

NVivo 7 Tutorial 2:

Creating and Importing Sources

This tutorial is about how to make data records in NVivo7, or import them into your NVivo project. There are three ways of doing this – in this tutorial there are instructions for each. You will:

- **import** one or more records from a word processor file;
- work in your project, and **create** a record there;
- record a summary of what's in an **External** record.

And since at the end of this tutorial you will have a project underway, it concludes with instructions for a fourth task:

- **back up** this precious project file that records your work!

Chapter 2 of *Handling Qualitative Data* is about making qualitative data, the many ways of doing so and how to make useful data for your purposes. To review what you need to know about documents, go to the [Online Help](#).

About sources: documents, memos and externals

NVivo provides three folders for three sorts of Sources – documents, memos and externals.

These are common divisions in a qualitative project. You can make further sub-folders of your own to hold different types of Sources. Documents, for example, may be divided into interviews and focus groups, or memos into theoretical and methodological notes.

If you are working in NVivo you can write early research design records or letters etc. in a word processor and import them to your new project as documents or memos. Or simply write them within your project.

And you can make “External” sources to represent other material that you will not bring into the project at all but don't want to lose.

This tutorial takes you through the steps to import a source, to create a source in NVivo and to create an External to record other data.

As you work through these steps, note that there are always at least two ways of getting to the commands you wish to give the software. Familiarity with these different ways of working with software will help you find the way that suits you best.



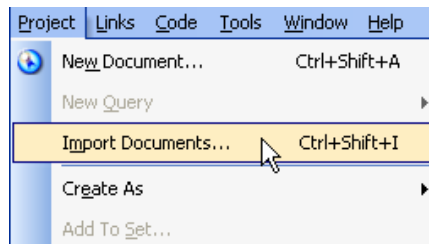
Use the List View, as you work. Like the familiar Windows Explorer, it will allow you to sort on any of the columns in the right pane. As you bring in more sources, you can view your documents or externals in order of size, amount of coding, or date created or modified.

1. Choose how you work in NVivo

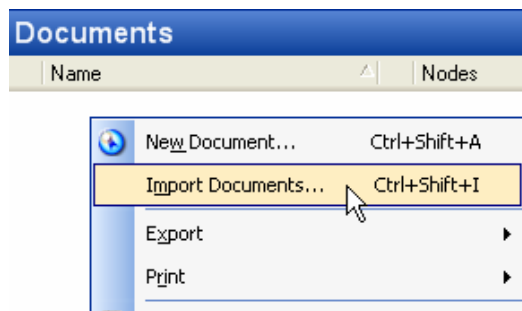
Most tasks can be accessed via the top level menu and also the context menu available from the right-mouse button. For most menu items there are short cuts. And for some there are icons on the tool bars. For example, there are always three ways to add any new item.

You first need to tell NVivo *what you wish to add*. You do this by clicking on the appropriate folder, and then clicking in the right pane **List View**. Now what you can do for that sort of item will show on the Project Menu and the Context menu when you click the right mouse button.

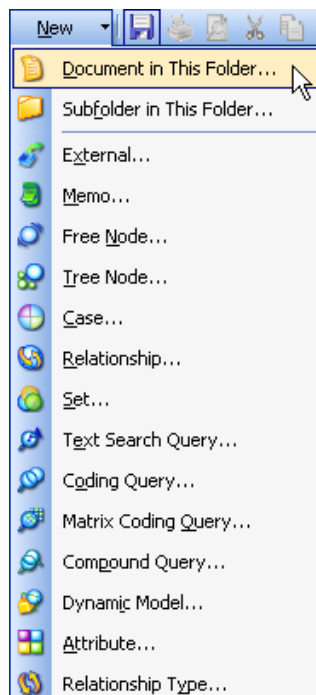
1. Go to the Project menu and you will find it offers the option to create a new item of that sort (or, for documents, import them).



2. Or right click in the List View and from the right mouse **Context** menu select the option to add a new item of that sort (or, for documents, to import them).



3. Or just use the **New** button to create this sort, or any other sort of new project items.



Have you noticed that most common actions in NVivo 7 have fast keys showing with the menu items? It is useful to learn the ones you will often want to use.

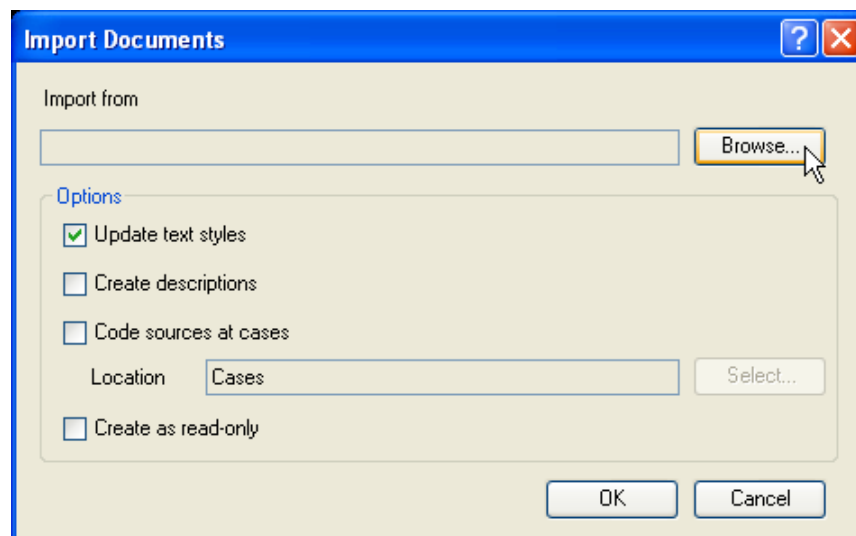
2. Making sources

Most of the data sources in most qualitative projects are recorded in text. At this stage, you may have early research design documents. Later, you will add transcripts of interviews, field notes, survey responses etc.

As those documents are created, they are usually typed up in your normal word processor (here we will assume it's MSWord.) These word processor documents can be imported directly into your project in NVivo. They can be in Word files (.doc) or in rich text format (.rtf) or of course in plain text (.txt). If you use Word files, they can include pictures or tables or other embedded objects, and you will be able to view, code and retrieve this content.

To import a document

1. Create a document in your word processor, or locate one you have already typed up. Or write an informal one about what you are planning to do and call it something like "Project Journal". Save it as a Word (.doc) file, in a sensible location.
2. In your NVivo project, click on the folder for **Sources**, and then **Documents**. Click in the List View to show you want to work with the items in that folder. From the **Project** menu select **Import Documents**. (Or select this command from the context menu when you click your right mouse.)



3. Note the options offered. The option to **Code sources at cases** is covered in the tutorial for Chapter 3. **If you are importing documents (e.g. interviews) that represent cases for which you want to store information, go to that tutorial to read about cases.**
4. Click **Browse** to select the file to import. Navigate to where your first source file is located. Select it, and click **Open**. (If you have prepared more than one document, select with **Ctrl+click** or **Shift+click** to import many documents at once.) Click **OK**.
5. The **Document Properties** are shown. By default, the name of the document is the name of the file selected. You can rename or re-describe the document at any time by going to its Properties.

- Click **OK**. Your document is imported and its name and details appear in the **List View**. To read it, double click on the icon next to its name, and its contents will open in the **Detail View** below.

The screenshot shows the NVivo interface. At the top, a blue header reads 'Documents'. Below it is a table with columns: Name, Nodes, References, and Created. A single row is visible with the name 'Anna', 0 nodes, 0 references, and a creation date of 29/05/2006 3:20 PM. A mouse cursor is hovering over the document icon next to the name. Below the table, the 'Detail View' for the document 'Anna' is shown. It features a red title 'Interview with "Anna"' and a section header 'Q.1 Current use of time'. The text below the header reads: '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 send 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.'

If you wish, you can edit the text, cut and paste text or images, change colors and fonts etc just as though you were in a word processor. Close the Detail View at any time by clicking on the X in the top right corner of the detail view.

To add a new source in NVivo's editor

Documents or memos can also be introduced into a project by transcribing directly into NVivo. It has a rich text editor, with font controls, and Undo. (Though of course it does not have full word processor functions like spelling checkers.)

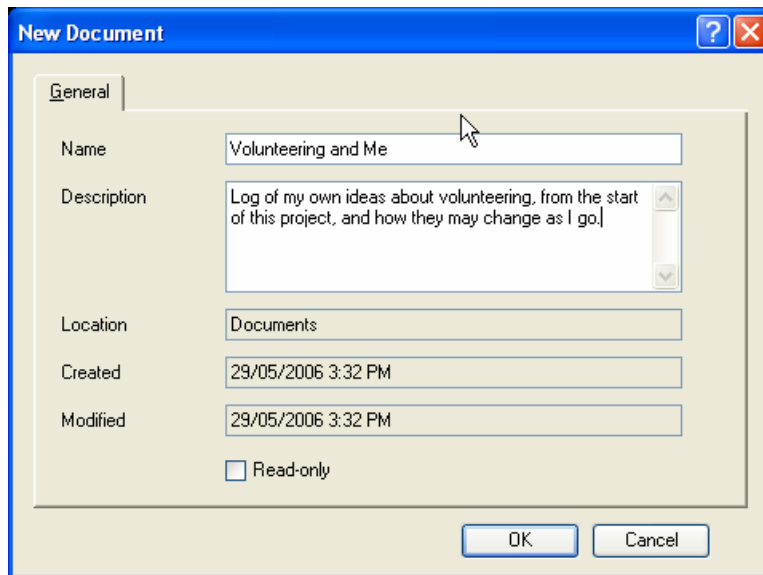
Now consider a memo you wish to start. Perhaps a record about your own attitudes (prejudices?) to what you are researching? This may be a first important contribution to your project's logging process. Once it's created in NVivo you can continue to enter into it all the changes in your views (or confirmations of them) that should be logged.

As you'll see in later tutorials, there are huge advantages in typing directly into NVivo. Any log trail document can be linked to the data it describes and you can code as you type. But for now, just start it.

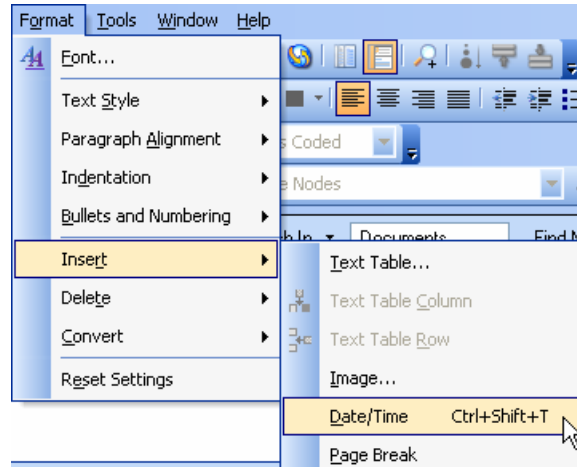
- In the Navigation window, click on the folders for **Sources** and then **Memos**. Remember to click in the List View to tell NVivo you want to work with the items in that folder. Now you can use the menus as before: click **Project>Add Memo** or use the context menu **or** the **New** button.
- In the **New Memo** window, name and optionally describe your memo.



Descriptions matter! NVivo gives a description option for most project items. Always use this if your purpose in creating an item (like a memo) may be forgotten or confused. Teams are much helped by storing descriptions to convey purpose.



3. Click **OK** and the memo is created. The content (currently none) opens in the **Detail View** Type on... you are in NVivo's rich text editor so use heading styles, italics, bold or color as you wish. (Advice on starting a Log Trail document is in pp. 43-44 of *Handling Qualitative Data*.)
4. It's important to date the entries in any project log. Note that you can time-stamp your entries by selecting **Format > Insert > Date/time**, or just hitting **Control+Shift +T**.



5. Close the memo as you would in a word processor, by clicking the corner X in the title bar. Changes will be automatically saved.

3. Recording external data

Now for data that is not easily brought into NVivo. As noted in Chapter 2, qualitative data records are rarely homogeneous. Much of your data will not be textual.

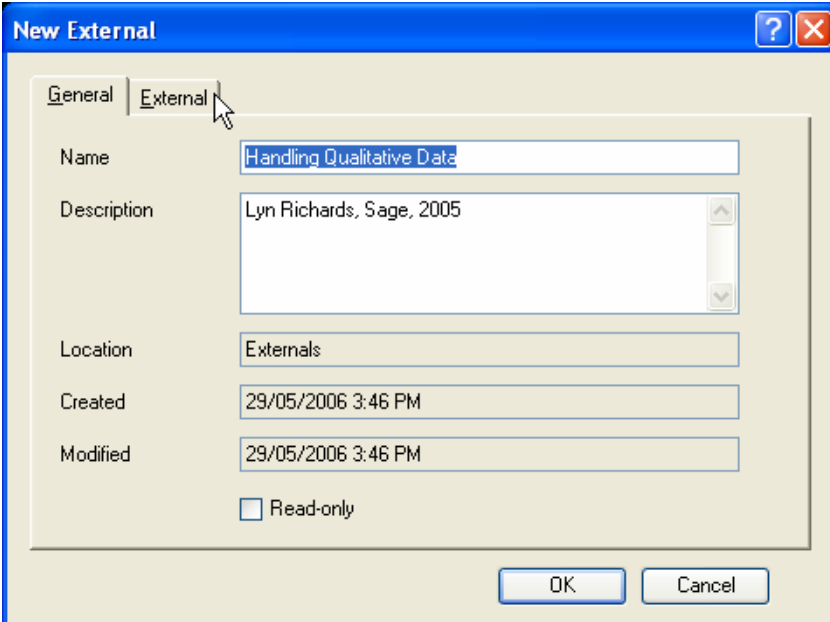
For the project you proposed, find some data that you do not want to bring into the computer, or can't – e.g. books, photos, a video, or a box of newspaper cuttings. In NVivo, such data can be represented by "Externals". If the data represented is a file on your computer it's called an "**external file**" because it will not be in your project. If it's not on your computer, it's termed **non-file** data.

To add an External for a book

If you are stuck for some external data, make an External for *Handling Qualitative Data*. Any project requires work with literature, and with an External you can reference and keep connections with books and articles. Your summary of each chapter, with occasional quotes, is a Source for the project; you can link it to relevant data in your project and use coding to find the passages when they are needed.

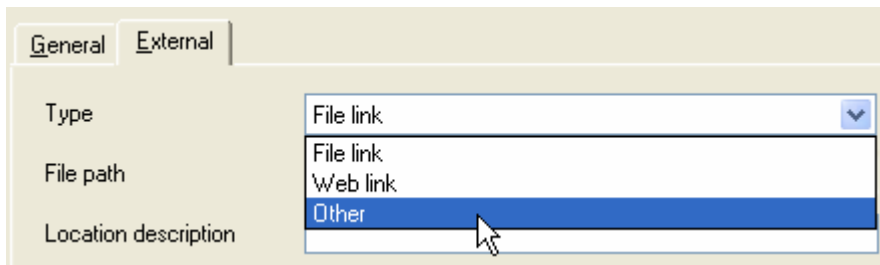
The process of creating a new item should be familiar now – select the folder you will create it in, (**Sources** and then **Externals**) click in the **List View** to show you want to work with the items in this folder.

1. From the **Project** menu (or the context menu), choose **Add External** (or use the New button: **New>External in this folder**).
2. Type in the name and any relevant details.

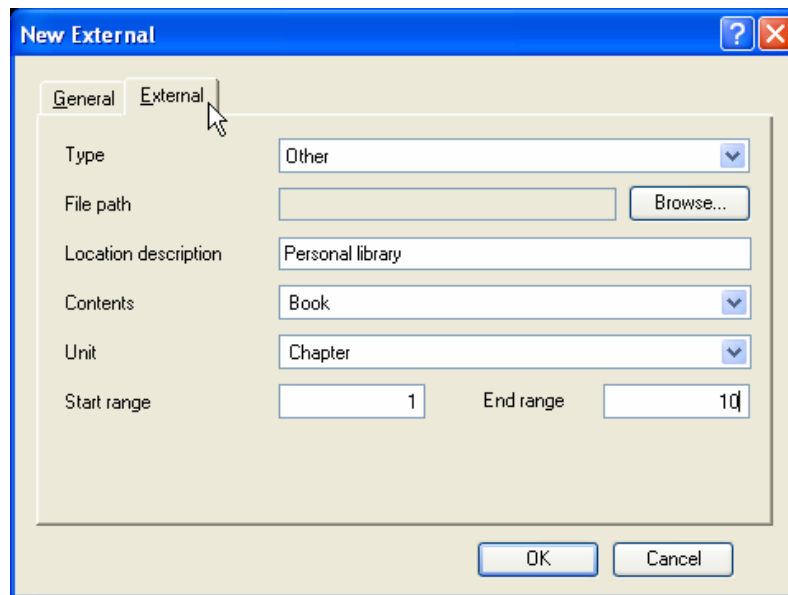


The screenshot shows a dialog box titled "New External" with two tabs: "General" and "External". The "External" tab is active. The "Name" field is "Handling Qualitative Data", the "Description" field is "Lyn Richards, Sage, 2005", the "Location" field is "Externals", the "Created" field is "29/05/2006 3:46 PM", and the "Modified" field is "29/05/2006 3:46 PM". There is an unchecked "Read-only" checkbox at the bottom. "OK" and "Cancel" buttons are at the bottom right.

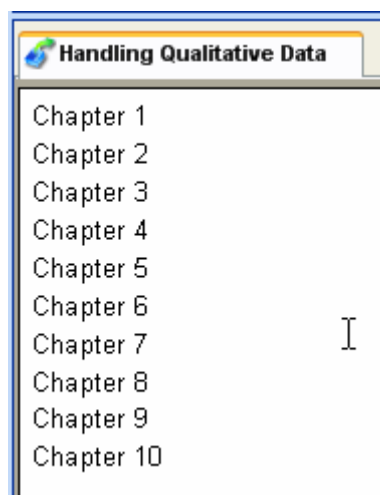
3. Click the **External** tab to specify the **file type** – this can be a file link or web link. If you are describing something (like a book), that is not a file on your computer or a URL, select **Other**.



- If you wish, specify what the contents are, the unit (e.g. chapter) and the range (e.g. chapters 1-10).



- Click **OK**. Your External appears, ready for you to type in summary or comments. If you asked for numbered units, you have a template into which you can type the summaries of your external data. Each chapter (or other unit that you've specified) has its own paragraph, so you can put the summary or your comments at the appropriate place.

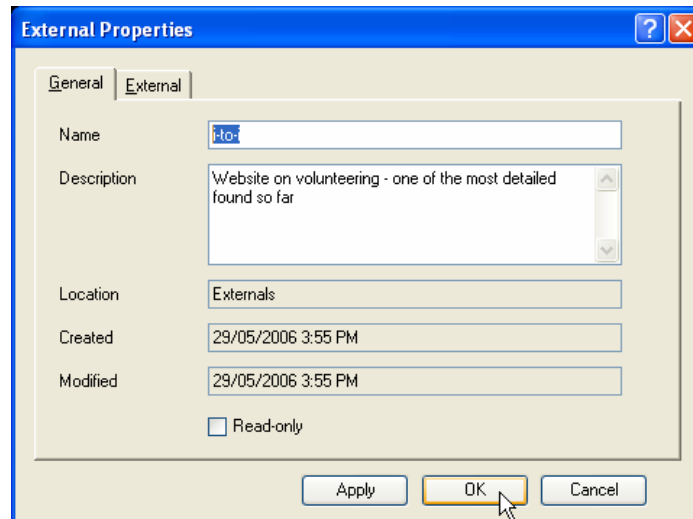


- As before, just type as though you were in a word processor, changing styles, fonts, etc as you wish. You can insert hyperlinks to a website or images from the book. In the later tutorials to Chapters 3 and 5, you'll learn how to link and code this different sort of data.

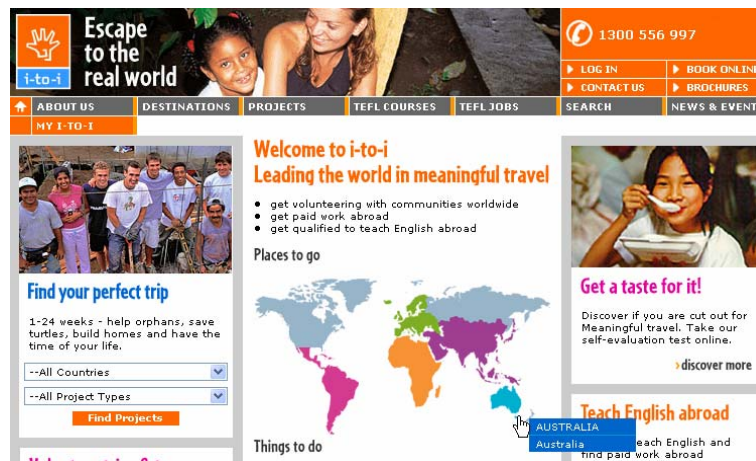
To add an external for a website

This is a very common requirement – you have found a site and wish to keep the link to it and record your notes on the content. Make an External for that website and you can at any time jump to the site from your NVivo project.

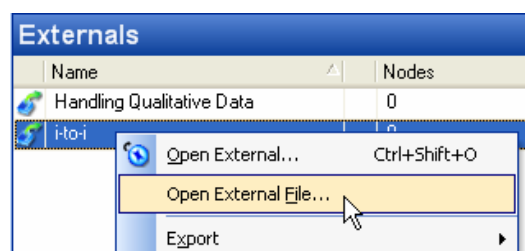
1. You've found the website and copied the URL. As above, **Add External**. Type in the name and description.



2. Click the **External** tab to specify the type and location of this source. Contents or units are not relevant for a site – simply leave these options. Click **OK**.
3. The External opens in the **Detail View** and you can type your summary or reflections. You can copy and paste images into your External if you wish.



4. From the **List View** you can at any time Open External File – (from the Project menu or Context Menu). This calls the website (if your computer is connected to the web).



4. Saving and backing up

A reminder: NVivo 7 has saved your project in a single file. This single file can now be stored on a CD, Zip Disk, Network drive or emailed to a supervisor or colleague.

1. **Save and Close** your project.
2. In the Welcome Window, select **File>Copy Project** and follow the directions to make a copy of your project.

OR

3. Find the project file in your My Documents folder, and make a copy of the file.
4. Now, save the copy somewhere other than on your computer hard disk, for backing up.



You haven't created a secure backup until this backup file is copied elsewhere. A backup on your hard drive is a copy not a backup - reflect on what happens to it if your hard drive dies or your computer is stolen.

This concludes NVivo 7 tutorial 2. Got to Chapter 2 of *Handling Qualitative Data* for advice on any of these research processes..

You now have a project with data, and a good routine for keeping it safe! In the next tutorial, you'll learn how to store different sorts of information.