

NVivo 7 Tutorial 4:

Editing and Linking – Getting “Up From The Data”

In this tutorial, you will work with just one document in your project, to explore the processes of “taking off” or “getting up” from the data. As you read the record, and discover new ideas, you will try different ways of storing these in software.

In Tutorial 5, the processes of coding will be described. Normally, researchers combine the storing of ideas with the creating of categories and doing coding – but for early steps, it is useful to take them separately. In the following exercises you will:

- Edit a document
- Annotate it.
- Write about it in a memo.
- Link it to related data.
- Draw your first ideas in a model.

The first section of this tutorial, on editing, contains an introduction to the toolbars and icons that give access to NVivo’s processes. Unless you are very familiar with using toolbars, you will be helped by familiarizing yourself with the shortcuts and quick access routes to tasks you may wish to do often.

Remember, there is almost always a choice of ways of asking NVivo to do something. As a reminder to select the processes that suit you best, the alternatives are noted in this section, in blue.

Chapter 4 in *Handling Qualitative Data* is about the exciting processes in qualitative research involving discovery and exploration of ideas from the data.

To review what you need to know about the different ways of storing ideas and different sorts of links, go to Help.

Focusing on a document

To start this tutorial, select a document you already have as a Source in your project.

Print it out or browse it on the screen, and *really* read it. Make notes about it as you read.

Now, go back to the start of that document. This time read the text very thoroughly, line by line. (As you find material that is interesting, conduct the exercise on “Taking off from the data” in *Handling Qualitative Data*, pp. 70f. In turn, the following exercises use each of the ways of storing ideas about the document discussed there.)

1. Editing and undoing

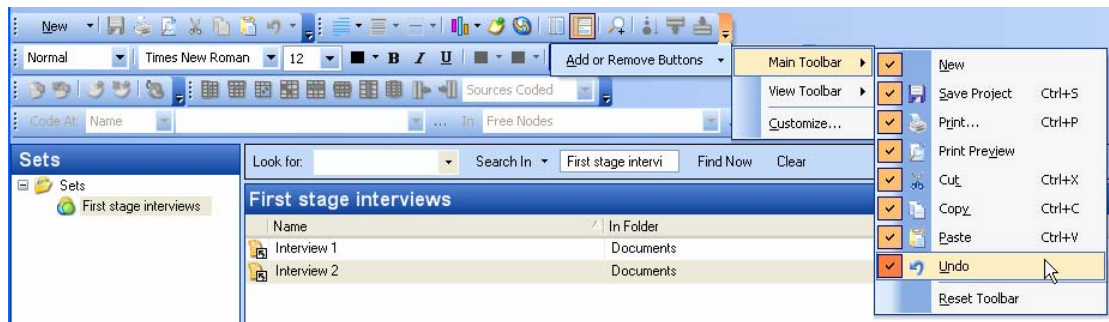
To edit a source

1. In the List View, create or select the document you wish to edit. Double click to open it in the Detail View below.
2. This window allows you to write text, delete and edit it, as well as to annotate, create memos and (see next tutorial) code.
3. Do some editing. The easiest way to create, add to or comment on the content of your data records is of course to edit them. You edit in NVivo very similarly to editing in a word processor.

A note on toolbars

If you are familiar with your word processor's toolbars, or those in Outlook, you will find NVivo's have icons for the same main processes and you can manage them similarly. Check the special NVivo functions and icons and then move to the next section!

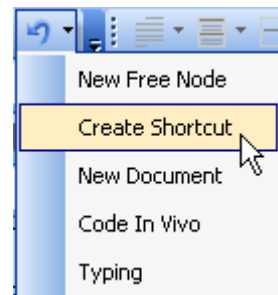
But if you are not used to using toolbars, take time to make these suit you. Qualitative research involves a lot of writing. Check that you know what each icon represents, by hovering over them. The **Main** toolbar has familiar icons for cut, copy, paste options, and importantly, **Undo**! (You can view all the icons and what they represent in the **Add or Remove Buttons** list.)



These main menu options will apply to many processes, not just editing a data record. You can cut and paste a node, for example, or undo a change to a model.



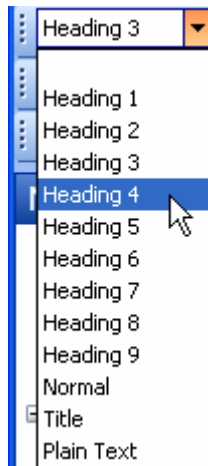
Clicking the **Undo** icon will undo the most recent process. Clicking the dropdown arrow beside the **Undo** icon will show the last five processes you conducted. Select any to undo back to the selected process.





The **Edit** Toolbar has icons for familiar word processing tasks. The first slots on this toolbar set text styles, font and font size. You may wish to make the toolbars shorter and use short cuts instead of icons. To do so, from the Add or Remove Buttons list untick any options you wish to hide. (As above, you can view the icons with their names by pulling down the Add or Remove Buttons list.)

From the first slot on the Edit toolbar you can set the style for your text.



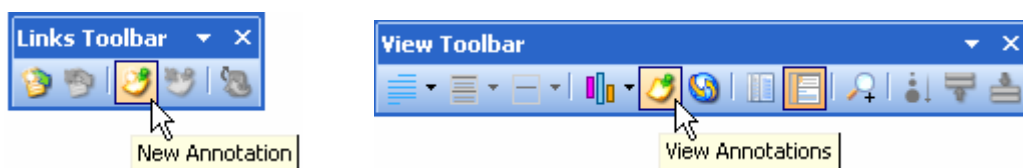
If you use Headings when typing sources in Word, they will be imported with the source to NVivo.

By setting heading level, you give NVivo information that allows it to show and autocode the content between headings.

Click **Customize** at the end of any toolbar to hide icons you don't want to use. But first check what they offer you!

There are four further Toolbars specific to NVivo's processes, **Coding, Links, Grid** in tables, and ways of **Viewing** the data. Check how they represent items in the menus – those most commonly used.

You can drag the toolbars, as in Word, to relocate them (with their identifying names).



For the next section, on annotating, try using the icons on the **Links** and **View** toolbars.

2. Annotating sources

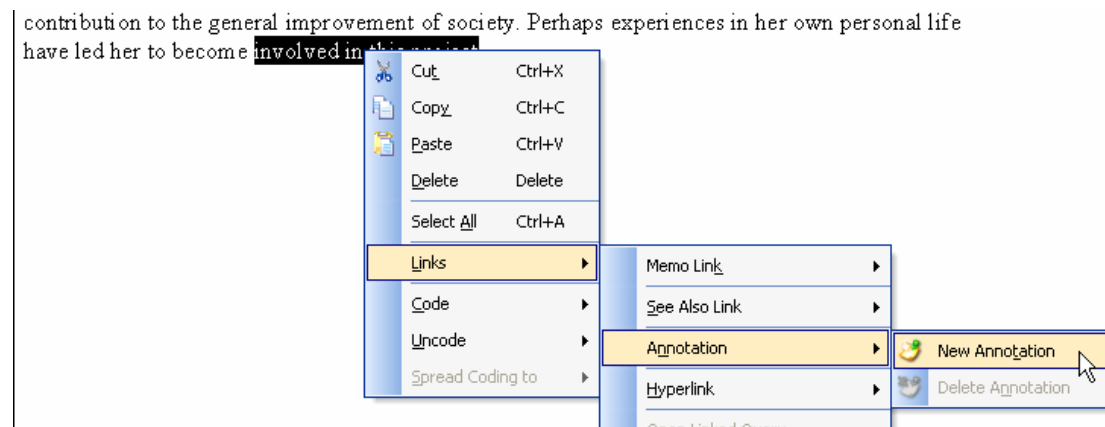
Editing a data record is not always a desirable way of recording your ideas. If this is a record of an interview transcript, or a letter, you are unlikely to want to alter it with your comments, or distract from the voice of the respondent. For such commentary it is preferable to add an annotation that is linked to the text but does not interrupt it. Annotations can be searched using **Find** or **Text Search Query**, and when you do coding, your annotations will be kept live with coded text.



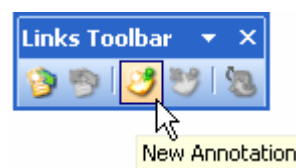
Words in an NVivo annotation cannot be separately coded. So use annotations for ideas that belong with the text annotated. A "bigger" idea or interpretation requires a memo - whose content can be coded like that of any other source.

To add an annotation:

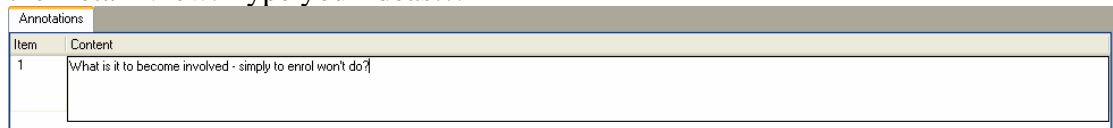
1. In the Detail View, select some words that require an annotation.
2. From the context menu select **Links>Annotation>New Annotation**.



OR go to the **Links** menu, or on the **Links** toolbar, click the **New Annotation** icon.



3. The selected text is highlighted. An Annotations tab appears at the bottom of the Detail View. Type your ideas...



4. Make more annotations to this source. (Note any selection of text can have only one annotation). They will appear, appropriately numbered, in the tab. You can always go to an annotation to edit or delete it. And when you print the source, you can have annotations printed as endnotes.
5. If you wish to hide your annotations, while you work in the Detail View, go to that **View** toolbar (or the **View** menu) and unselect **View Annotations**.

3. Writing a memo

There is an emphasis in all qualitative methods on using memos to capture thoughts and insights you have when you are working through your data: (see *Handling Qualitative Data*, Chapter 4.)

Memos are full status sources in NVivo. The program sees them differently from other sources only because you label them as memos. (The tutorial for Chapter 2 suggested a first memo called “Volunteering and me”. If you made that, it’s a memo simply because you put it in the memos folder. If you are using the sample data, you will find several other memos in the Data folder for importing.)

Any source – including any memo – can be linked to the content of any source. More on these “see also” links below.

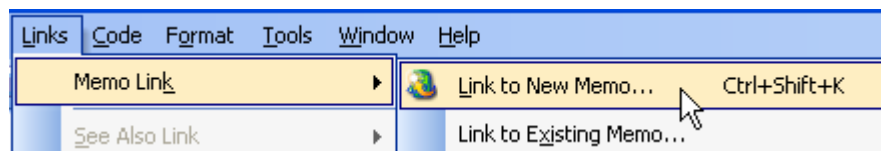
Any **source or node** (with one restriction) can have its “own” **Linked Memo**, linked directly to that project item. These memos, “owned” by a document or node, are optional, provided for the reflections on just that interview or concept.



The restriction? A Linked Memo can't itself have another Linked Memo. (This restriction protects you from endless tangles!)

To make a Linked Memo for a source or node

1. In **List View**, select the source or node for which you want to create a memo.
2. From the **Links** menu, choose **Memo Link >Link to New Memo**



Or right mouse to get the same options on the context menu.

3. Name and describe this new memo, (as shown in Tutorial 2), and write your thoughts. Remember to insert date and time. Note that the sources that have linked memos show icons for these in the **List View**.

Documents	
Name	
Anna	
Interview 1	
Interview 2	
Interview 3	
Volunteering and Me	

4. “See Also...”: ways of linking to related data.

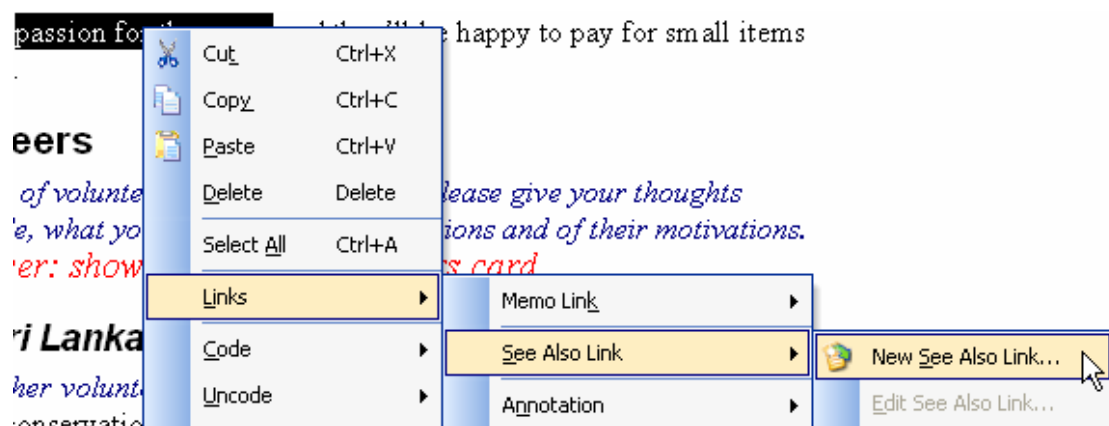
Qualitative research does a lot of linking – as in most interpretative work, the researcher is often wishing to say “See also the data to be found...” (*Handling Qualitative Data*, pp 75-6). Now the data records are becoming “richer”, with your own ideas and the links to related material.

NVivo provides a range of ways of linking for this purpose. As you reflect on your data document, you may wish to place a **See Also link** to a new item, to particular words or images in existing data items or in a file that is on your computer (in any other software) or a website. Here we will show the first two of these. Explore other options using the online Help.

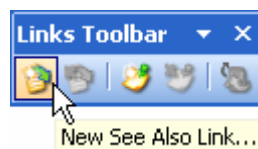
You can make Memos that are not directly linked to an item, to record your growing ideas about themes and concepts that you want to go back and explore later on. You can also of course keep those ideas in a notebook. But unlike the notebook, they can be linked directly to the text that gives you an idea, or the place you store it. This will matter when you wish to report and log the way you developed your analysis.

To link from content of a source to a new or existing project item

1. Open a document in your project. (Or any memo, external, or node).
2. Highlight some content you wish to link *from*.
3. Right mouse click and choose **Links>See Also Link>New See Also Link**.



Or get the same option from the **Links** menu, or on the **Links** toolbar, click the **New See Also Link** icon.

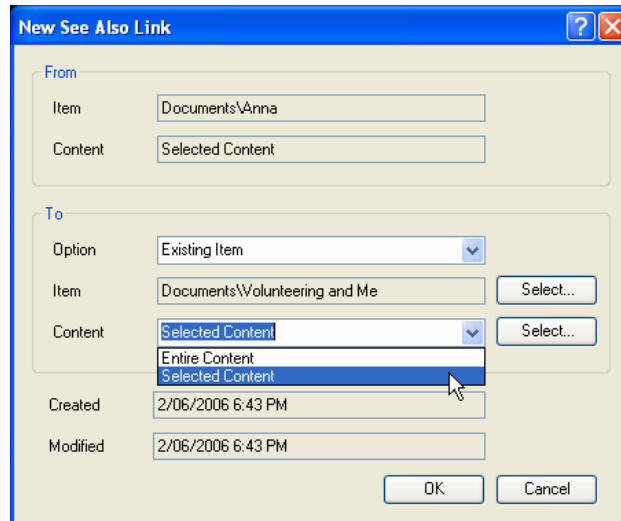


4. In the **New See Also Link** window, specify what you want to link *to*. If it is a new document or memo, this will be created and opened.

To link to particular content of an item

If your **Option** is to link to an existing item, you can select either to link to the whole or link to particular content (this is often more useful).

1. Select to make a “See Also” link to **Selected Content**. Click **Select**.



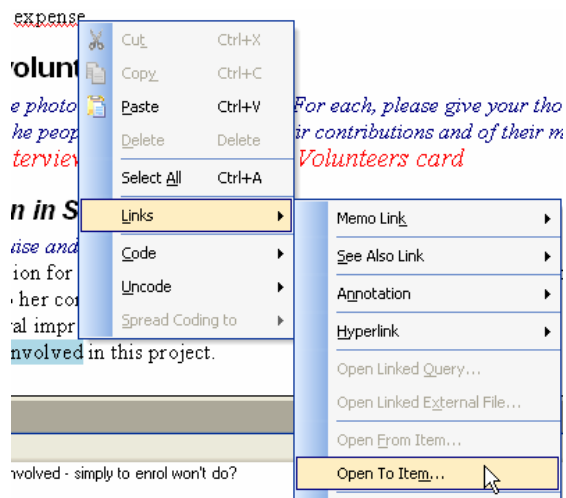
2. NVivo will open that item in a new window. Select the relevant content.
3. At the bottom of the window, click **Select**, then in the dialog, click **OK**. The link is made.



Note, you can make a link to selected content in the same document, useful if for example the speaker changed their mind on an issue later.

To open the “to” item

1. At any stage, you can go to the text you linked *to* from the anchor, now marked by a red wavy line under the text from which you made the link.
2. Click in that anchor, and right mouse to select **Links>Open To Item**.



5. Drawing it – the early uses of models

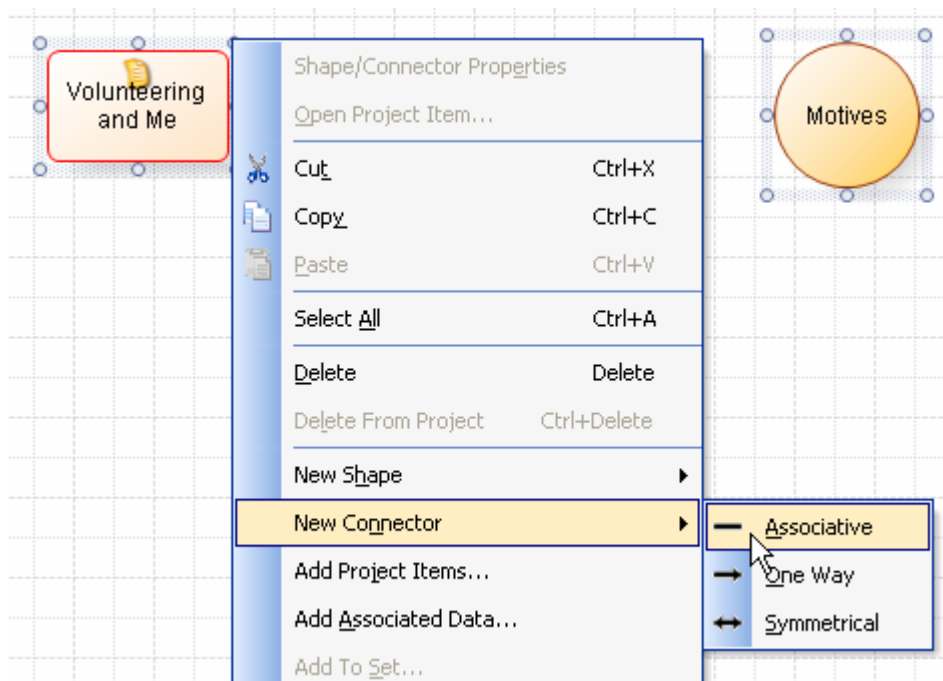
Throughout qualitative research, models are widely used, with many ways of representing hunches, discoveries and theories. (Go to *Handling Qualitative Data* Chapter 4, pp 76f, for suggestions for first uses of simple models as ways of sketching and exploring what you think you are seeing in the data.

You may wish to explore these techniques more fully by jumping to the discussion of NVivo’s model tools in the tutorial for Chapter 7. Here, the goal is simply to become aware of the possibility of modeling your emerging ideas.

To start a first model

Models are made up of shapes and connectors. You start a model by adding these to a blank “sheet”. You add new models just like any other project item – from the List View, using the **Main Menu** (Project menu), the **New** button or the right mouse context menu.

1. In **Navigation View**, click the **Models** button and click in the **List View**.
2. On the **Project** menu, click **New Model**.
3. In the **New Model** dialog enter a name and if you wish, a description. Click **OK**. An empty model is displayed in **Detail View**.
4. Now add either empty shapes or project items to the model. [There are many ways to do this: copy/paste, drag and drop, or use the Model menu or right mouse context menu.](#)
5. To connect two shapes, select them both and from the right mouse Context menu select **New Connector**.

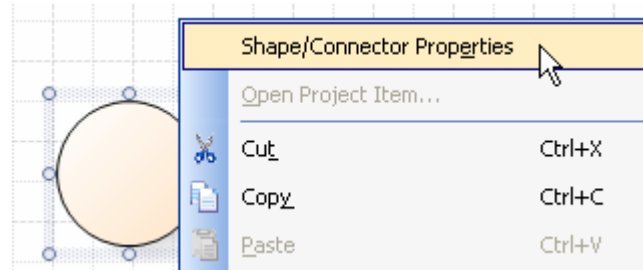


6. If you add Project items to the model, they are “live”: double click on them to open them in **Detail View**.

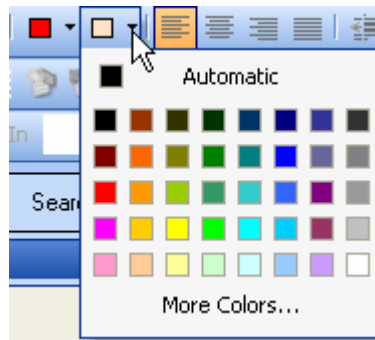
Shaping and changing the model's appearance

Appearance does matter, when you are drawing a model to show (to yourself or your colleagues) what you are seeing in your project. But beware of how much time you can spend on cosmetic touches!

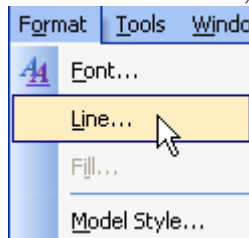
1. To name your shapes and connectors, double click on them to go to their **Properties**.



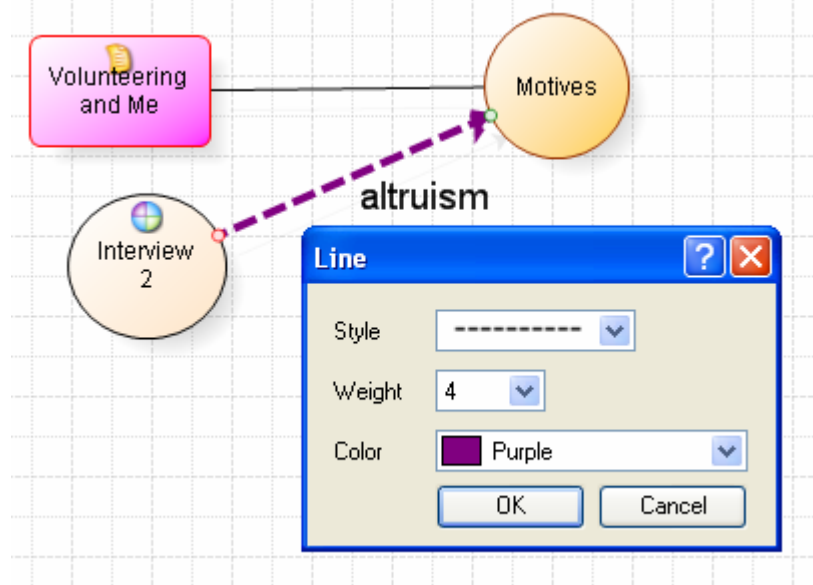
2. To color lines or fill shapes, go to the edit menu.



3. Select a connector, then from the Format menu that appears, select Line



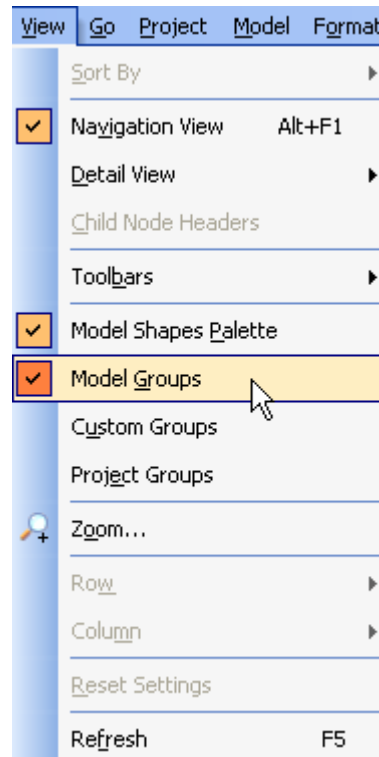
and you can give your connectors style, weight and color.



Customizing the model space

A final exercise in using the software concludes this tutorial. Use the menus to customize this modeling space to suit you. Models are a clear case for maximizing your screen “real estate”.

1. Remember that you can undock the Detail View - click **Docked** in the **Window** menu. Now maximize the undocked window, to have your model able to take up the whole screen .
2. From the **View** menu, select to hide the panels to left and right of the model – the Model Shapes Palette and Model Groups.
3. You can also Zoom in or out on your model.



This concludes the NVivo 7 Tutorial 4. You now have data, ideas about your data and a rapidly growing project. Remember to back up the project file after you exit this tutorial! Go to Chapter 4 of *Handling Qualitative Data* for advice on any of these research processes.

For most researchers, at this early stage in a project, the next task is to start gathering material according to topic. For this purpose, you need to code. If you are unfamiliar with qualitative ways of coding, go to *Handling Qualitative Data*, Chapter 5. In the next tutorial you'll learn many ways of doing coding in NVivo.