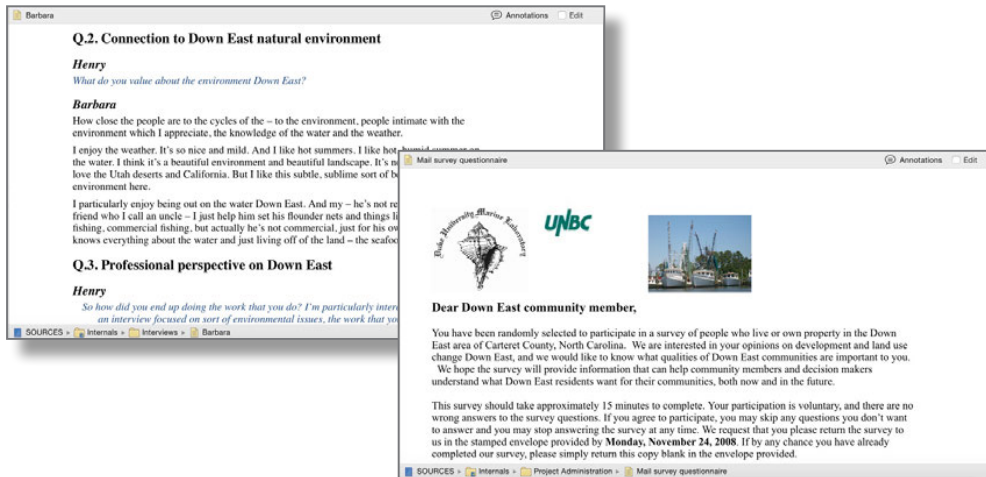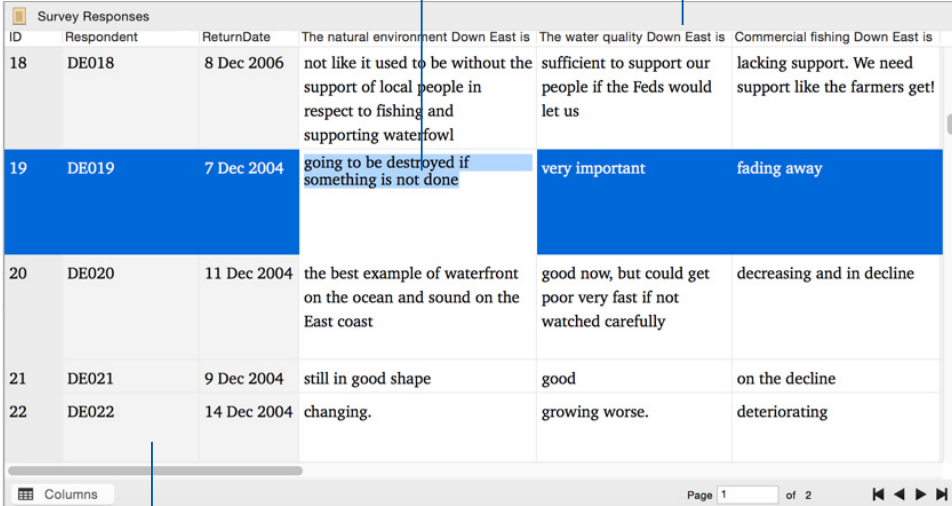
Survey results and other datasets

A dataset contains structured data arranged in records (rows) and fields (columns)—for example, a dataset could contain the responses to a survey.

You can create a new dataset source in NVivo by importing:

• Data from a spreadsheet file

• An NCapture file that contains social media data

You cannot edit the contents of a dataset once it is imported. Before importing spreadsheets, you should prepare your data and consider how you want to use it in NVivo—refer to the NVivo for Mac Help for detailed instructions.

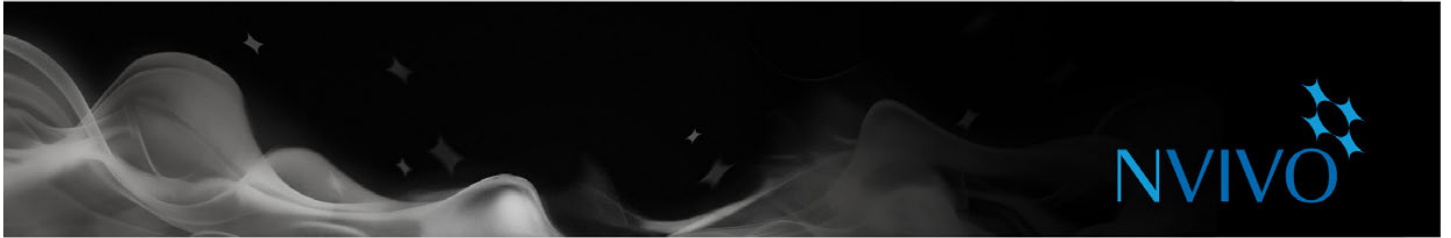Select content and
code it at a node

Select a 'codable' column and
gather the contents in a node

ID	Respondent	ReturnDate	The natural environment Down East is	The water quality Down East is	Commercial fishing Down East is
18	DE018	8 Dec 2006	not like it used to be without the support of local people in respect to fishing and supporting waterfowl	sufficient to support our people if the Feds would let us	lacking support. We need support like the farmers get!
19	DE019	7 Dec 2004	going to be destroyed if something is not done	very important	fading away
20	DE020	11 Dec 2004	the best example of waterfront on the ocean and sound on the East coast	good now, but could get poor very fast if not watched carefully	decreasing and in decline
21	DE021	9 Dec 2004	still in good shape	good	on the decline
22	DE022	14 Dec 2004	changing.	growing worse.	deteriorating

Columns   Page 1   of 2

Show
or hide
columns

Use the auto code feature to
automatically create case nodes to
represent the respondents

Navigate through
the pages of
records

Audio and video

You can import audio and video files that have been created in a variety of ways—for example, audio or video files that were recorded on your smart phone or files exported from QuickTime on your Mac. You can also import a transcript or transcribe in NVivo. You can open audio or video sources and work with them in Detail View:

Code directly on the timeline

Use these controls to interact with the media, for example, play, pause, skip around or adjust the speed.

Use these controls to interact with the transcript, for example, add or delete rows or play the media for a selected transcript entry.

Drag to resize the area for coding stripes

Select content and code it at a node

Photos and other images

You can import digital photos or other images and analyze them in NVivo.

A picture source consists of a picture and a text log.

Create a log to describe the picture (or just selected regions)

Code directly on the picture

Use these controls to interact with the picture, for example, zoom, adjust brightness or contrast, as well as assign the selected region to the selected log entry.

See the region that corresponds to the selected log entry

Use these controls to interact with the picture log, for example to add or delete a row.
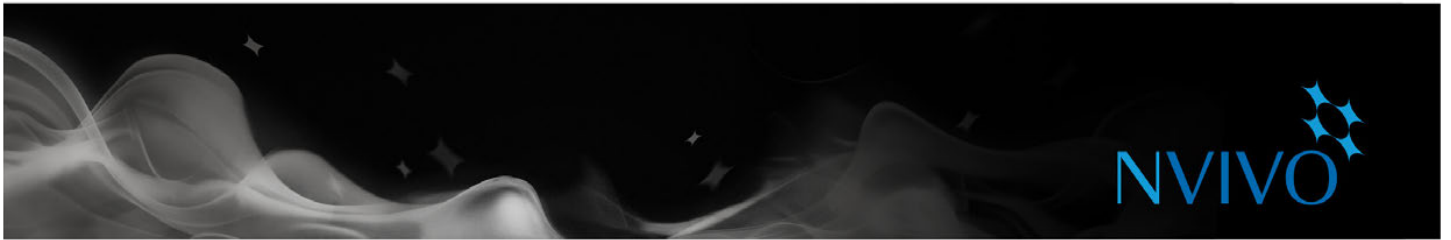
Web pages and social media

NCapture is a browser extension that lets you clip web pages and import them as PDF sources into your NVivo project.

Save a web page as an NCapture file

Import it as a PDF source

NCapture also enables you to capture social media conversations (from Facebook or Twitter)—and store them as PDF or dataset sources. Having content in a dataset means you can auto code—for example, you could gather Tweets by hashtag or location.

ID	Username	Tweet	Hashtags	Location	Number of Tweets	Number of Followers
2	Water_Angel.	Everyday when I wake up to the views of Cape Lookout I thank my lucky stars that I live in #CarteretCounty	CarteretCounty	Sea Level, NC	3,200	112
3	FerrymanOf72.	@Frank_B_Fishn. I agree it's over for #shrimp in #CarteretCounty 90% of the shrimp comes from Vietnam, Thialand and South America we can't compete	shrimp CarteretCounty	Straits, NC	743	69
4	WaveJump4.	@Frank_B_Fishn. It's a natural cycle, some years are good for #shrimp some years not so good. I've been is #CarteretCounty for 20 years.	shrimp CarteretCounty	Smyma, NC	325	21
5	WaveJump4.	@Frank_B_Fishn. I don't think theres a problem with #shrimp in #CarteretCounty Just look back two years ago - biggest harvest I've	shrimp CarteretCounty	Smyma, NC	324	21

Store social media content in a dataset

For Information about importing web pages or social media content, refer to the NVivo for Mac Help.

Create externals for the things you can't import

Externals are 'proxies' for the material you cannot import into NVivo such as books, or physical artifacts. You can create an external source (that looks like a document) and summarize the content of the item—for example, you might enter key points from a PowerPoint presentation or summarize the chapters in a book.

You can then code this content. If the external represents a file on your computer, you can create a link to the file and easily open it from within NVivo.

Bibliographical data

If you have conducted a literature review using EndNote X7 or earlier—you can export the data from the application as an EndNote XML file and import it into NVivo for Mac. The references are added as sources in your project and the bibliographical details are stored as 'source classifications' and attribute values.

Refer to the NVivo Help for more information about classifying your sources and working with bibliographical data.

Literature reviews in NVivo—keeping everything in one place

ideas

Using NVivo for your literature review can be a great way to learn the software and get started with a project. You can bring in your journal articles and:

- Organize them in a source folder—for example, called 'Literature'.
- Code each article to gather material by theme—you might also want to make nodes for 'statistics', 'good quotes' and 'definitions'.
- Use memos to describe the key themes and critique the articles.
- Use source classifications to assign bibliographical attributes like publication date and author
- Use a Text Search query to find relevant terms and explore the context in a word tree.
- Use a Word Frequency query to see what common terms are being used.

Understand nodes, cases and coding

You code your sources to gather material about a topic and store it in a container called a node. As you explore your sources, you select content and code it at a node.

When you open either type of node, you can see all the references in one place—allowing you to reflect on the data, develop your ideas, compare attitudes and discover patterns. See "Open a node to explore the references" on page 29.

Nodes

Nodes represent themes, topics, concepts, ideas, opinions or experiences. For example, you could code all references to *water quality* at the node:

Interview

Article

Report

Water quality node
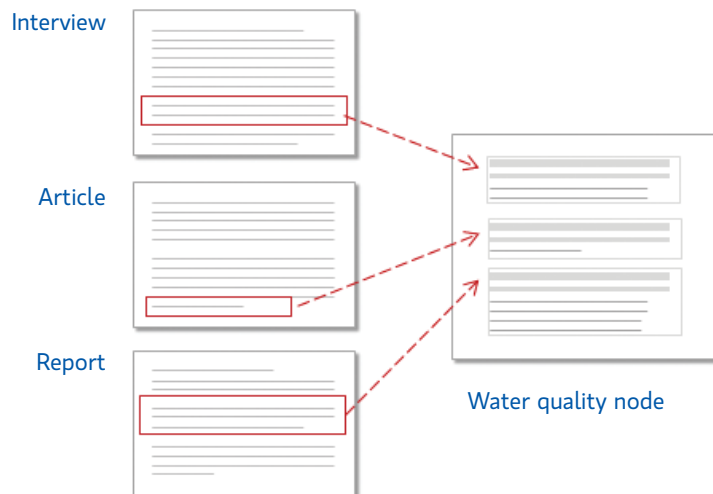
Case nodes

Cases represent your units of observation—a case might be a person, place, site, organization or any other entity.

Cases are a special type of node because you can classify them then assign attributes (variables) such as age, gender or location. As you code content at cases and nodes, you can use queries to ask meaningful questions—*How do young women respond to the challenge of climate change? Do their attitudes differ from those of older women?*
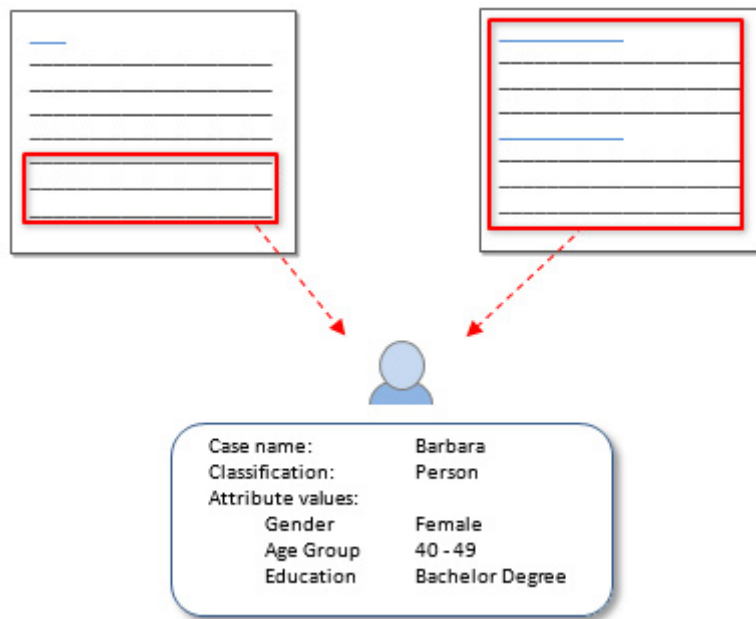
Barbara's case node

Working with nodes

Creating nodes

If you already know what themes you are looking for (based on your literature review, for example)—you can create and organize the nodes before you start coding:

1.   In the **Navigation View**, show **Nodes**.

2.   On the **Create** tab, in the **Nodes** group, click **Node**.

3.   Enter a name and description.

4.   Click **Done** and the new node is added to List View.

5.   You can add 'child' nodes (sub-nodes) under the new node and create a node hierarchy:

Alternatively, if you want to see what themes emerge from your sources, you can create nodes as you code. (Refer to "Code at nodes" on page 27.)

Creating node hierarchies

Organizing your nodes into a hierarchy is an important part of the analytical process, helping you to refine your thoughts and draw connections between themes.

Add 'child' nodes (sub-nodes) under an existing node to create a hierarchy. You can also drag & drop or cut & paste to move them around.

Click the disclosure triangle to expand the hierarchy

If the parent node has 'aggregation' turned on, any content coded at the child nodes is rolled-up into the parent node

As you code at the node, you can see the number of sources and references increase

| Name	Sources	References
Economy	24	302
Agriculture	8	20
Fishing or aquaculture	19	184
Jobs and cost of living	16	86
Tourism	6	11

Working with cases

Creating cases

You can create cases manually just like creating nodes. If you want to get the most out of your cases, consider classifying them and assigning attribute values.

In List View, you can select a source, then on the **Create** tab, in the **Items** group, click **Create as cases**—this action will create a case and code the entire source at the case node.
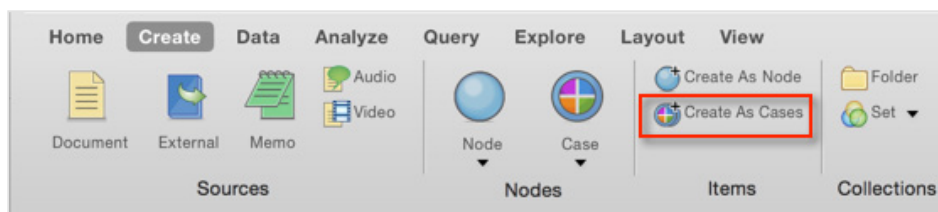
If you have a large number of cases, NVivo provides ways to speed the process up. For example, you could create cases from selected sources or by importing descriptive attributes from a text file.
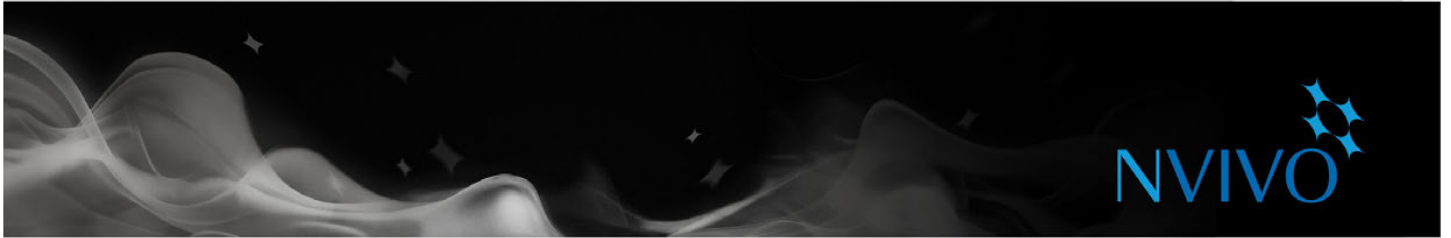
Understanding classifications and attributes

Use classifications to record descriptive information, like demographic details, about the cases in your project.

For example, if you have interviewed people in a particular community, you may want to collect information about their age, gender and occupation—and compare their responses based on these attributes.

To work with case classifications and attributes, you need to:

* Create a classification—for example, Person. You could also create classifications for different types of people, like students or teachers.

* Define attributes for the classification—for example, age and gender.

* Create a case then classify it and assign relevant attribute values to it—for example, 63 and female.
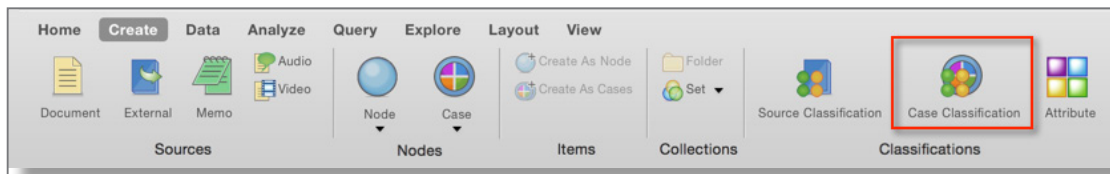
* Code content to the case.

Add case classifications to your project

Before you can classify cases, you need to add at least one case classification to your project:

1.   On the **Create** tab, in the **Classifications** group, click **Case Classification**.

2.   Enter a name for the classfication (for example, *Person*)—you can also enter a description.

3.   Click **Done**.

4.   To add attributes (for example, *age* or *gender*), select the classification and, on the **Create** tab in the **Classifications** group, click **Attribute**.

Classify a case

When you have created the classifications you need, you can classify your cases:

1.   In List View, select the case you want to classify.

2.   On the **Home** tab, in the **Item** group, click **Get Info**.

3.   If you cannot see the classification and attribute values, click the disclosure triangle to show them.

4.   For each attribute, you can select an existing value or enter a new one.

5.   Click **Done**.

Work with classification sheets

Classification sheets provide an overview of the items in a particular classification. For example, if you have created cases for interview respondents and classified them as *Person*, you can double-click on the classification to quickly see the spread of your respondents:

Apply filters to see a subset of your data

Click in a cell to update attribute values

Person				
Name ∧	Township ▽	Community ▽	Generations Do... ▽	Gender ▽
Barbara	🔍 Straits	🔍 Bettie	🔍 2	🔍 Female
Betty	🔍 Straits	🔍 Straits	🔍 3 or more	🔍 Female
Charles	🔍 Atlantic	🔍 Atlantic	🔍 1	🔍 Male
Daniel	🔍 Davis	🔍 Davis	🔍 2	🔍 Male
Dorothy	🔍 Smyrna	🔍 Williston	🔍 3 or more	🔍 Female
Helen	🔍 Straits	🔍 Otway	🔍 3 or more	🔍 Female
James	🔍 Marshallberg	🔍 Marshallberg	🔍 2	🔍 Male

You can import classification data from a text file. You can also export the data to use in other applications like SPSS. Refer to the NVivo for Mac Help for more information about importing and exporting classification data.

ideas

Exploring people, places and other cases

NVivo provides tools for exploring the cases in your project, for example you could:

- Use a coding query to gather content based on demographic attributes.

- Use a matrix coding query to compare respondent comments based on demographic attributes.

Views on local economy by gender	A : Person:Gender = Female	B : Person:Gender = Male
1 : Agriculture	10	3
2 : Fishing or aquaculture	25	26
3 : Jobs and cost of living	22	26
4 : Tourism	2	5

- Make a memo to record your thoughts and insights about the case.

Coding your source materials

You code your source materials to gather material about a topic and store it in nodes and cases.

Code at nodes

As you explore your sources, you can code at the nodes you have created:

1. Display your nodes in List View and open a source in Detail View. You may find it easier to code if you display Detail View on the right.

2. Select the content that you want to code. The content you can select depends on the type of source you are working with. Refer to the NVivo for Mac Help for information about coding in different source types.

3. Drag the selected content to the node.

You can also code by:

- Clicking options on the ribbon—on the **Analyze** tab, in the **Coding** group, under **Code Selection At**, click **Existing Nodes**.

- Using the shortcut menu—select the content, then hold down the Control key and click (you can also use your mouse or trackpad based on the preferences for secondary clicks).

- Using keyboard shortcuts—refer to the NVivo for Mac Help for more information about NVivo keyboard shortcuts.

ideas

Approaches to coding

The way you approach coding depends on your methodology and research design but here are some ideas to get started:

- Start with 'broad-brush' coding to organize the material into broad topic areas (use Text Search queries to help with this)—then explore the node for each topic and do more detailed coding. For example, gather content about *water quality* and then explore the node looking for interesting perceptions, contradictions or assumptions.

- Or, you could get straight into detailed coding (making nodes as you need them) and then, later on, combine and group your nodes into related categories.

- As you reflect on a piece of content, think about these different types of coding:

  - Topic coding—What is the topic being discussed? For example, *water quality, real estate development, tourism* and so on.

  - Descriptive or 'case' coding—Who is speaking? What place, organization or other entity is being observed.

  - Analytical coding—What is this content really about? Why is it interesting? Consider the meaning in context and express new ideas about the data.
    For example, *ideals vs reality, tension between developers and residents.*
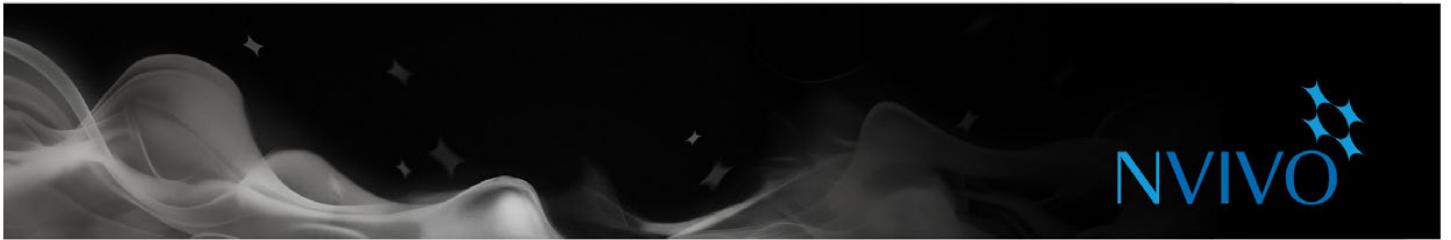
Create nodes as you code

As you explore your sources you can create and 'code at' new nodes:

1. Open a source in Detail View.

2. Select the content that you want to code. The content you can select depends on the type of source you are working with. Refer to the NVivo for Mac Help for information about coding in different source types.

3. On the **Analyze** tab, in the **Coding** group, under **Code Selection At**, click **New Node**.
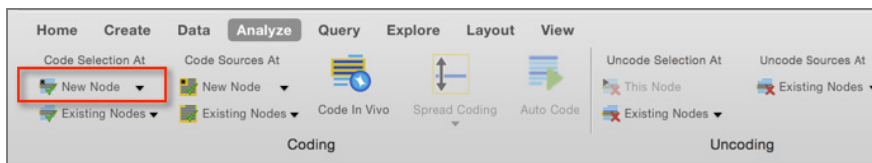
4. Enter a name—you can also enter a description or change the location for the new node.

5. Click **Done**.

When you create a new node it is added to the selected location in the node hierarchy.

## Make a node from a selected word

You can also use 'in vivo' coding to create and code at new nodes—the selected word or phrase is used to name the node and is (at the same time) coded at the node. This is useful if you want your nodes to reflect the language of the people you have interviewed.

1. Select the text content you want to code.

2. On the **Analyze** tab, in the **Coding** group, click **Code In Vivo**.

See what you have coded

To see what has been coded in a document you can:

- Turn on coding highlight—on the **View** tab in the **Coding** group, click Highlight, and then select a highlight option.

- Turn on coding stripes—on the **View** tab in the **Coding** group, click **Coding Stripes**, and then select an option. Coding stripes are displayed on the right of the source:
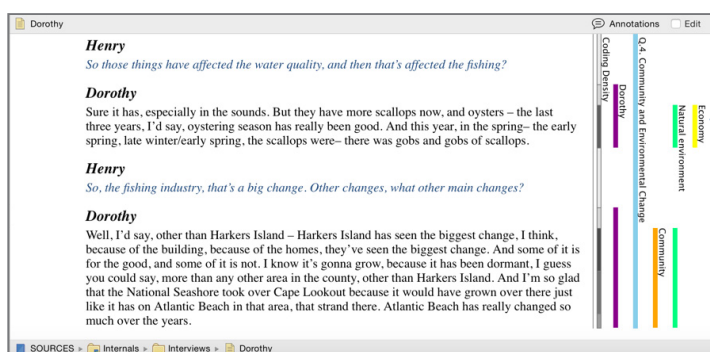
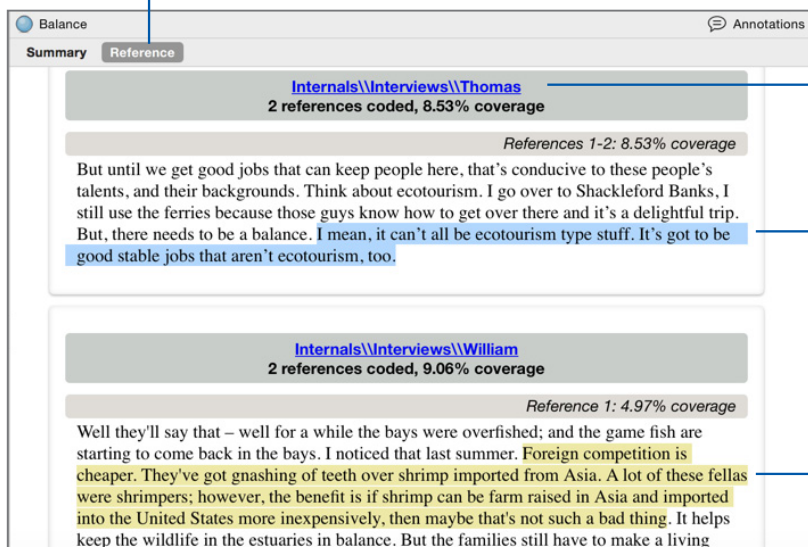You can right-click on a stripe to open a node, uncode or highlight coding
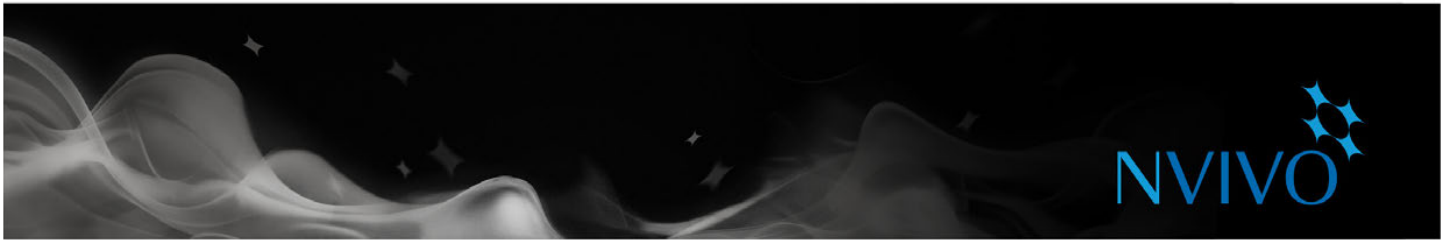
Open a node to explore the references

You can open a node to see related references gathered in one place:

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

2.   In List View, open the node you want to explore. The node is opened in Detail View:

The Reference pane shows all the text content coded at the node

You can see what sources were coded and click on the link to open a source

Select content and 'code on' to new nodes

Turn-on coding highlight to see where this node overlaps with others

Quick code with Text Search queries

You can use NVivo queries to automatically code your sources based on the words or phrases they contain. This can be a useful starting point for reviewing your data. For example, you could run a Text Search query on the word *balance* and automatically code all occurrences.

To create a Text Search query—on the **Query** tab, in the **Create** group, click **Text Search**.
Enter the word or phrase you want to search for and click **Run Query**—refer to the NVivo for Mac Help for detailed instructions.

You can visualize the results of a Text Search query in a Word Tree. This is a useful way to see how words are being used
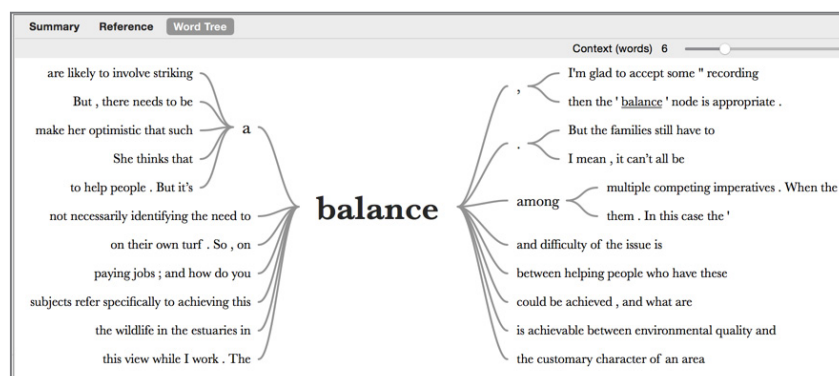
Quick coding datasets based on structure

Datasets can be quickly coded based on their structure. For example, if you have a dataset containing survey responses, you could auto code to gather all the answers to each question. Or, you could gather each respondent's answers into a case node that is also classified with their demographic attributes, such as age or gender.
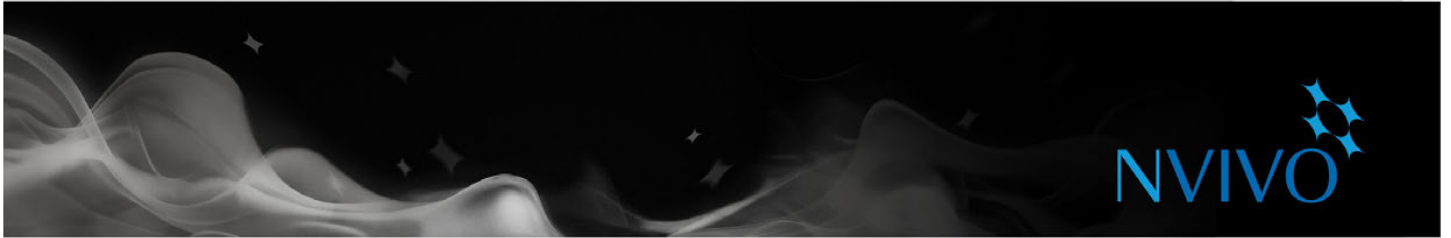

Coding tips

- Remember that you can code content at multiple nodes. For example, you could code Barbara's comment at all of the nodes shown in List View.

- If you code all your interviews like this, then you can use queries to gather your material in different combinations. For example, show me:

    - All the content coded at *water quality and development*

    - Negative attitudes about *water quality*

- If you find an interesting phrase or theme in one interview, you can use a Text Search query to see if it appears in the other interviews—and save the results as a node.

- After exploring and coding a source, take some time to reflect on what you have discovered and record your thoughts in a memo.

- You may not need to exhaustively code all your material. For example, if after working through twelve interviews you are not finding any new themes or ideas—you may have reached 'saturation'. You could use Text Search queries to do some broad-brush coding in subsequent interviews.

Memos and annotations

Memos are an integral part of the research process—and can be a great starting point when you come to writing-up your project. Memos are like documents and they can be linked to sources or nodes.

Creating a linked memo

To create a memo that is linked to a source or node:

1. Select the source or node in List View or open it in Detail View.

2. On the **Analyze** tab, in the **Links** group, click **Memo Link**, and then click **Link to New Memo**.

3. Enter a name for the memo.

4. (Optional) Enter a description of the memo.

5. Click **Done** and then enter your memo text.

Adding an annotation to selected content

Annotations are like scribbled notes in the margin—they let you record comments, reminders or observations about specific content in a document, PDF, memo or external.

To create an annotation:

1   Select the content you want to annotate.

2   On the **Analyze** tab, in the **Annotations** group, click **New Annotation**..

3   In the popup, enter the annotation.

Click here to view a list of all annotations in your source.
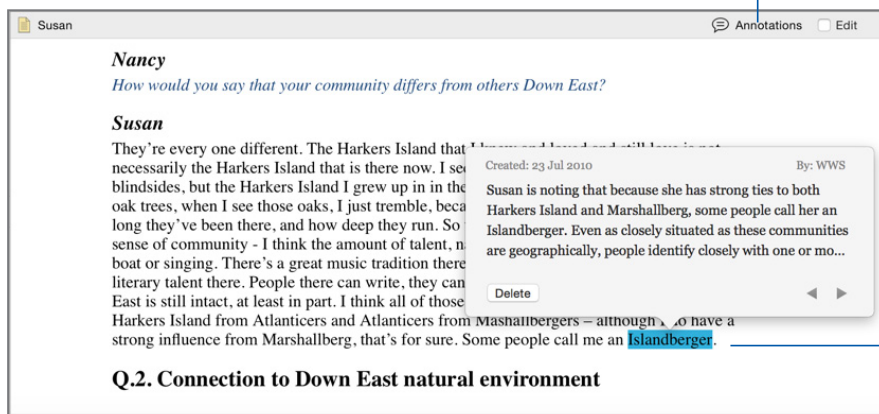
The annotated content is shaded with color. Hover to see the annotation in a popup.

All the annotations in your project are displayed the Annotations folder in the Collections group.

ideas

Memos—a crucial piece of the analytical puzzle

You can use memos to tell the story of your project—from your early ideas and assumptions to fully-fledged insights about a topic, person, or event. Use them to 'talk to yourself' as you make sense of your data.

Tracking your analytical process with memos can help you to increase the transparency and reliability of your findings. With your process recorded in memos, you can easily demonstrate the evolution of a theory or quickly call up data that supports client questions.

Memos are quite 'free form' in NVivo and our innovative users (from the LinkedIn NVivo Users Group) have come up with some great uses for them:

- **Project memo**—record your goals, assumptions and key decisions. Like a journal, update it regularly and include links to the significant nodes and sources.

- **Interview or participant memo**—summarize the key points of an interview. Make note of contradictions, surprises or early hunches. Include ideas about the nodes you might make and include descriptive information about the interview setting.

- **Node memo**—explain why you think a theme is significant (especially useful in team projects). Add to the memo as your thinking evolves and include links to the related literature. By writing as you go, you won't face the pressure of staring at a blank document when it comes to writing up your project.

- **Query results memo**—what do these query results tell me? Make a memo to organize your ideas and to plan future steps.

- **Analytical and procedural memos**—record your findings in analytical memos and use procedural memos to document the methodological steps you take.

- **NVivo memo**—record what works best in the software, including any tips or shortcuts you want to remember. Include links to NVivo-related support materials that you've found on the web.
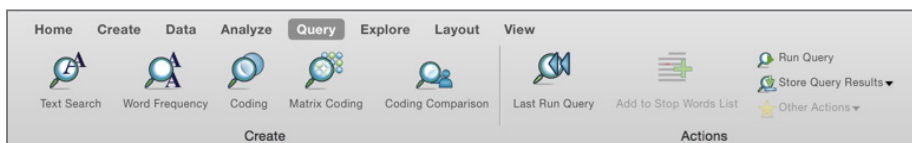
Bring it all together with queries

You can use NVivo queries to:

- Find and analyze the words or phrases in your sources and nodes. You can find specific words or those that occur most frequently.

- Ask questions and find patterns based on your coding and review your progress.

You can work with queries using the **Query** tab:

Use queries for text analysis

You can explore the text in your sources using the following queries:

- **Text Search query**: search for a word or phrase in your source material and view all the matches in a preview node—and save the results in a node. You can also visualize the results in a Word Tree.

- **Word Frequency query**: list the most frequently occurring words in your source material and visualize the results in a word cloud.

Display results in a word cloud, double-click a word to find all occurrences

Click here to choose from a gallery of styles
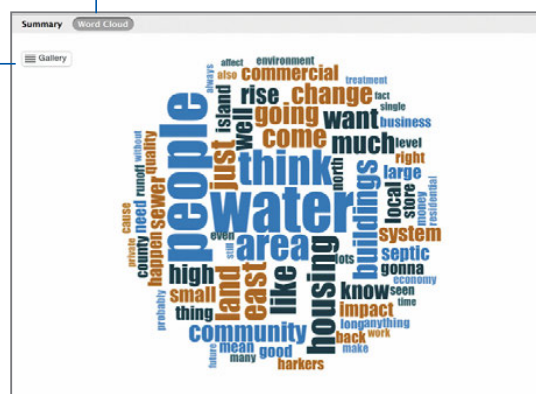
Use queries to explore your coding

You can review and explore your coding using:

- **Coding query:** gather all the coding at any combination of nodes—for example, gather and explore all content coded at water quality and tourism.

- **Matrix Coding query:** creates a matrix of nodes based on search criteria. For example, show me participant attitudes towards agriculture, fishing or tourism.

- **Coding Comparison query:** enables you to compare coding done by two users or two groups of users.

ideas

Making the most of queries

Start running queries early on in the coding process—they can help you focus on the questions you want to ask (and prompt you to code accordingly). For example, if you want to ask "How does real estate development impact water quality"—make sure you code at the node for water quality and code at the node real estate development.

- Use coding queries to build-up and test ideas. For example, you have a hunch that people's perception of water quality is closely tied to the pace of development. Create a Coding query to gather all material coded at water quality and coded at 'development'.

- Use matrix coding queries to cross-tabulate coding. For example, compare participant attitudes towards their local environment.

Attitudes towards environment	A : Positive	B : Mixed	C : Negative
1 : Environmental change	2	2	9
2 : Environmental impacts	0	0	2
3 : Habitat	0	1	3
4 : Landscape	8	0	0
5 : Water quality	2	0	3

- Make a memo to record what you learn from a query—this can prompt you to ask further questions and facilitate deeper analysis. Link the memo to the query results.

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