



# *NVivo: 12Pro*

## *Essentials for Getting Started*

### *Qualitative Data Analysis*

#### **Course objectives:**

Making content into data

- Create a Project
- Working with Documents and Datasets
- Understand coding nodes and cases
- Explore and analyse data
- Use Visualisation tools

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#### **Student Training and Support**

Phone: (07) 334 64312  
Email: [askus@library.uq.edu.au](mailto:askus@library.uq.edu.au)  
Web: <https://web.library.uq.edu.au/library-services/training/>

#### **Service Points**

St Lucia: Main desk of the Central, ARMUS and DHESL libraries  
Hospitals: Main desk of the PACE, Herston and Mater libraries  
Gatton: Level 2, UQ Gatton Library

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#### **Staff Training (Bookings)**

Phone (07) 3365 2666  
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Web <http://www.uq.edu.au/staffdevelopment>

Staff may contact their trainer with enquiries and feedback related to training content. Please contact Staff Development for booking enquiries or your local I.T. support for general technical enquiries.



## Table of Contents

<b>NVIVO: 12Pro</b> .....	<b>3</b>
Exercise 1.    Access NVIVO.....	3
<b>Getting Started</b> .....	<b>3</b>
Exercise 2.    Create a new project .....	3
<b>The NVIVO interface</b> .....	<b>4</b>
Exercise 3.    Building a Mind Map .....	4
Exercise 4.    Open a project .....	6
Exercise 5.    Nodes from a Mindmap.....	7
Exercise 6.    Add file structure.....	8
<b>Working with Data</b> .....	<b>8</b>
Exercise 7.    Prepare Content .....	8
Exercise 8.    Import Content.....	9
<b>Coding Nodes and Cases</b> .....	<b>11</b>
Exercise 9.    Coding to new nodes .....	11
Exercise 10.   Display Coding .....	12
Exercise 11.   Coding to existing nodes.....	12
Exercise 12.   View Node Coding .....	13
Exercise 13.   Auto Coding – Nodes .....	13
Exercise 14.   View Node References .....	14
Exercise 15.   Merge Nodes .....	15
Exercise 16.   Auto coding - Cases .....	15
Exercise 17.   Survey results and other datasets.....	17
<b>Querying Data</b> .....	<b>20</b>
Exercise 18.   Create a Matrix Coding Query .....	20
Exercise 19.   ‘Word Frequency’ Query .....	22
Exercise 20.   Create a Word Query.....	23
<b>Visualisation Tools</b> .....	<b>25</b>
Exercise 21.   Diagrams.....	25
<b>Extension Exercises</b> .....	<b>27</b>
Memos, annotations and links .....	27
Exercise 22.   Create a Memo .....	27
Exercise 23.   Link a Memo .....	27
Exercise 24.   Annotations .....	28
Exercise 25.   Adding a “see also” link .....	29

**Exercise files:** Go to <https://web.library.uq.edu.au/library-services/training/training-resources>

## NVIVO: 12Pro

NVIVO is designed to facilitate common qualitative techniques for organising, analysing and sharing data in a research project. NVivo can help you manage, explore and discover patterns in your data but it cannot replace your analytical expertise.

### Exercise 1.

### Access NVIVO

1. Double-click the **Nvivo 12** icon

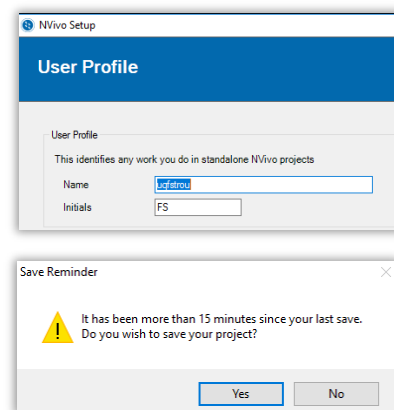


2. Complete profile details, if prompted
3. Add your initials.

These will be used to identify your edits as you progress

4. Click on **OK**

During your session you will receive on-screen prompts to save your progress. The save time can be changed via **File (tab) – Options – Notifications (tab)**

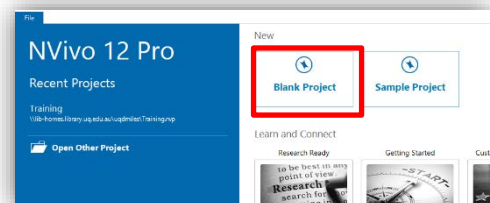


## Getting Started

### Exercise 2.

### Create a new project

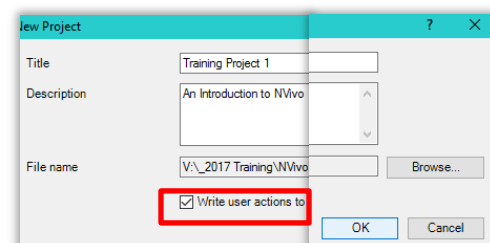
1. Click on the **Blank project** option



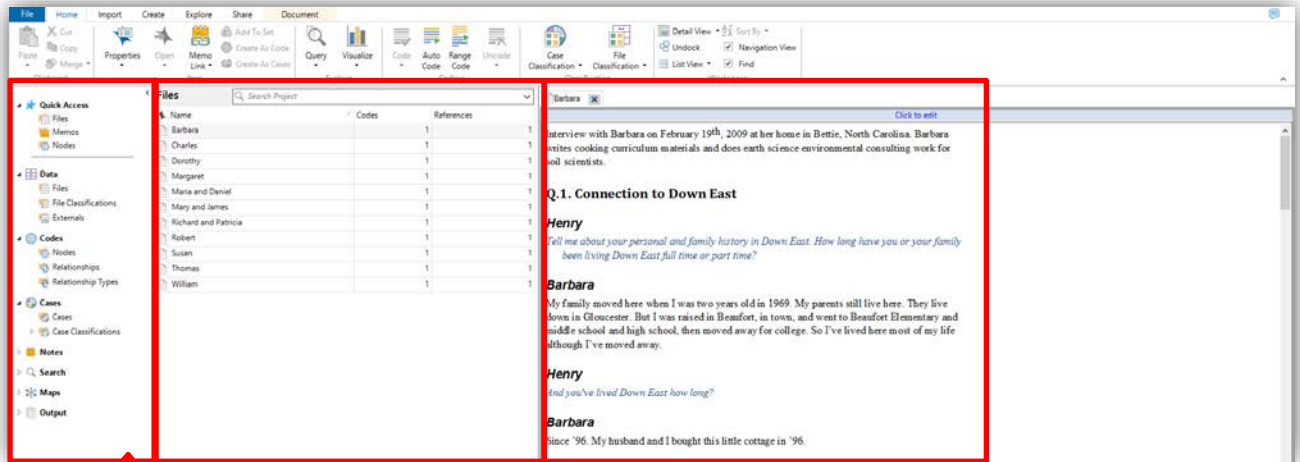
2. Complete project details
3. Click **Browse** to save project to your preferred location.

**Note:** If you are collaborating with other users it is advisable to tick the checkbox to Write user actions to project event log

4. Click on **OK**



## The NVIVO interface



Navigation View

List View

Details View

### Exercise 3.

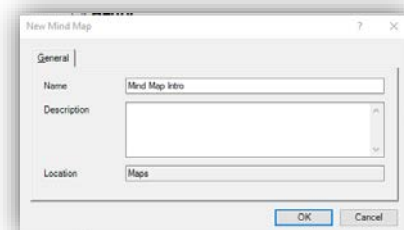
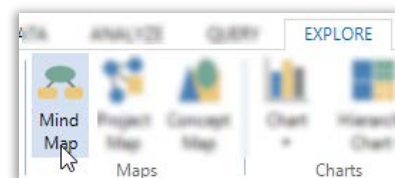
### Building a Mind Map

When considering topics that may be present in your data you can create a mind map to visually explore potential concepts. These can be used as a brainstorming tool for Planning your node hierarchy, during analysis to explore how people talk about a topic or to plan how you will tell the story of your research.

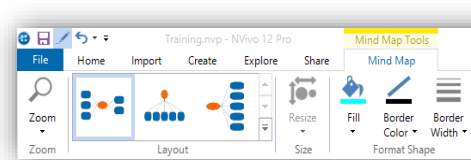
#### a. Create a Mind map

1. Click on the Explore tab and click **Mind Map**
2. Enter a Name: **Mind Map Intro**
3. Add a **Description** (Optional)
4. Click on **OK**

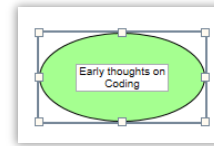
Note the location "Maps" found in the Navigation view towards the bottom



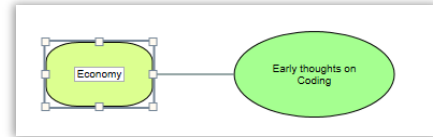
A new tab for Mind Map tools will appear in the ribbon



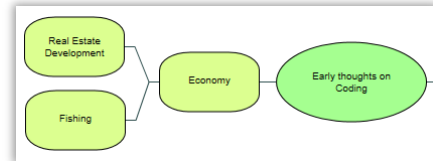
- Double click map **Core Idea** to enter text  
**“Early thoughts on coding”**



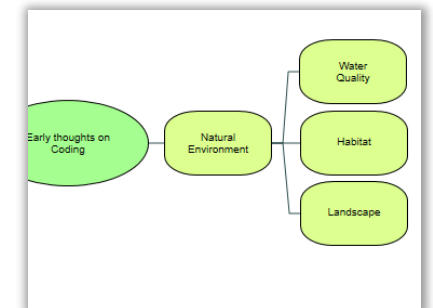
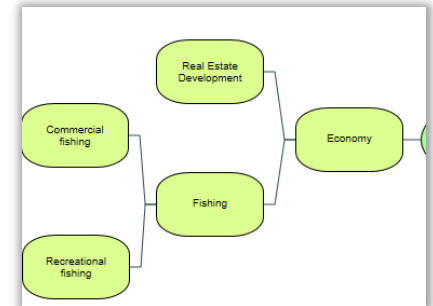
- Click on **Child Idea** button
- Add the text **Economy**
- Repeat* step 6 to add the child idea **Real Estate Development** to the Economy idea



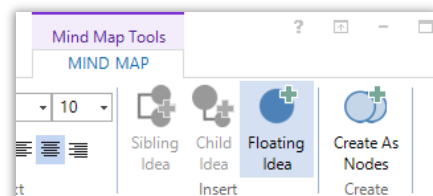
- Click on the **Sibling Idea** button
- Add the text **Fishing**



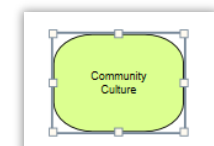
- Continue to create the Mind Map as shown:
  - Select Fishing:* Add **Child** = Commercial Fishing
  - Select Commercial Fishing:* Add **Sibling** = Recreational Fishing
  - Select core object:* Add **Child** = Natural Environment
  - Select Natural Environment:* Add **Child** = Water Quality
  - Select Water quality:* Add **Sibling** = Habitat
  - Add Sibling* = Landscape



- Click the **Floating Idea** Button on the Mind Map tab



- Add the text **Community Culture**

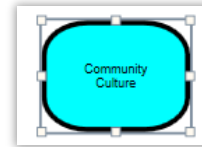
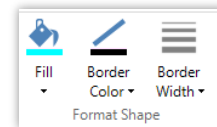


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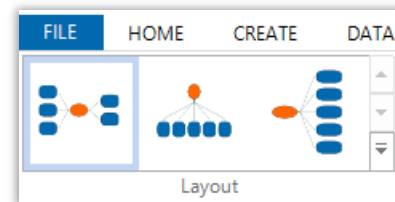
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3. Click on the **Fill** button
4. Click on the **Border Colour** button
5. Click on the **Border Width** button
6. Select a wider border for the idea object

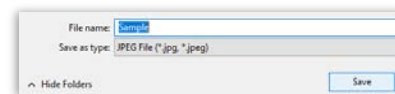
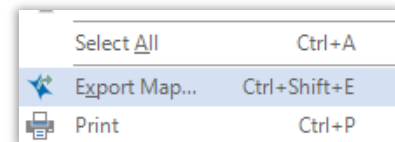


7. Select a **layout** for the **Mind Map** in the ribbon



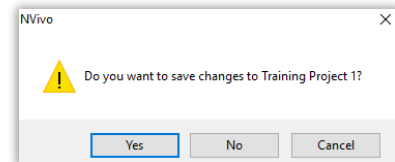
#### b. Mind Map Output

1. Right click in mind map area
  2. Select **Export Map**
- Alternatively**
- Click **Share** tab - **Export**
3. Enter details to save Mind Map as a static image
  4. Click on **Save**



5. Click on **File** in ribbon
6. Select **Close**

Save project if prompted



### Exercise 4.

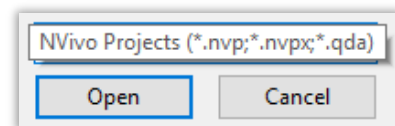
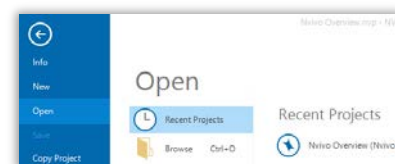
### Open a project

A standalone project is a **.nvp** file saved on your computer or on a network drive.

1. Click the **File** tab
2. Click **Open**.

**Note:** Ensure **NVivo Projects** from the **File** or **Project type** list is displayed

3. Locate and select project you want to open.
4. Click **Open**.



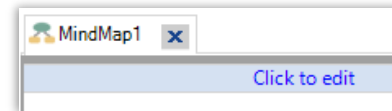
## Exercise 5.

## Nodes from a Mindmap

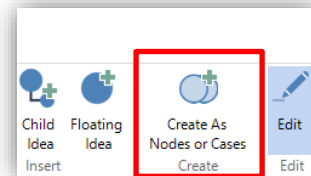
Nodes are like containers that hold all the content about a particular theme or topic in your project

### a. Create Nodes from a mindmap

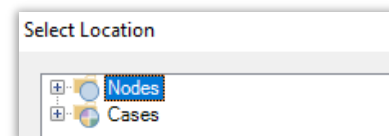
1. Open **Training Project 1**
2. Go to **Maps**
3. Double click **MindMap Intro**



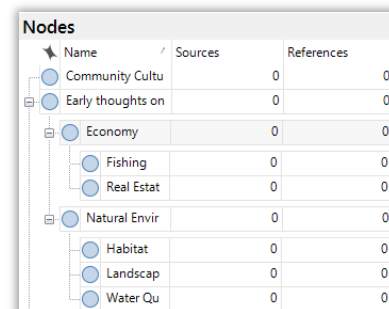
4. On the Mind Map tab - click **Create as Nodes or Cases**



5. Select the **Nodes** folder
6. Click on **OK**



7. Click on **Nodes** in Navigation view  
Empty nodes are created based on the Mind Map structure.

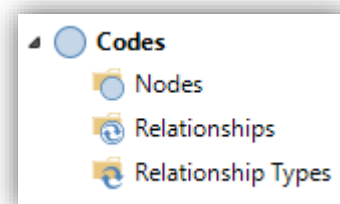
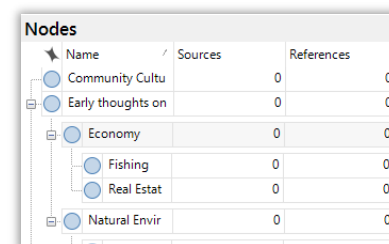


- b. **Edit Nodes** - Nodes can be deleted or re-arranged. If a parent node is to be deleted but the child nodes retained, the child nodes need to be allocated a new parent node in the first instance.

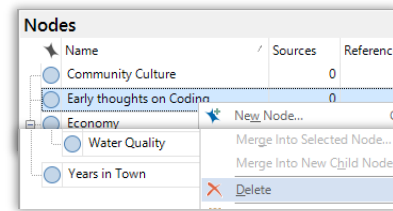
If we wish to delete the Early thoughts on Coding node we will need to re-allocate all the child nodes below it.

1. Click on **Economy** node
2. Hold Ctrl and Click on **Natural environment** node
3. Drag these selected nodes over the Nodes folder in the Codes area of the Navigation View

Note: If you drag into the Quick Access area at the top of the Navigation view you will create Shortcuts to the nodes. If you do this and wish to remove the shortcut right mouse click the shortcuts and choose Remove from Quick Access



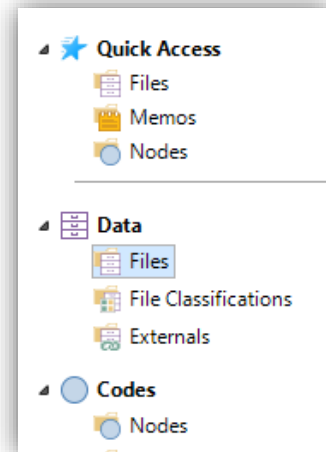
4. Right click on the **Early thoughts on coding** node in the List View
5. Select **Delete**
6. Click on **Yes** to confirm deletion



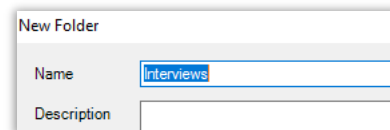
## Exercise 6.

## Add file structure

1. Navigate to **Data**
2. Right Click **Files**
3. Select New Folder



4. Enter **Interviews** in the Name area
5. Repeat for **Survey Data**



## Working with Data

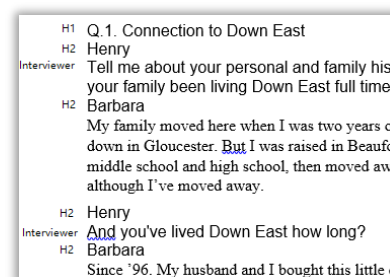
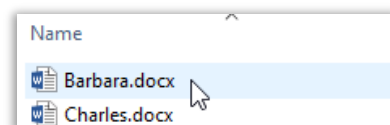
## Exercise 7.

## Prepare Content



This exercise uses Microsoft word and is preparation of data prior to importing into a project although styles can be added to a document within NVivo

1. Open **Barbara.docx** in Interviews folder in File Explorer
2. Apply heading styles to the Interview text:
  - Heading 1 – Question 1
  - Heading 2 – Names (Henry and Barbara)
  - Interviewer – Questions asked




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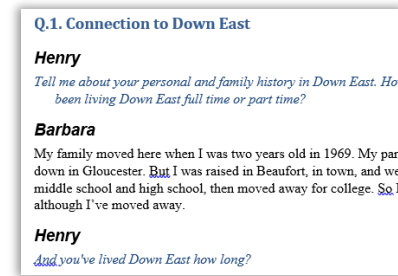


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### 3. Save and Close **Barbara.docx**

Adding styles to your text in Microsoft word can improve how it is coded in NVivo

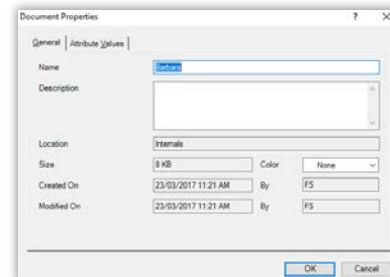
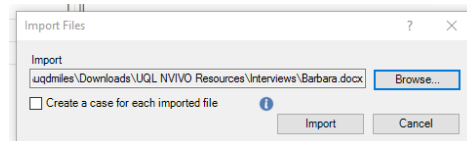
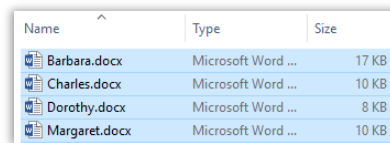
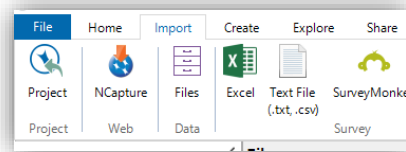


## Exercise 8.

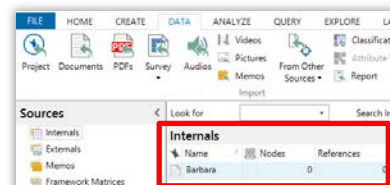
## Import Content

### a. Bring in a document

1. Select **Interviews** folder
2. Click the **Import** tab
3. Click the **Files** button
4. From the downloaded course files: Select All interviews in interviews folder
5. Click on **Open**
6. Click on **Import**
7. Click on **OK** in the Document Properties window, if required

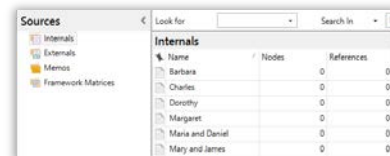


**Note:** Your files are added to the interviews folder



### 8. Doubleclick an interviewee to view content

As you access each source it will display in a tab of its own in the detail view pane. Click the cross to close a tab





## Coding Nodes and Cases

Coding allows you to organize your sources for later data analysis. Applying coding to your content will organise text into certain nodes/containers. This is the start of the process to make your content into data. There are two approaches to *coding* source content

- 1 Organise the data into broad topics then explore your nodes for each topic and do further coding
- 2 Perform detailed coding as you go through sources, creating nodes as you need them and later combining or grouping nodes into related categories.

### Exercise 9.

### Coding to new nodes

#### a. Code data manually

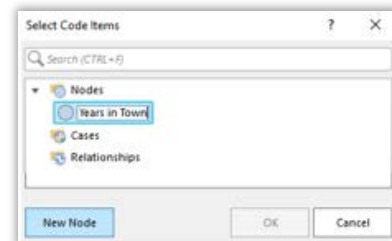
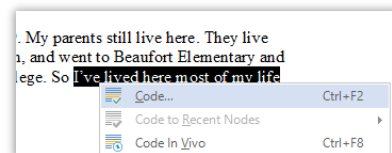
1. Double click to view the details of an interview (*Barbara*)
2. Highlight a line of text
3. Right click the selection
4. Select **Code**
5. **Alternatively**
6. Click **Code** on the **Document** tab
7. Click the **New Node** button
8. Enter a name for the node '**Years in Town**'
9. Click on **OK**

Check the list of Data - Files. Coding has been added to the first interview

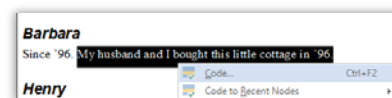
10. Repeat for another line of text
11. Add to the '**Years in Town**' node

Check the list of Data - Files.

12. Open another interview (*Charles*)
13. Navigate to **Nodes**
14. Select text
15. Drag over node '**Years in town**'
16. Repeat for another interview – (*Dorothy*)



Name	Codes	References
Barbara	2	
Charles	1	

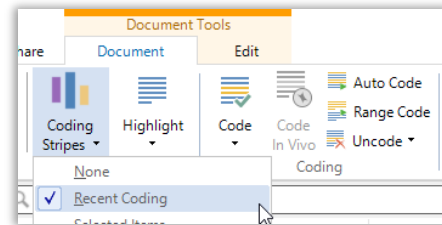


## Exercise 10.

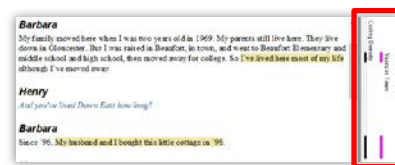
## Display Coding

This setting only applies to the data currently in view. It is not a global setting and will have to be switched on/off, as required, for every source opened.

1. Go to the **Document Tools - Document Tab**
2. Click on **Coding Stripes**
3. Select **Recent Coding**

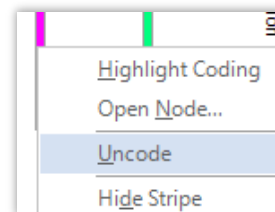


The **coding density** will display and the node will show with a bar to identify each reference. Click on the coding stripe to highlight your coding in the document



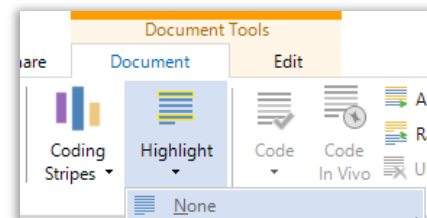
### a. Remove code

1. Right click on a coding stripe
2. Select **Uncode**



### b. Remove highlight

3. Go to the **Document Tools - Document Tab**
4. Click on the **Highlight** button
5. Select **None**

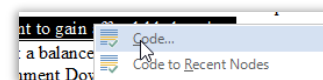


## Exercise 11.

## Coding to existing nodes

### a. Code documents

1. Navigate to **Data - Files**
2. Open a few interviews
3. Select some text
4. Right click on selected text
5. Select **Code...**



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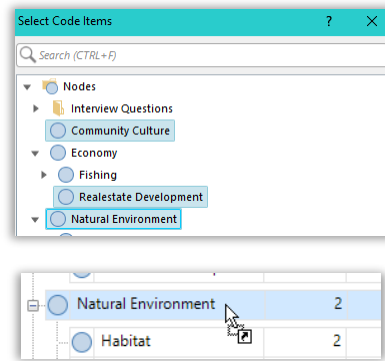
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6. Hold Ctrl key to select nodes:
  - *Community Culture*
  - *Realestate Development*
  - *Natural Environment*

7. Click on **OK**

Check the Node hierarchy, coding has been added to the appropriate nodes

8. Repeat for other interview responses



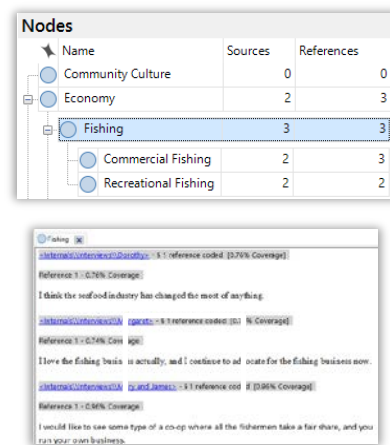
## Exercise 12.

## View Node Coding

1. Go to **Nodes**
2. Double Click to open **Fishing**

3. The node content will display each reference under a source link

The amount of the source coded is shown as a percentage. Click the blue link to open the source and view the coding



## Exercise 13.

## Auto Coding – Nodes



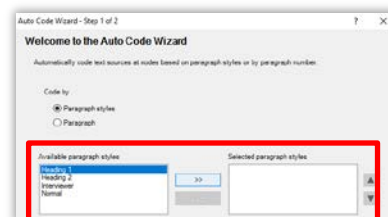
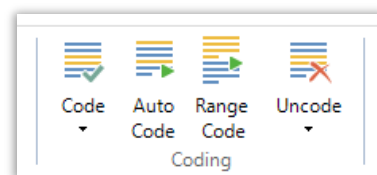
Please be aware this Autocoding in this way only works when using a PC. Autocoding is only available for Datasets (set out in columns and rows) if you use a MAC.

### a. Based on structure

Autocoding by structure works based on styles, and the use of consistent use of styles is critical.

**What we'd like to code are the responses to each question** - In the sample data each question has the *Heading 1* style applied and we can use this to autocode.

1. Navigate to **Data - Files**
2. Select all the interviews
3. Go to the **Home** tab
4. Click on **Auto Code**
5. Autor Code Wizard will launch
6. Choose Paragraph styles and click Next
7. Click on the style to be coded - **Heading 1**
8. Click the >> arrows to transfer right



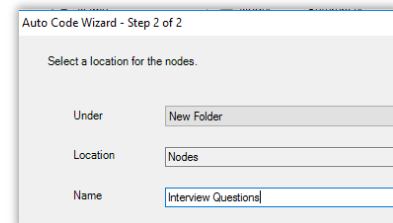
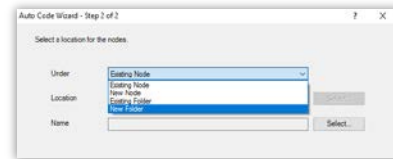
9. Click on **Next**

10. Click the **Under** field

11. Select **New Folder**

12. Add a name - **Interview Questions**

13. Click on **Finish**

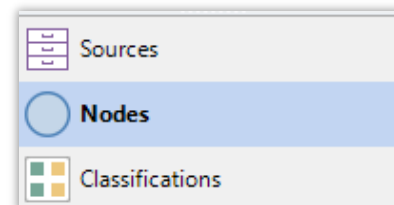


## Exercise 14.

## View Node References

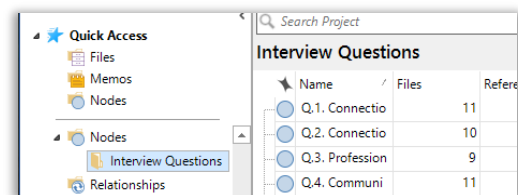
1. Click **Nodes** in the Navigation view

Double-click Nodes to expand if necessary



2. Click on **Interview Questions**

References will be displayed in detail view



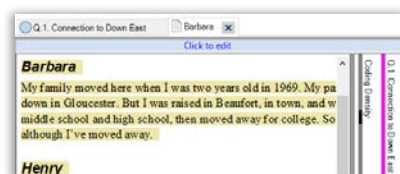
3. Double click on a question node

Content will be displayed in the Details View



4. Click on the source link at the top of each reference to open the source

5. Scroll through the node questions to see the other coded source content

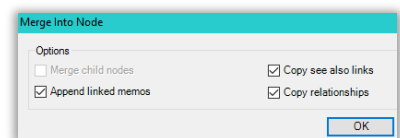
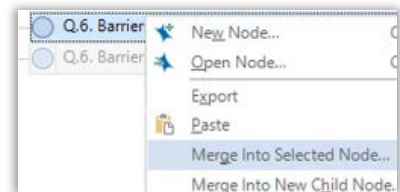
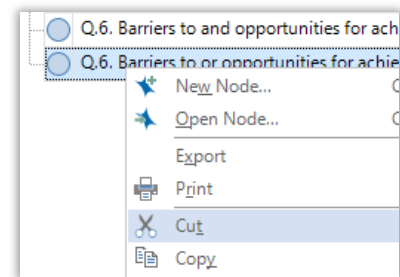


## Exercise 15.

## Merge Nodes

1. Right click on the last question in **Nodes/Interview Questions**
2. Select **Cut**
  
3. Right click on the last Q.6.
4. Select **Merge into Selected Node**
  
5. Click on **OK**

Check the sources and references totals have been merged



## Working with Cases

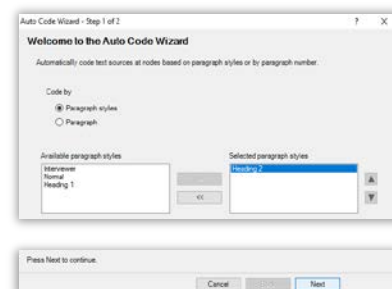
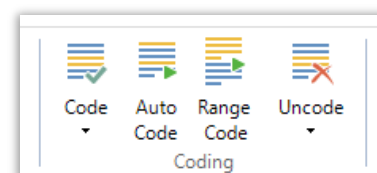
## Exercise 16.

## Auto coding - Cases

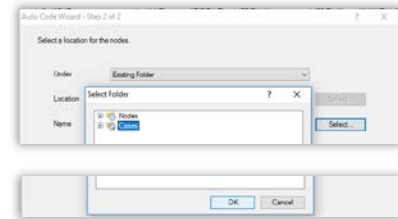
Cases are simply a different type of Node or container. Cases can help keep all data related to a given participant in one place. eg If you are doing a longitudinal study or are working with demographic data.

**What we'd like to code is every interviewee as a case** – in the interview documents each speaker has the heading 2 style applied to their name

1. Select all the interviews in Data - Files
2. Go to the **Home** tab
3. Click on **Auto Code**
4. Choose **Paragraph styles** from the Auto Code Wizard
  
5. Click on **Heading 1**
6. Click the << arrows to transfer left
7. Click on the style to be coded - **Heading 2**
8. Click the >> arrows to transfer right
9. Click on **Next**

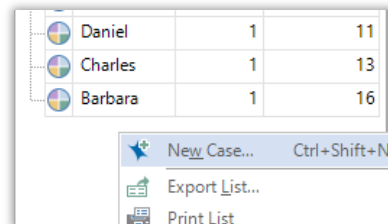


10. Click the **Under** field
11. Select **Existing Folder**
12. Click on **Select...** next to the Name field
13. Select **Cases**
14. Click on **OK**
15. Click on **Finish**

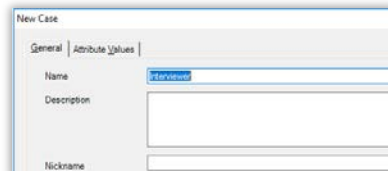


#### b. Case organisation - Parent Node

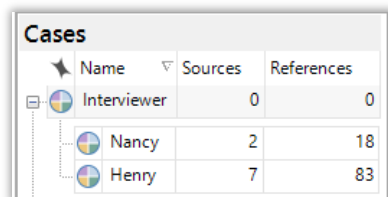
1. Navigate to **Cases** in the navigator
2. Right click below list of case names
3. Select **New Case**



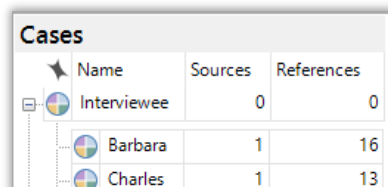
4. Add name – **Interviewer**
5. Repeat steps 1-3 for **Interviewee**



6. Click on the marker alongside **Henry**
7. Drag over **Interviewer**
8. Repeat for **Nancy, Linda and Elizabeth**

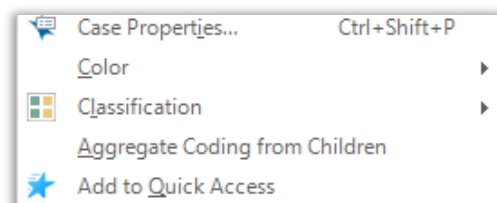


9. Hold CTRL to select all other case names
10. Drag selection over Interviewee



#### c. Aggregation of data

1. Right click on the **Interviewer** case
2. Select **Aggregate coding from children**  
The totals for child sources and references will be displayed.
3. Repeat for the **Interviewee** case  
This is a toggle option repeat to hide aggregation.





## Exercise 17.

## Survey results and other datasets

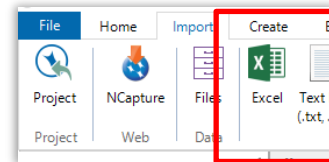


You **cannot** edit the contents of a dataset once it is imported

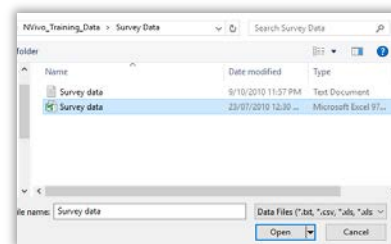
A dataset contains structured data arranged in columns and rows. One method of creating a new dataset in NVIVO is to import it from a spreadsheet, text file or database file.

### a. Bring in survey data

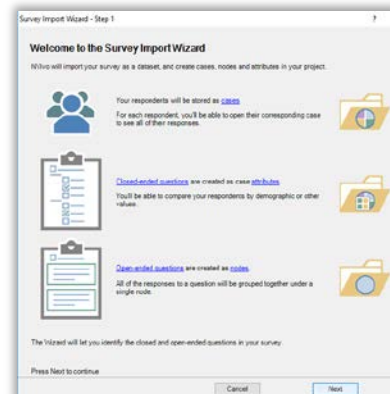
1. Navigate to **Data - Files**
2. Click the **Survey Data** folder
3. Click on the **Excel** button on the **Import** tab



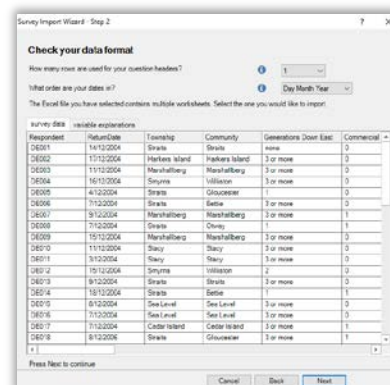
4. Select **Survey data.xlsx**
5. Click on **Open**



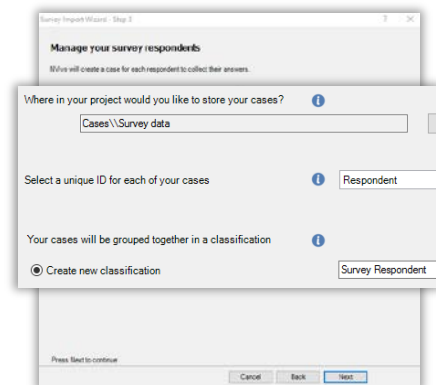
6. Confirm the survey wizard settings:
  - a. Respondents will be **cases**
  - b. Closed questions have **attributes**
  - c. Open questions are **nodes**
7. Click on **Next**



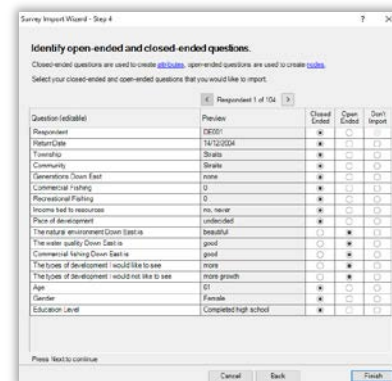
8. Check and confirm:
  - Question headers
  - Date format
  - The worksheet tab for data
9. Click on **Next**



10. Confirm the destination for dataset cases
11. Indicate the column for a unique identifier for each item
12. Select **Create new classification**
13. Click on **Next**

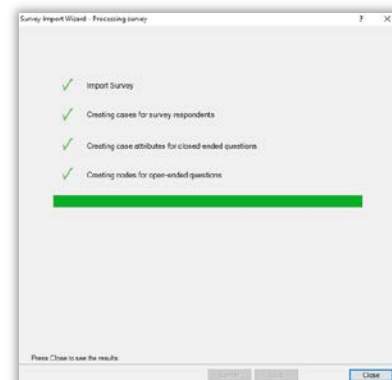


14. Identify data questions type and import status
15. Click on **Finish**



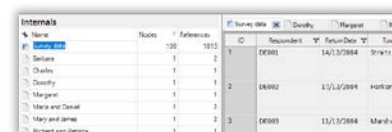
Survey import results should all be checked

16. Click on **Close** to display data in details view



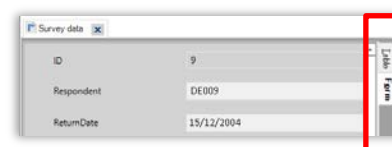
Data will display as an internal source and in list view  
You cannot sort or filter by the first column. This is NVIVO's own added reference.

Grey shaded columns are closed ended questions (**Classifying data**)  
White shaded columns are open ended responses (**Codable data**)



Survey data can be viewed in a table or by individual forms

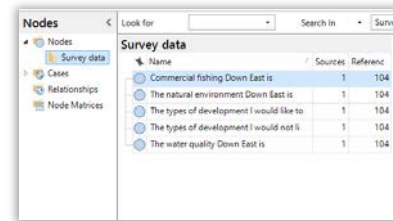
17. Select the appropriate tab to change the view



## b. Viewing imported Survey Dataset - Nodes

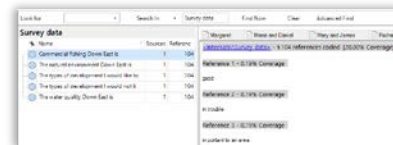
1. Click on **Nodes** in Navigation Pane
2. Select **Survey Data** under Nodes

This displays the open ended questions the respondents were asked



3. Double click the first node to display references in **Detail view**

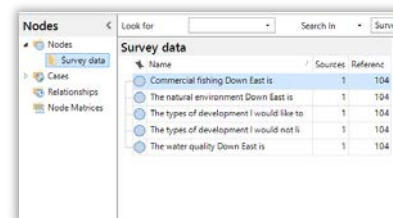
Remember each Node will open in a new tab



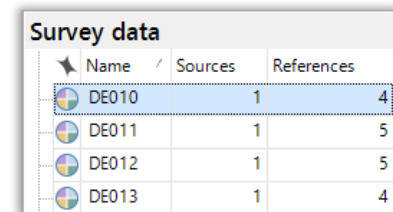
## a. Viewing imported Survey Dataset - Cases

1. Click on **Nodes** in Navigation Pane
2. Select **Survey Data in Cases**

This displays each respondent as a case and the references created from their open ended responses

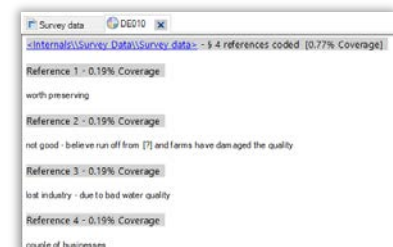


3. Double click a case with 4 references to display references in **Detail view**



The references will be listed and the original can be displayed

4. Click the source link



5. Click the **Form** tab

The responses can be viewed in detail.



## Querying Data

### Exercise 18.

### Create a Matrix Coding Query

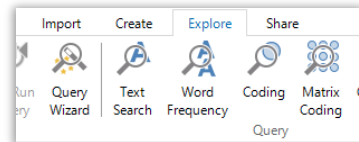
Matrix coding query can easily compare coded material across different demographics or among themes. This can help you see patterns in your data and help you answer questions about your research. We can look at the intersect between *nodes* and *classification attributes*.

#### a. Matrix Query – Do different genders view development differently?

1. Click **Query Wizard** on the Explore tab

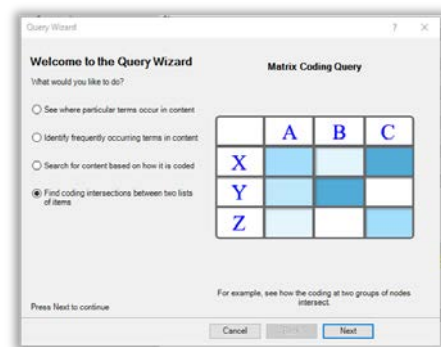
The Query Wizard opens

Note: If you choose Matrix Coding you need to create the Matrix Query without the wizard



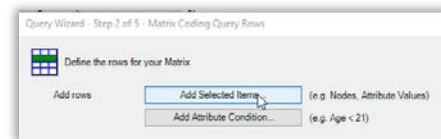
2. Choose Find coding intersections between two lists of items

3. Click next



4. Click the **Add Selected Items...** button

Create a row for each gender value - *Female & Male only*

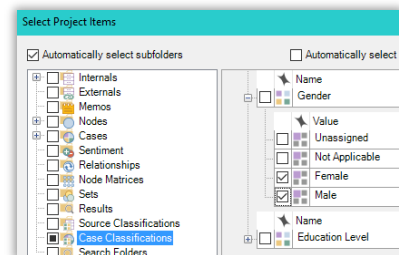


5. Click the **case classifications** text

6. Expand Survey respondents then expand **Gender**

7. Select **Male** and **Female**

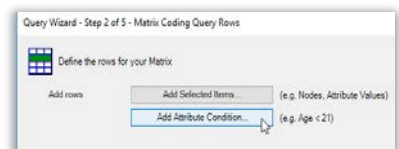
Case nodes represent attributes for people or places in the content



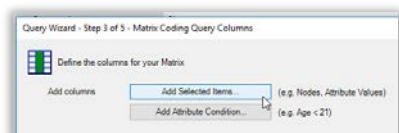
8. Click on **OK**

9. Click on the **Add Attribute Condition...** button and select an Attribute if necessary

10. Click Next



11. Click Add Selected Items



11. Select the theme nodes for the Survey Data to cross tabulate in your matrix.

Theme nodes represent coded text in the content  
Nodes > Survey Data > *Select three questions*

12. Click on **OK**

13. Click **Next**

14. Search in: **Files & Externals**

15. Click **Next**

16. Select Add this Query to Project

17. Select Name and enter name e.g. Matrix Query practice

18. Enter Optional Description if you wish

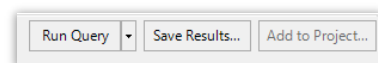
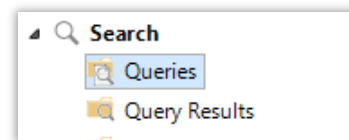
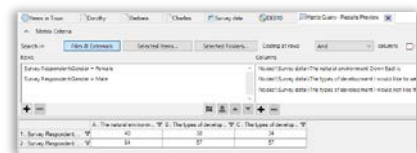
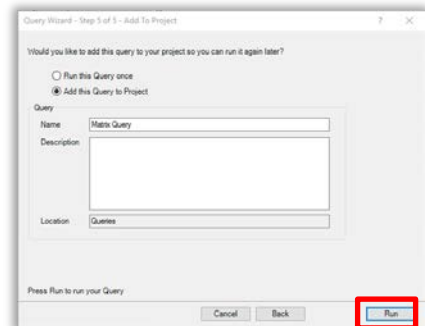
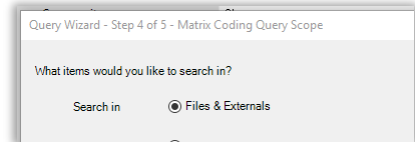
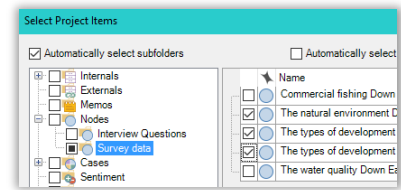
19. Click on **Run**

If you click **OK** you don't actually query the data.

20. The query results are displayed in the Matrix Query – Results Preview tab in the Details view

21. You can run the query anytime from **Search - Queries** in the Navigation view pane.

22. To save the query results use **Save Results...** button on the Matrix Query – Results Preview page (top right)

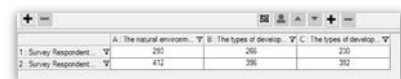
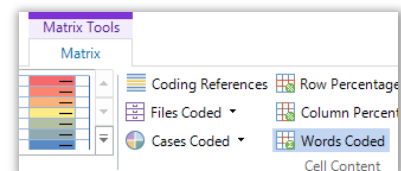


## b. Viewing and amending matrix results

1. Click **Matrix Tools – Matrix Tab**

2. Select **Words Coded**

The number of words coded by each gender for each question will be displayed.

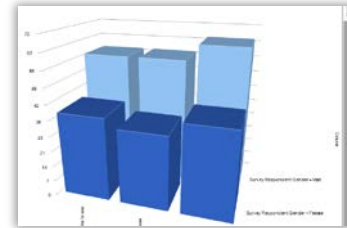


3. Double click on any number to see the coded references



4. Select the **Matrix Query – Results Preview** tab

5. Click the **Chart** tab at the right side of the screen

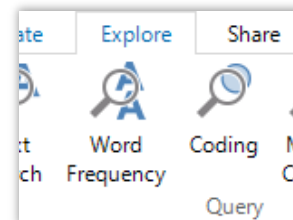


## Exercise 19.

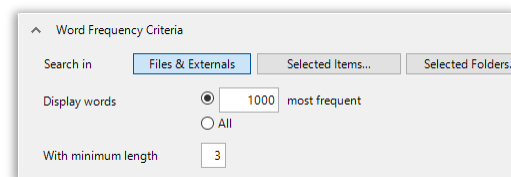
## 'Word Frequency' Query

Provides an idea of potential trends at a high level.

1. Go to **Explore** tab
2. Click on **Word Frequency**



3. Set parameters for query  
*Search: Files & Externals*  
*Display: 50 most frequent words*  
*Minimum length: 3*



4. Click on **Run Query** on the right

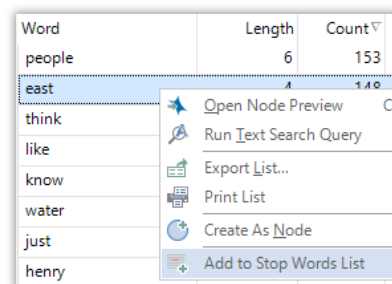
The results will be displayed. Nvivo has a built in filter to avoid filler words like it, is and that.

Word	Length	Count	Weighted Percentage (%)
people	6	153	1.62
east	4	148	1.57
think	5	123	1.31

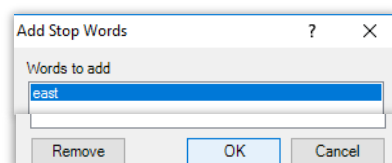
5. Click on **Add to Project** for future use

### a. Exclude words in query

1. Right click on **east** in results list
2. Select **Add to Stop Words** list

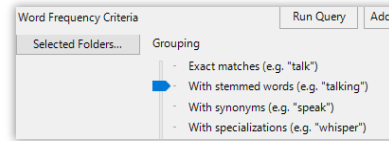


3. Click on **OK**
4. Re-run the query



**b. Automatic word grouping**

1. Change grouping to **With stemmed words**
2. Re-run the query

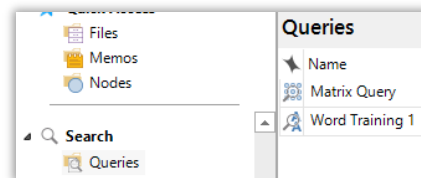
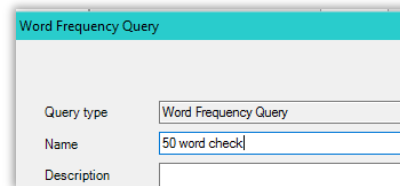


Word	Length	Count	Weighted Percentage (%)	Similar Words
people	6	167	1.48	people
think	5	125	1.11	think, thinking
developments	12	123	1.09	develop, developable, developed,
fishing	7	121	1.07	fish, fished, fishes, fishing
like	4	118	1.05	like, liked

**c. Add query to project for reuse**

1. Click the **Add to project** button
2. Enter a name for the query
3. Click on **OK**
4. Navigate to **Search - Queries** and view saved project queries

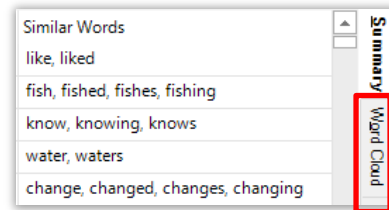
This is not the results, only the query settings



**Exercise 20.**

**Create a Word Query**

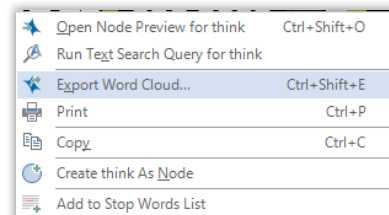
1. Click on the **Word Cloud** tab, below the **Summary**, at the right of the results list



2. Go to the **Word Frequency Query** tab
3. Select an alternative design



4. Right click on **Word Cloud**
5. Select **Export Word Cloud**
6. Enter a **filename**
7. Click on **Save**



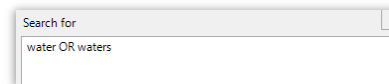
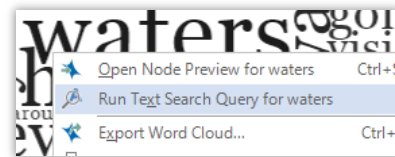
You will have a static image of the word cloud generated from



your text query

a. **Single word query**

1. In the word cloud, right click on the word "Waters"
2. Select **Run Text Search Query for waters**
3. Click on the **Reference** tab to see waters with more context
4. Click on the **Word Tree** tab.



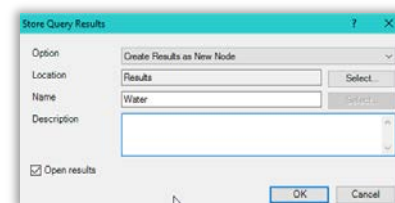
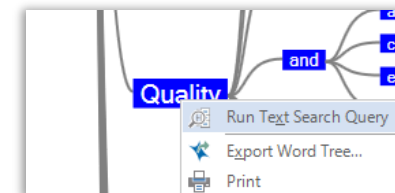
Name	In Folder	References	Coverage	Summary	Reference	Word Tree
Barbara	Internals	15	0.67%			
Charles	Internals	8	0.36%			
Dorothy	Internals	9	0.55%			
Margaret	Internals	8	0.32%			
Maria and Daniel	Internals	7	0.39%			
Mary and James	Internals	17	0.72%			
Richard and Patricia	Internals	7	0.41%			
Robert	Internals	5	0.22%			
Susan	Internals	11	0.47%			



The word tree groups together words which appear frequently before and after the word water

b. **Word tree query**

1. In the Word tree, right click on the word "Quality"
2. Select **Run Text Search Query**
3. Click on the **Summary** tab to see where water quality is mentioned in the interviews
4. Click the **Reference** tab for more context
5. Click on the **Word Tree** tab to see a new word tree
6. Click on **Save Results...**
7. Enter a name
8. Click on **OK**



Be aware the word tree is **not** retained when you choose Save Results... To display the word tree you have to re-run the query



## Visualisation Tools

### Exercise 21.

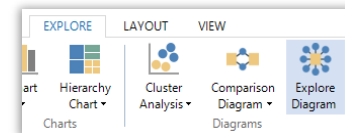
### Diagrams

#### a. Explore diagram

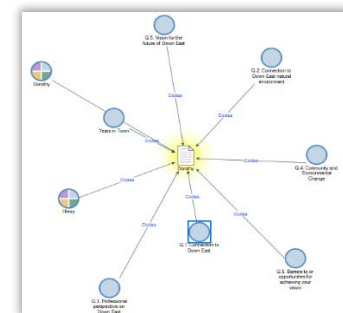
1. Select a Data – File or Case e.g. (Dorothy)

Name	Nodes	Reference
Barbara		9
Charles		9
Dorothy		9

2. Click **Explore Diagram** on the Explore tab



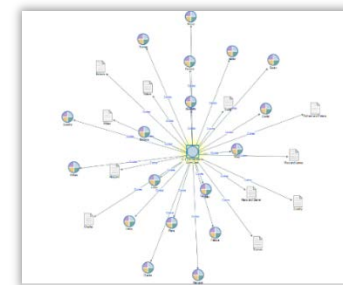
The diagram appears in details view



3. Click on a surrounding item

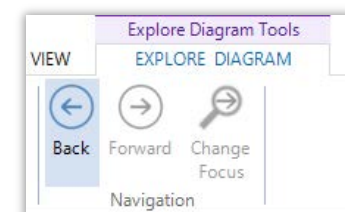
4. Click the **Change Focus** button on the Explore Diagram tab

Use the ribbon to see more connections



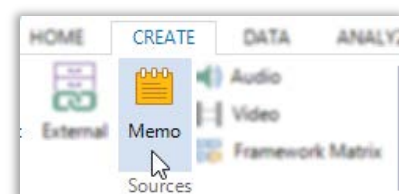
5. Click the **back** button to navigate through the diagram

6. Double click any item to view its content

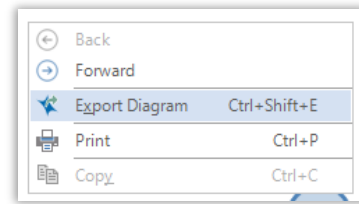


7. An explore diagram is NOT stored as part of a project.  
To save the diagram

- Copy and paste into a memo
  - a. Click and drag across image to select all elements
  - b. Copy: *ctrl C*
  - c. Click **Memo** on Create tab
  - d. Add a new memo name
  - e. Click **OK**
  - f. Paste: *ctrl V*



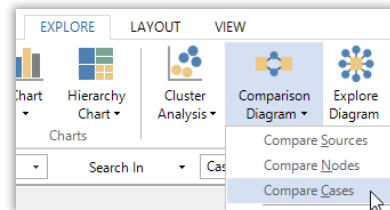
- Export as an image
  - a. Right click on diagram
  - b. Select **Export Diagram**
  - c. Navigate to a location
  - d. Click on **Save**



### b. Comparison diagram

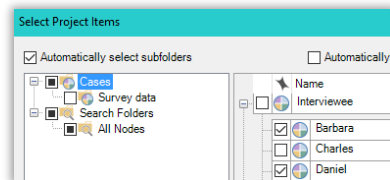
A comparison diagram lets you compare two of the same type of project items, sources, nodes or cases. The comparison indicates the similarities and differences between items.

1. Click **Comparison Diagram** on the **Explore** tab
2. Select **Compare Cases**



3. Select 2 interview participants
4. Click on OK

The comparison diagram opens in detail view



Everything items have in common is in the centre of the diagram. Links to item differences are shown either side of the diagram

5. Double Click any item to open and view content

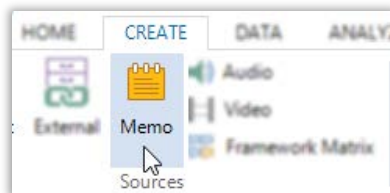


Use the tools on the Ribbon to show links you are interested in.



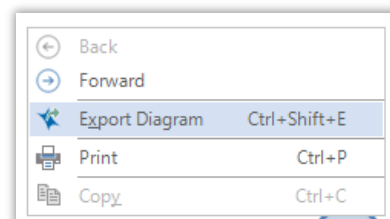
6. An comparison diagram is NOT stored as part of a project. To save the diagram

- Copy and paste into a memo
- or



- Export as an image

(See previous exercise)



## Extension Exercises

### Memos, annotations and links

**Memos** are an integral part of the research process. They are like documents or notes that can be linked to other sources or nodes. A memo can be about the entire project or it can link to a specific node or item.

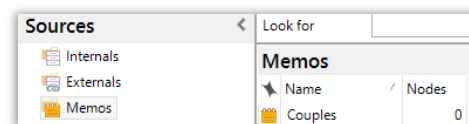
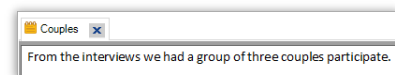
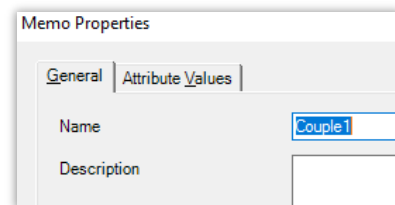
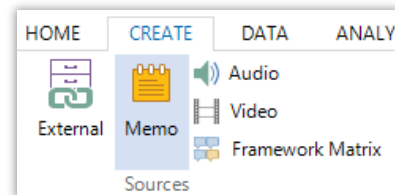
**Annotations** in NVIVO are like notes in the margin

**See Also Links** can be used as cross references between related items in your project

#### Exercise 22.

#### Create a Memo

1. Click on **Memo** on the **Create** Tab
2. Enter a **Name** – Couple1
3. Click on **OK**
4. Enter any notes relating to your source
5. Click Close cross on memo tab.  
NVivo will automatically save whatever you type.
6. Go to **Memos** in Sources  
The new memo will be displayed in list view



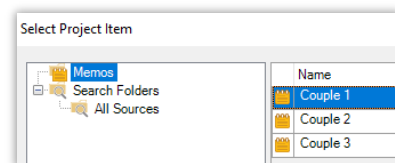
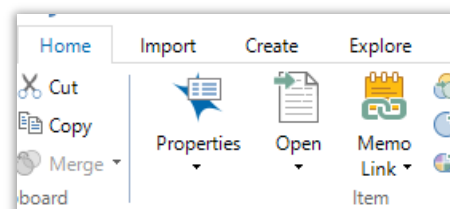
#### Exercise 23.

#### Link a Memo

To link memos to a source item, go to the source item first.

Memos can only be linked to a **single** source item. Anything already linked will be unavailable

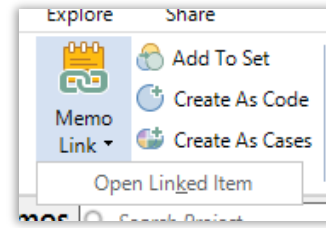
1. Go to **Data - Files**
2. Click on **Maria and Daniel** in interviews
3. Click the **Home** tab
4. Click the **Memo Link** button
5. Select **Link to Existing Memo**
6. Select the **Couple1** memo.
7. Click on **OK**



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a. **View memo or linked item**

1. Go to **Notes - Memos** in Sources
2. Select the memo with the link
3. Click the **Memo Link** icon on the home tab
4. Select **Open Linked Item**



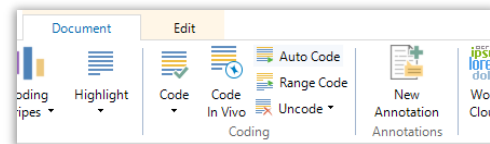
**Exercise 24.**

**Annotations**

Annotations are like margin notes you can record comments, reminders or observations. These will display with a blue highlight in the text.

a. **Create an Annotation**

1. Open a Data - File interview
2. Select text to annotate
3. Go to the **Document** Tab
4. Click the **New Annotation** button



A number is added at the bottom of the screen for your annotation. Click on this number to navigate to the annotation.

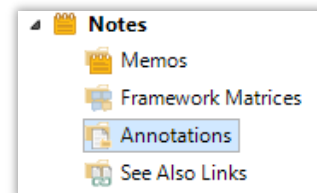
5. Start typing your annotation
6. Click into the source content when complete

Annotated text is highlighted in blue

Annotations	
Item	Content
1	A novel approach to land ownership

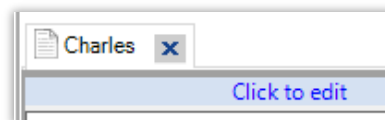
b. **Edit annotations**

1. To see all annotations in a project click **Notes – Annotations** in the navigator view



2. *In List View*: Double click to open a source

3. Select **Click to Edit**



4. *In Nodes*: Double click to open a node

All nodes connected to sources will be visible and annotation editing is activated automatically

Annotations	
Item	Content
1	Commercial fishing

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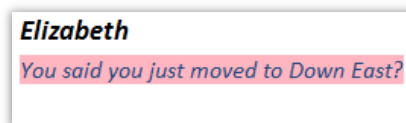
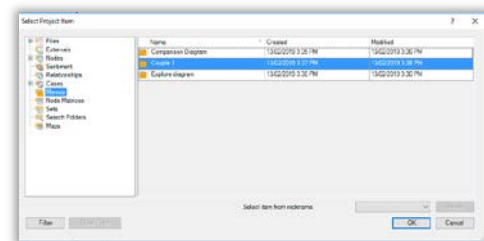
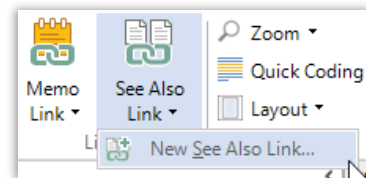
## Exercise 25.

## Adding a “see also” link

A ‘see also’ link is like a cross reference to connect items in an NVivo project. These will display with a pink highlight in the text.

### a. Link to an existing source

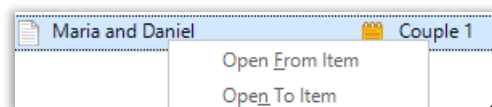
1. Select text to link from
2. Click **Document** tab - **See Also Link**
3. Click **New See Also Link...**
4. Click the **Select** button.
5. Navigate to the item to link to
6. Select the item
7. Click on **OK**
8. Click on **OK**



The ‘See Also’ link will be added and link text will be pink

### b. Go to See Also links – in Notes in the Navigator view

1. Right click on the link details
  2. Select **Open to Item** to open the linked item
- Or
- Select **Open from Item** to open where the link was created



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