

NVivo 7 Tutorial 1:

Setting Up your Project

This tutorial is about starting out in software.

Starting out is not a very predictable experience, since many factors affect confidence and success. These include obvious variables like experience and competence with computers, familiarity with the purposes of qualitative research and resources of time and assistance. But none of these is an overwhelming requirement! Success will be most directly a result of your own efforts to see the purpose of each exercise and to do it yourself.

The exercises in this tutorial have two purposes: setting up your own **project** (and getting familiar with the software) and ensuring you can **save**, close and open it.

They start with ways of meeting the software through the online resources that come with it. There are Getting Started self-running tutorials provided, which will help you to learn how to use the menus, and the uses of the different folders in the **Navigation View**.

Following this introduction, there are instructions to set up your own project, and to familiarize yourself with where your data and reflections will be stored. An introduction is provided on using Help and customizing the software to suit your style.

As you work through this first tutorial, take notes of any processes you don't understand or want to explore further.

For advice on the early processes of a project, logging the plans and the journey, entering the field, declaring the assumptions you bring with you, and learning the software tools you will use on the way, go to Chapter 1 of *Handling Qualitative Data*.

For assistance with the basic software processes, use the online Help. A section of this tutorial introduces it.

Note: if you want more advice on the ways of getting into your own project in NVivo, there is a free handbook, *Up and Running in NVivo*, available on www.lynrichards.org.

1. Meeting the software

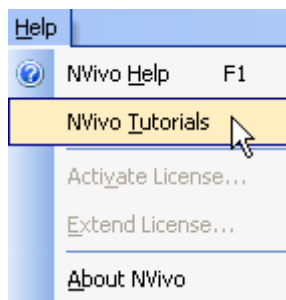
At this stage you need an overall familiarity with the tools offered by your software.

If you have access to an introductory class or workshop, this gives the easiest first encounter with the software. Watching someone who knows it will quickly show you how to use it.

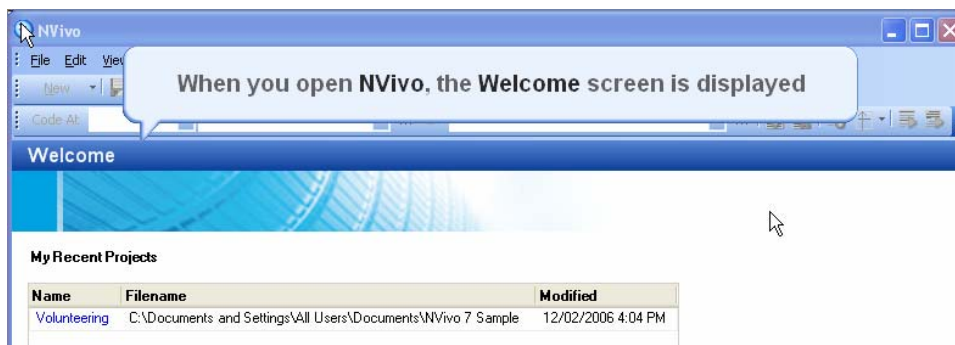
If you are teaching yourself, use the Getting Started Guide and the Tutorials provided with the software.

To access the Tutorials:

1. NVivo7 should be installed on your computer. This will be done from a CD or by download from the QSR website.
2. Start the NVivo application by clicking the desktop icon (or via **Start>All Programs>QSR>NVivo7>NVivo 7**). The Welcome screen shows a list of recent projects which includes the sample project and any other projects a user might have created.
3. On the menu bar, select **Help** and then **NVivo Tutorials**. There are five Tutorials, which run automatically.



4. On the left hand panel, select the tutorial called **Introducing NVivo**. The messages appearing on the screen will explain the basic processes of starting a project in NVivo.

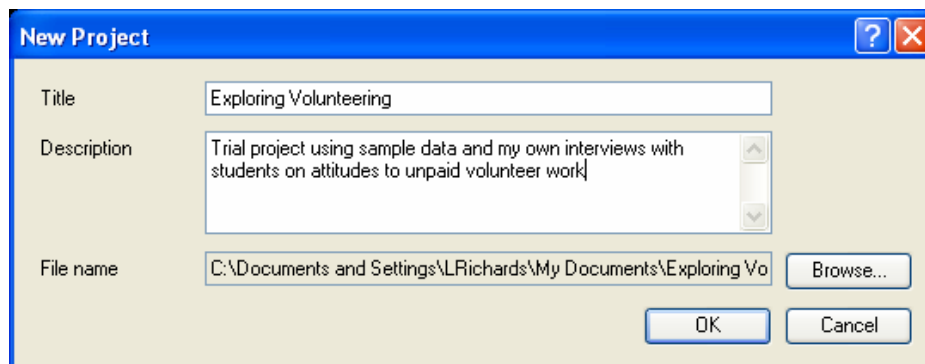


2. Setting up your own project

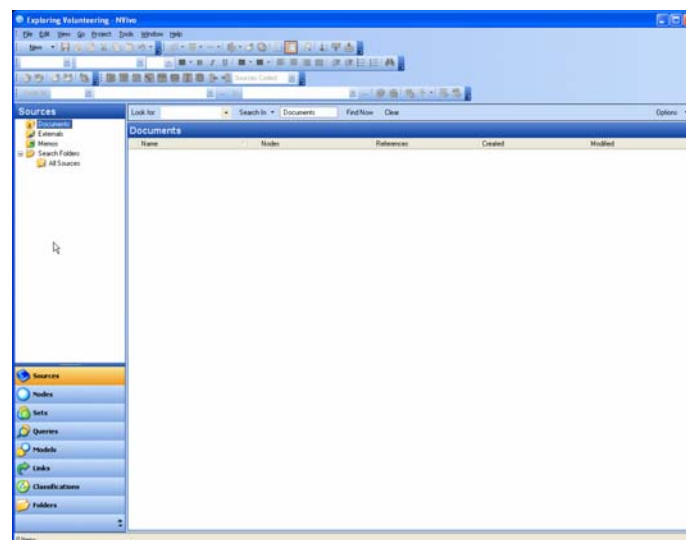
The next task is to set up your project ready to receive your data sources and ideas.

To create a project

1. Whether you just launched NVivo, or just closed a tutorial, the NVivo **Welcome screen** is displayed.
2. Choose **New Project** from the File menu
3. Type in the name of your project and a brief description. Note that unless you choose a different location, the project will be stored in your “My Documents” folder. You can change the location of your new project by clicking on the Browse button in the New Project dialog box. (If you want to move or copy a project **after** you have created the project, then you can do this from Windows Explorer just like any other data file.)



4. Once you click OK in the New Project dialog box, your new project is created and the NVivo **Navigation Window** opens. On the title bar at the top of the window will be the name of the project you created. (In the illustration, it is called “Exploring Volunteering”).



Getting to know the Navigation Window

This window will be home base for your project. Its left hand side folders store all the data items you create or import, and its right side panes list those items and display their contents. (Currently, there's nothing there to show.)

If you are using MS Outlook, this window looks very familiar. It's meant to do so! For the life of your project, it will be the way you access data items and content.

In the folders on the side you can store all the data and explorations of a project.



Setting up your project, you can

in **Sources**, put your data documents and memos;

in **Nodes**, store ideas and coding;

and in **Sets**, group those sources and ideas.

Then, as your analysis progresses, you can

make **Queries** to ask questions of your data;

in **Models**, make diagrams and images;

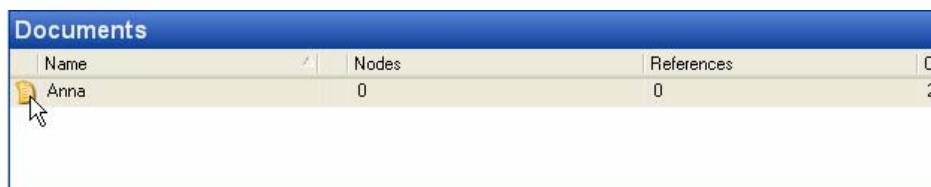
use **Links** to connect data items and content,

and make **Classifications** for attributes and relationships.

As you create data and start analysis, there is a place for each item in these folders.

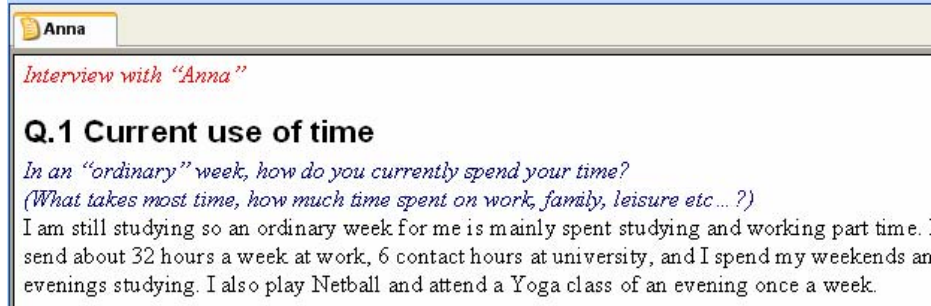
And in the panels on the right hand side of the Navigation Window, you can see and manage the contents of any folder – listed, or shown in detail.

The **List View** of items, and information about them, will appear in this space when you click on any folder.



Name	Nodes	References
Anna	0	0

The **Detail View** of the contents of an item will appear below that list when you double click on any item in the list.



Anna

Interview with "Anna"

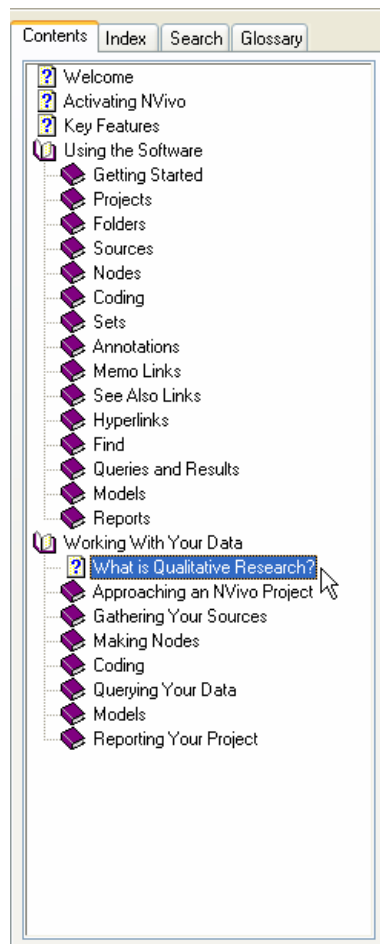
Q.1 Current use of time

*In an "ordinary" week, how do you currently spend your time?
(What takes most time, how much time spent on work, family, leisure etc...?)*

I am still studying so an ordinary week for me is mainly spent studying and working part time. I spend about 32 hours a week at work, 6 contact hours at university, and I spend my weekends and evenings studying. I also play Netball and attend a Yoga class of an evening once a week.

3. Using Help

1. Click on the Help menu, this time to access the Online Help

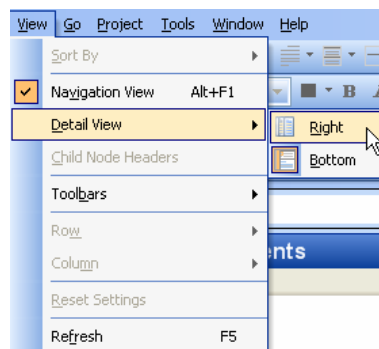


2. Take time to check the Help contents. Note that there are two parts.
 - In the sections on **Using the Software** you will find instructions for conducting each task or process in NVivo 7.
 - Go to the topic on **Getting Started** and read the subtopics about navigating NVivo and customizing the workspace.
 - The sections called **Working with Your Data** offer advice on why you would be doing this, and how to use these tools in *your* project for *your* analysis goals.
 - Go to the topic on **Approaching an NVivo Project**. Read about what it is like to work in NVivo 7.
3. Click the Search tab and try searching for information about some of the processes you are about to conduct. Note that each topic takes you to information about using the software and working with your data.

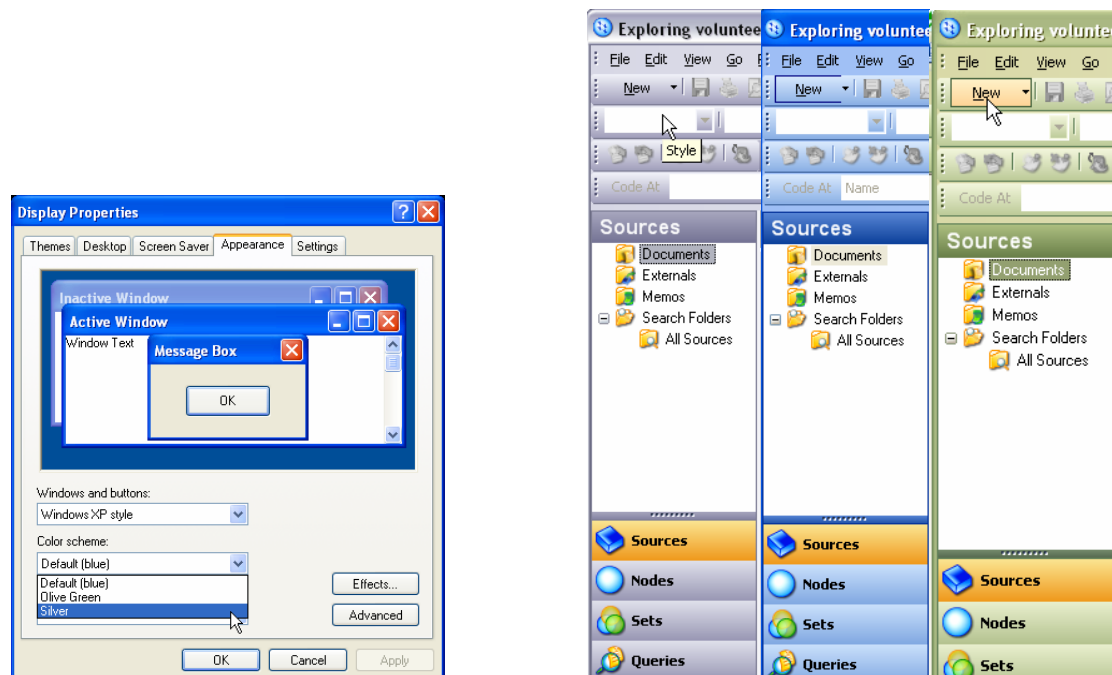
4. A first step to customizing NVivo

Qualitative researchers often care about the way their data records look, and the appearance of the screen they are working on.

1. In the Navigation Window, you can change how the folders appear (just as in MS Outlook) by selecting to show and hide them or see the subfolders all together.
2. You can undock (and re-dock) the Detail View, making it a free-floating window, whenever you want to concentrate on just one item – to do this, click **Docked** in the **Window** menu.
3. And importantly, you can change whether you see the panels of the Navigation Window with the Detail View below the List View, or on the right hand side. Experiment with different layouts especially when you start coding.



4. And yes, you can even change the color scheme of NVivo – and of course any other application you run under Windows, to fit your preferences by changing the Windows settings. If you see a colleague’s NVivo in different “livery”, this is why! Go to **Settings> Control Panel> Display> Appearance** and choose from colors offered.

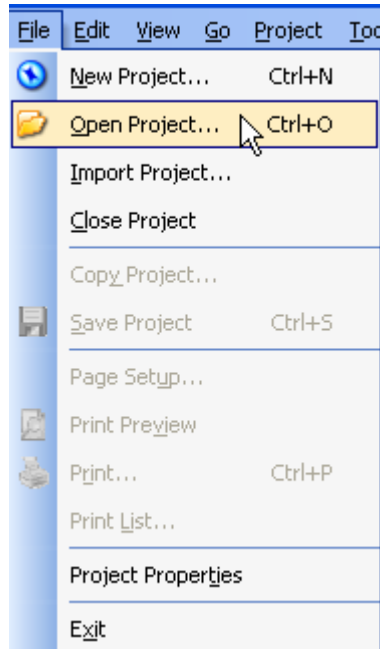


These tutorials and the Help files are in the default color, “blue”.

5. Your project and its management

Now, to your project. Your NVivo project is stored as a single file. The **File** menu allows you to make a new project, open your existing project or close it.

Note the options available from the File menu.



From this menu you make a new project, open an existing one or import one project into another.

If you are working in a team you may later wish to combine your projects in one. By importing one project into another, you can merge your work. If you wish to do this, go for advice to the Help topics on importing projects.

The File menu also gives access to the Project Properties. Here you can change the name or description of your project.



Note, if the name is changed internally, the project's file name on your computer hard disk will not be changed.

To close and locate the project

1. From the File menu select **Close Project**.
2. If you have made any changes to the project, you will be asked whether you wish to save this project, choose **YES**.

Congratulations! You have a new, saved project, waiting for your data and ideas.

Your NVivo project database is saved in a single file. By default it is in the My Documents folder. (If you changed this default, or move it at any time, be sure to record where you placed that file.) Your new project should now be stored in the location you specified.

3. Go to the **Windows Explorer** and the folder for **My Documents** to check your project is where you put it. It is a single file with the NVivo 7 icon and the extension **.nvp** (for "NVivo project"). Like any other file it can be copied, moved or sent to a colleague.

To open and save your Project

1. When you closed your project, you returned to the Welcome window, which now shows the name of your project. Click on its name. Your project will open in the Navigation window.

Note that on the **File** menu, **Save Project** is probably not available, because you have not made any changes to save.

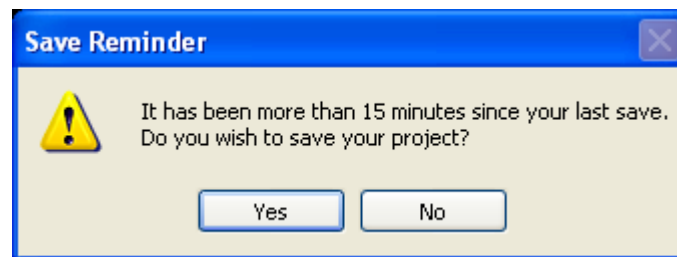
- From the File menu, select **Project Properties**. The window tells the name and description you gave your project, and the time you created it. Alter the description to add detail. Now, you have made changes and can select the **Save Project** option, or simply use **Ctrl+S**.



Make a habit from now of doing a Save whenever you feel you have significantly changed your project.

To manage saving and undoing

NVivo has **Undo** – more on how to use it below. After you save changes, they cannot be undone. For this reason, NVivo will not “autosave”. Rather, it will ask, at regular intervals, if you wish to save. (You can change the frequency of reminders – see next section on Options). Always consider your answer, as you may wish to **Undo** something you just did.



When you close a project, if any changes have been made to it, NVivo will ask you if you wish to save changes.

To back up your project file

There is great advantage in having your project saved as a single file. It is much less likely to be damaged by bad file management than a project saved in many folders. Also, you can easily send the entire project to a colleague or supervisor as an attachment to an email. If it gets big, compress the file using Winzip.

You back your project up like any other file.

When you wish to back your project up

- use whatever is your normal backup procedure to make a copy of the project file on another safe storage device;
- or if you prefer, make a copy of a project from the Welcome window in NVivo. (Simply select **File>Copy Project**)

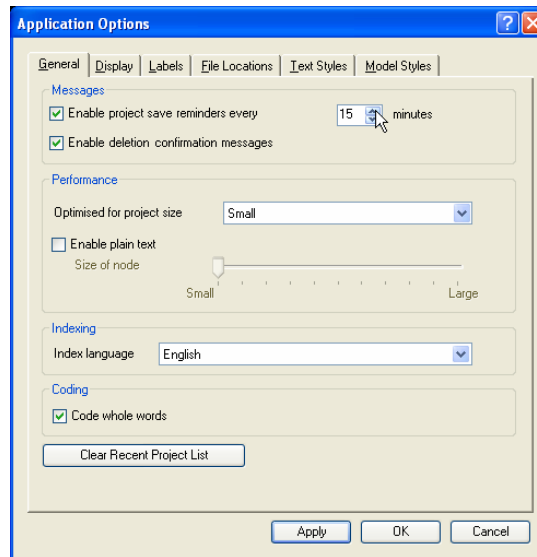
Always back up your project frequently, and keep a record of where you stored the backup copy, and of other relevant information about date, state of project at backup, in case of computer problems or change of direction in your thinking. When you are working qualitatively, you can change the project data base very many times in so many minutes! Like any computer file, your project can be deleted or mislaid if you are not careful with your data management processes.

To set application options for save and safety

1. From the menu bar select **Tools>Options**. The Application Options window opens. Set the project save reminders to the time you prefer.
2. Click through the tabs to check the range of project options you can set.



Big Warning! one option is **Enable deletion confirmation messages**. Unless you are very confident, **don't un-tick it!!** For most users, it is essential to have that warning when, unintentionally, they have asked to delete items.



3. Note the final button will **Clear Recent Project List**. You'll be needing this! Use it when you wish to clean up the Welcome Window's list of projects after you remove experimental old projects, or move ones you are working on.

This concludes NVivo 7 Tutorial 1. Go to Chapter 1 of *Handling Qualitative Data* for advice on any of these research processes..

Now for some data! In Tutorial 2, you'll make documents in three different ways – and back up the now growing project.